

# OIT's DocFinity Suite Provides Retail Group with EDM System

## challenge

*To track the large amounts of paperwork and trace the paper intensive processes that the organization creates across the entire expanse of the United Kingdom*

## solution

*OIT's DocFinity® Suite of Document Management Software installed and supported by OITUK*

## benefits

*tCG has been able to streamline their paper-intensive processes and provide a centralized repository for supplier invoices for tCG members around the UK*

The Co-operative Group (tCG) established in 1863, with much growth and expansion over the years, is a family of businesses engaged in a wide range of activities, and with an annual turnover of more than £ 4.7 billion and over 55,000 employees. The Co-operative Group is big business.

## the need

tCG is an independent association of businesses united voluntarily to meet their common economic, social, and cultural needs and aspirations through a jointly owned and democratically controlled organization.



Obviously, tracking the large amounts of paperwork that such an organization creates across the entire expanse of the United Kingdom would be a difficult task. In order to trace these paper intensive processes, tCG was using two existing legacy imaging applications. Unfortunately, these systems did not provide the efficiency, or the results that this growing organization desperately needed.

## the solution

For this reason, tCG turned to Optical Image Technology, Inc.'s (OIT) DocFinity® suite of electronic document management solutions. tCG chose to license DocFinity Imaging, DocFinity Hierarchical Storage Manager (HSM), and DocFinity IntraVIEWER® (Browser Access), which were purchased from and installed by OITUK, a subsidiary of Graphic Data, OIT's European Distributor.

"We liked what we saw with OITUK and OIT's document management software," comments Rob Young of tCG. "We knew that they would be behind us from start to finish with the implementation, and beyond that with continued support."

With DocFinity Imaging, users at tCG can quickly locate and view the information they require. Once accessed, they can fax, print and add annotations to existing files. DocFinity Imaging has a user-friendly interface that allows users to be up and running the system in no time at all.

OIT's software allows the addition of virtually any computer-generated file to an index structure – an intuitive list for storing scanned pages and reports. DocFinity Imaging turns the process of document archival and retrieval from a time and money consumer to a valuable source of efficiency, cost savings, revenue enhancement and improved customer satisfaction.

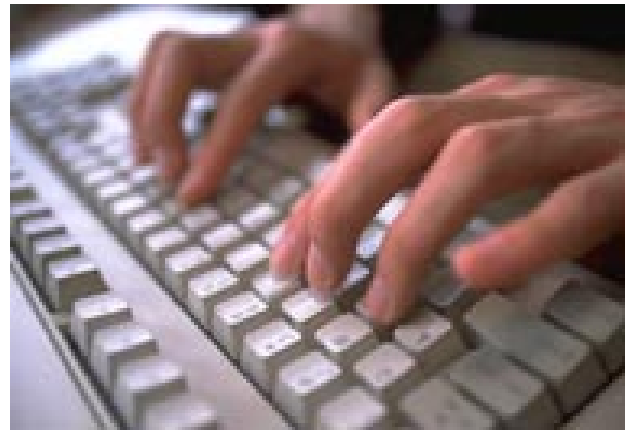
tCG enters documents into the system by scanning them into batches. Batches are similar to stacks of paper that you would usually hand file. There is no limit to the number of pages that can be scanned to a batch and there is no limit to the number of batches that can be created. tCG can use multiple scan stations to scan batches of documents while other stations are simultaneously used to index and retrieve.

DocFinity HSM is a Hierarchical Storage Management program that intelligently processes requests to retrieve, store and/or move information from multiple storage devices. Because DocFinity HSM processes all requests in a logical order, the mounting of platters is reduced and efficiency is greatly enhanced.

DocFinity IntraVIEWER adds universal power to tCG's business processes by providing direct access to their electronic documents to anyone, anywhere, anytime via the World Wide Web. DocFinity

IntraVIEWER is a low cost, efficient way of accessing current and historical information from locations anywhere via a standard web browser such as Netscape or Microsoft's Internet Explorer. Users can retrieve any object that is stored within OIT's repository.

The DocFinity software from OITUK is being used within various departments at tCG. Within the Accounts Payable Department, supplier invoices are bureau scanned and bulk loaded into the DocFinity system, with additional index data validation via line-of-business applications. Users approve invoices electronically, by using images rather than paperwork. Bulk export facility within OIT allows tCG to generate CD's for distributing images around the country.



"The DocFinity system now provides tCG with a centralized document repository for historic and new documents across several departments", explains Vijay Magon, Technical Director of OITUK. "This allows for a tremendous improvement in efficiency and productivity right from the start."

The DocFinity system is integrated with tCG's legacy application called DiDos, RUMBA terminal emulator, and a new Claims Processing application.

#### the benefits

The benefits of implementing the DocFinity solutions were numerous and quite far reaching. Most importantly, tCG has been able to streamline their paper-intensive processes and provide a centralized repository for supplier invoices for tCG members around the UK. This has led to significant reductions in bottlenecks and backlogs of invoices waiting to be processed. Users now have rapid access to important business documents. In addition, tCG is able to provide improved services to its customers.

"We have been extremely impressed with the results thus far by using OIT's system," remarks Young. "We are eager to see how we can improve our processes even more as we move forward."

#### the future

The implementation of the DocFinity software by OITUK has been so successful that tCG plans to move ahead and improve the two-way integration between its systems. tCG recently added a new application, with close, two-way links with the DocFinity system to share Claims documents between the two applications. tCG also plans to allow users to access invoices via the DocFinity IntraVIEWER module.

"We are committed to back tCG and OITUK in their mutual relationship with the DocFinity software," notes Scott Buchart, President and CEO of OIT. "Together, we can ensure that solutions will take tCG far into future, growing right along with their organization."

**Optical Image Technology, Inc.**

[www.docfinity.com](http://www.docfinity.com)

**The Co-operative Group (tCG)**

[www.co-op.co.uk](http://www.co-op.co.uk)

**OITUK**

[www.oituk.com](http://www.oituk.com)

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