

FileOptics

ELECTRONIC DOCUMENT SOLUTIONS

Is all your business critical information immediately available?



Ask us How

FileOptics International

Phone 07 3839 5788 | www.fileoptics.com | info@fileoptics.com

Case Study

First Option Credit Union



"FileOptics has certainly revolutionised the way we do business. Filing and paper storage has been completely eliminated overnight, allowing staff to spend more time on productive tasks. The modules are so simple to use and seamlessly integrate with our current processes. The project to implement FileOptics was really straight-forward from our point of view and the FileOptics team were great to work with." Piers Kennealy, First Option Credit Union

1. The Problem

A successful mid-sized Credit Union with head office in Melbourne, First Option Credit Union was seeking a way to move away from paper and make better use of documents in an electronic format. They had identified three main areas that they would like to start this transformation:

- Member Services
- Lending
- Accounts Payable

As well as these three areas, First Option had a legacy application that was capturing their core banking reports. This was also seen as an area for improvement.

2. The Solution – FileOptics hosted in the TAS Managed Services (TAS) environment

FileOptics can be hosted in three different ways:

- With the client's ICT managed services provider (TAS, in this instance)
- On the client's IT infrastructure
- On the FileOptics Cloud offering

First Option uses the ICT services of TAS and elected to use the FileOptics Server that is available to all clients within that environment. First Option operates a managed desktop environment (Citrix) delivered by TAS that the FileOptics system can happily operate in.

2.1 The Solution – FileOptics modules and how they are used.

First Option displayed their progressive culture by very quickly making full use of the various FileOptics modules. Initially First Option thought they would use FileOptics to help improve the efficiency of their Lending process, but quickly realised how easy it was to integrate FileOptics with other business processes. Within the first month of using FileOptics, First Option built five Cabinets, to cater for document archiving across Member Services, Lending, Accounts Payable, Reports and a specific cabinet for their relationship with one of their host employers, Tabcorp. The ease and flexibility of the system means that each cabinet can operate using a specific set of rules and security, completely independent of the other cabinets.

- **MS Office plugin** – all staff are making use of this useful module, however the loans department make particular heavy use of this module, committing documents directly from MS Word, MS Excel and MS Outlook. Building a loan file of electronic documents rather than producing reams of paper.

It is also used by the Accounts Payable team to commit invoices into FileOptics that have been received by email. They are then approved for payment by Managers using the notes function from within FileOptics.

- **FileArchiver** – this module is used to quickly and easily commit a range of file types into FileOptics. The on-screen dropbox, makes this process fast and simple.

- **FileCapture** – the FileOptics scanning module comes to the fore in the Accounts Payable area, where once a week a bulk scan of paper invoices is done, allowing for the destruction of this paper and the approved invoice is stored securely in FileOptics. FileCapture is also being used to gradually scan historic paper files into the system.

- **Reports Capture** – FileOptics is now used to automatically capture all core banking reports for First Option. Once within FileOptics, they can be quickly and easily viewed by staff with the appropriate security clearance from any geographic location.

- **FileView** – while getting documents into the system is very easy; searching for, viewing and if necessary downloading documents is even easier via the browser based FileView module.

This 'server side' module allows for the fast and easy location and viewing of documents that are in the FileOptics system. More than just an archive for First Option, FileView allows them to leverage the use of documents in their electronic format from the beginning of a business process, rather than just scanning and archiving the paper at the end.

3. The implementation

FileOptics is typically set up using the client's pre-existing filing structure. First Option staff reported feeling at ease in the FileOptics system from day one, due to the familiarity of the filing structure. Every time a document is committed to the system, compulsory indexing information is applied to the document. This discipline allows for the easy retrieval of documents through FileView.

FileOptics and TAS worked closely to ensure the system was thoroughly tested in the client's environment before any go live was commissioned.

4. Next steps

First Option has already seen fast and rapid gains from using FileOptics, however they are not stopping there. Already they are investigating the use of the FileOptics Workflow module, FileFlo, to automatically direct documents through a business process. Other opportunities across the business are also being considered such as delivering Board Meeting materials electronically as well as other internal meeting materials.

FileOptics is allowing First Option to do more business more quickly.

Solve the **Electronic Document Management** puzzle with

FileOptics

ELECTRONIC DOCUMENT SOLUTIONS

Reports Capture

- Core Banking
- Manufacturing systems
- Mining Systems
- Any operational "live" system
- Business Intelligence capability

Scanning

- Bulk scanning
- Various file formats (TIFF, PDF, JPG)
- Document page separation & formatting
- OCR and Indexing
- Barcode functionality

MS Office & PDF Plugins

- Commit documents directly from:
- MS Outlook
- MS Word
- MS Excel
- Adobe Acrobat

FileArchiver

- Desktop dropbox for electronic files
- Any file type can be committed

FileView

- Browser based viewing module.
- Compatible with mobile technology: iPad, iPhone, Tablets, laptops.

Workflow

- Browser based
- Automate document centric processes
- Monitor process performance/user actions
- Productivity gains
- Business process improvement
- Activity reporting

Information at Your Fingertips

Ask Us How

FileOptics International

Phone 07 3839 5788 | www.fileoptics.com | info@fileoptics.com