



## ● Efficient document management improving business processes ●

### The Background

Eden Housing Association is located in Cumbria and currently owns or manages around 2,000 homes in the north of the region. Its key objective is to provide more quality and affordable rural homes, with emphasis on effective business improvement and people development, as well as supporting local communities. The organisation has 75 staff, split across its head office in Penrith and eight smaller local offices.

### The Challenge

Eden was looking to improve its business processes, and to enable greater efficiencies across the entire organisation. Part of that aim was to reduce the time that employees spent scanning and indexing documents into the core housing system, and ultimately to automate its document processing system as much as possible.

ICT Coordinator Emma Wilson explains the need for Daisy's support: "The project was triggered by staff frustration, as the process of registering documents within our housing management system was very slow. It was also taking longer to find documents as volumes increased over time.

"Our overall aim was to enable staff to find and retrieve documents more quickly, and also to speed up the process up when adding documents to our Wisdom Electronic Document and Records Management (EDRM) system in the first place."

Eden Housing Association had been using Daisy's Wisdom EDRM software for a number of years already, but only as a document management store, through its Orchard Information Systems housing management solution.

Emma continues, "The software has always worked well, but only in the background as a very basic document store. We were not using any of the automation or enhanced functionality, and this was what we wanted to address. Our confidence had dropped to the point where we actually looked at different EDRM systems, thinking this would solve our issues.

"But after investigating other solutions and then talking with Daisy's Wisdom development team, we realised our issues were not with the software at all – but because we were not utilising it to its full potential. Once we were aware of its capabilities, we realised that Wisdom was comparable to, and actually better, than other solutions we researched."

### The Solution

Daisy's Wisdom consultancy team was invited in to advise on making the system more efficient and faster to use, so that staff could locate documents more easily. The ICT team also worked with Daisy to look at retention policies, in order to automatically reduce the amount of outdated and unnecessary documents stored in the system – enabling Eden to meet key regulatory requirements.

Emma describes some of the other benefits, "We redesigned our Kofax scanning solution with the help of the Daisy team, so our staff can index and register at point of scan, cutting out additional processes and saving time. Meanwhile, the new interface enables greater user interaction, and we are looking at testing the Wisdom mobile application – to enable our staff to access the software when out of the office.



"By implementing the Wisdom Generic Wisdom Integration Services (GWIS) Lite module, we can now automate a number of processes. For example, we're currently testing the automation of gas certificates, to enable these to come straight from our contractor and be fed automatically into the Wisdom solution – removing the need for additional user resource to re-file and re-register the documents."

### The Result

The wider Wisdom solution is now up and running at Eden Housing Association's head office in Penrith, and also networked across its eight smaller offices throughout the region. In addition to solving Eden's initial problem, a range of other great improvements have also been identified – with users having more confidence that the software is doing what they require, from the point of scanning and registering documents, through to finding the information they need at a later date.

After seeing the improvements which have been achieved in the first phase, the success of the project is now leading the ICT team

to develop the use of the software and how this might be rolled out across the rest of the organisation, and not just the housing systems.

Emma concludes, "We have gained numerous benefits by undertaking this project, and we credit a lot of this to the knowledge and commitment of the development team, and account management team at Daisy, who have worked with us over the past 18 months. We have a great relationship with the team, better than many other companies we deal with, and we find their 'can do' attitude very refreshing. They are willing to investigate and pursue developments, tailoring a solution that will help our business to improve and receive value for money from the software we have.

"A major lesson learned has been to speak to our existing provider in order to carry out improvements – as this solution offers so much more than just a basic EDRM, with the ability to truly automate and customise. We are continuing to work closely with the Daisy team, to improve the system, and we are really looking forward to the future and what the solution will bring."

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