

## Document Management Case Study

### **Summary**

Link Group is one of Scotland's largest providers of new and improved homes and support services. Their document management requirements had outgrown the capabilities of Windows Explorer.

### **About the client**

Since its formation over 40 years ago Link has grown to be one of Scotland's major providers of new and improved homes and support services, with almost 9000 tenants, service users, homeowners and other customers in 26 Scottish local authority areas. Link currently employs 350 staff in 7 main and 20 smaller offices.

### **The Problem**

Documents & records were stored in Windows Explorers on a shared network drive. With 160 gigabytes of data, management of the directory structures and finding documents was becoming increasingly difficult. In addition, managing emails was particularly difficult as they were not filed centrally for easy retrieval.

### **The Solution**

File Stream will be implemented throughout the property and tenant departments so all documents including emails are filed in virtual filing cabinets for easy retrieval by appropriate search criteria (e.g. tenant name, property address, subject such as planned maintenance). Staff will file, search for and view documents (according to their permissions) from any office or over the Internet. Actions can be easily set for specific documents, dates and times in File Stream's own diary. More complex processes are managed using the Workflow document routing module. Paper documents are scanned in using networked multifunction printer/scanners.

### **The Benefits**

All documents concerning each property and tenant are will be filed in one appropriate virtual cabinet which means that they can be quickly found and viewed by all authorised users. It is no longer possible for documents to be lost (through filing them locally or removing them from an Explorers folder). Management of the database & electronic documents is now much easier for the IT department than the old rapidly expanding shared file structure. Because all documents filed into the new File Stream system are encrypted, they are totally secure, preventing accidental or deliberate misuse.

### **Why File Stream**

After a rigorous selection process, File Stream was chosen from 8 electronic document management systems considered. The staff involved in the due diligence process chose File Stream because of its look and feel combined with its ease of use. Functionality was high and the company's "can do" approach made them the obvious winner.