FINANCIAL SERVICES

RETHINK PRINT WITH KONICA MINOLTA

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Giving Shape to Ideas

CREDIT UNION MAKES LIFE SIMPLER WITH CLOUD-BASED CONTENT MANAGEMENT

A cloud-based CMS is helping a large credit union operate more efficiently, serve customers better, and meet regulatory requirements more easily.

OUR CUSTOMER'S CHALLENGE

Our customer is a credit union that provides services to around 10,000 customers. The organisation archived its documents electronically, but was using a system that wasn't flexible enough to keep pace with changing needs or new customer service aims.

To help its people work and serve customers more efficiently, the credit union wanted to make it easier to scan documents into the electronic archive, and find and retrieve them. It also wanted to give remote users — such as board members — simple, secure, access to electronic documents.

And given the highly regulated nature of the industry, the credit union was well aware it needed to comply with document retention periods, and be able to prove the authenticity of its electronic documents.

OUR SOLUTION

We talked with people from different areas of the credit union's business to understand what they needed and how we could help.

In partnership with Konica Minolta, we recommended a cloud-based content management solution (CMS) to help them solve their challenges and achieve their ambitions. The solution provides:

- A simple one-touch document scanning routine at any of the credit union's Konica Minolta MFDs.
- Optical character recognition (OCR), which automates document categorisation and indexing and makes the content fully searchable.
- The ability to set a retention policy for each document type.
- A full audit trail.
- Secure internet-based access for remote users.
- An email address for use by credit union customers.

"ADDING DOCUMENTS TO THE NEW CMS IS A BREEZE, WITH A SIMPLE ONE-TOUCH SCAN ROUTINE AND AUTOMATED CATEGORISATION AND INDEXING"

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BENEFITS EXPERIENCED

MORE DONE IN LESS TIME

The simple scan routine and automated classification and indexing make it quick and easy for people to add documents to the CMS.

Document search and retrieval are also fast and simple: the CMS interface is easy to use, there's a wide range of search criteria, and each document's content is also searchable.

BETTER CUSTOMER SERVICE

Because it's easier for credit union staff to find the documents they need, they can respond to customers' queries more quickly.

The email address for customers provides a convenient alternative way for them to contact the credit union. And because the CMS notifies the relevant members of staff when an email arrives, customers receive prompt responses to their enquiries.

ENHANCED INFORMATION SECURITY

Strictly controlled user access protects information by allowing users access only to the documents they need to carry out their role.

SUPPORT FOR REGULATORY COMPLIANCE

Retention policies help ensure personal information is held in accordance with company and industry guidelines. The CMS sends automatic notifications when documents reach end of life in the archive.
Audit trails show every step in the document lifecycle and help the credit union meet the regulatory requirement to prove the authenticity of every document in the system.

SIMPLIFIED REMOTE ACCESS

Because the solution is hosted in the cloud, remote can access it securely over the internet, with no need for expensive private lines or VPN solutions.
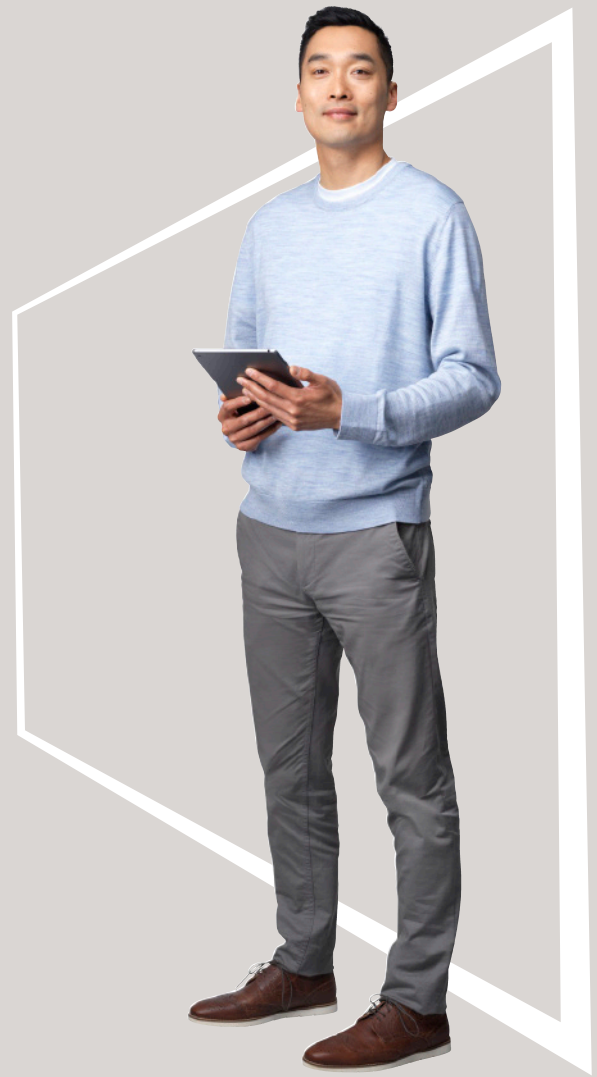
> **"BECAUSE THE CMS IS HOSTED IN THE CLOUD, THERE'S NO INFRASTRUCTURE MANAGEMENT OVERHEAD FOR THE CREDIT UNION. CLOUD HOSTING ALSO MEANS THAT REMOTE USERS CAN ACCESS DOCUMENTS SECURELY OVER THE INTERNET WITH NO NEED FOR EXPENSIVE PRIVATE LINES OR VPNS"**

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