Datalytyx
Making Information Work

Motability:

Enterprise scanning and document management solution enables UK charity to process grants faster, improve fundraising activity, reduce costs and increase accuracy

Over the past 35 years, national charity Motability has helped three million people to get mobile by exchanging their government-funded mobility allowance to lease a car, scooter or powered wheelchair.

The organisation had an ageing legacy scanning system with unacceptable downtime, errors and service interruptions – which led to Motability engaging Datalytyx to implement a high performance scanning and document management solution based on Fujitsu, KnowledgeLake and Microsoft technology. "We now have a fully supported, scalable and reliable solution for our paper-processing requirements and are planning the roll-out to other departments," says Richard Hopkins, IT Services Manager.

Motability

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Client

Charity helping disabled people with mobility.

Challenge

Ageing legacy system - scanning and releasing documents was inflexible, time-consuming and error prone.

Solution

Scalable enterprise scanning solution with Fujitsu, KnowledgeLake and Microsoft technology.

Benefits

Productivity gains, faster processing, reduced risk, improved governance, lower costs through reduced storage and flexible pricing model.

Challenge

Motability has a number of high volume paper-intensive processes across the organisation, with associated risks, storage costs and productivity constraints. Hopkins continues, "Our requirement was for a scalable solution that could address general scanning and document management requirements on a central Microsoft SharePoint repository, while at the same time offering functionality in support of specific departmental needs." Scanners were slow to operate and could only perform single-side scanning; software was also basic, requiring manual linking of images in a folder to line of business systems and SharePoint. The system was also expensive to run and maintain, relying on both proprietary system knowledge and an outmoded and inflexible volume-based pricing model. At the same time, Motability wanted to better address security, compliance and audit issues relating to confidential client data and Gift Aid records.

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> IT Services Manager
> Motability**

Why Datalytyx?

Motability evaluated various providers and chose Datalytyx, which proposed and architected a solution to initially cover Grants, Fundraising and HR, with later plans to bring the solution to Finance and other departments. The solution consists of Fujitsu 6130 Workgroup Scanners, KnowledgeLake capture and imaging servers and Microsoft SharePoint as document repository, with Fujitsu selected based on the small footprint, barcode recognition and double-sided scan capabilities. "Motability has a Microsoft strategy with SharePoint as the intranet as well as the CRM repository for Grants – with this in mind we wanted to build further on our SharePoint investment," says Hopkins, adding that the Dalalytyx architect was extremely knowledgeable about KnowledgeLake and integration issues, plus an understanding of the business processes involved: "We were looking for a stable, reputable organisation that came recommended; Datalytyx was an easy choice."

CASE STUDY

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A powerful enterprise scanning solution

With 40 users in the Grants department, the system handles 250-450 application documents and a further 250-500 associated or supporting documents per month. The department can scan 10-15 different document types into the solution. Once scanned, a document is indexed by KnowledgeLake based on a unique identifier and released into SharePoint. Example documents include application forms and supporting documentation such as proof of benefit, income support and doctors' letters.

Fundraising, which deals primarily with Gift Aid returns, raffle returns and the processing of donations, can receive up to 22,000 raffle returns per campaign. "We can scan a batch in five minutes now where it used to take 30 minutes," says Denise South, Database Administrator, Motability. "Where we used to need to attach images manually, it is now automated." Campaign responses are routed from the mailroom to the fundraising department where staff scans the slips. 2D barcodes are pre-printed on the slips: the scanner uses optical character recognition functionality to read the barcode and KnowledgeLake queries the database and auto indexes the slip based on all the "to" field information stored in the database. "Less human interaction means fewer errors," says Phillip Hesse, Network

Administrator. Once indexed, slip information is released to KnowledgeLake capture server, which releases the slip into SharePoint and retrieves a URL web link, then updates the relevant record in the fundraising database with the correct location identifier. HR also uses multi-functional devices and KnowledgeLake to scan and release documents into SharePoint, making use of password-protected encrypted PDFs ensure confidentiality of information.

Benefits: reliable, extendable and user friendly

The solution is fast, reliable, scalable and user friendly, with an open architecture enabling further development and integration; outages and delays became thing of the past. With documents available in an easy-to-access secure central repository, backed-up and version controlled, the risks and costs associated with paper processing greatly reduced. Far less time is spent on scanning tasks, with the indexing and release of documents into line of business applications and SharePoint streamlined. There are fewer errors and delays, with manual indexing and linking steps to line of business applications removed. The solution also has lower maintenance and training overheads, and can address the needs of multiple departments.

With reduced storage requirements, documents can be stored more cost-effectively off-site or recycled instead of filling up filing cabinets. Ease of compliance reporting also improved, including straightforward storage and retrieval of Gift Aid records and the supporting documentation for grants. The cost-effective system also leveraged existing infrastructure and investments, while the comprehensive functionality supports specific departmental needs: for example, encrypted PDF documents in HR, barcode recognition for raffle returns in Fundraising and batch scanning for Grant applications. Last but not least, with the solution competitively priced for scalability and enterprise adoption, the scanning backlog was quickly removed, with no scanning volume limitations and incremental costs featured.

About Datalytyx

Datalytyx is a leading UK provider of big data, digital transformation, governance and analytics solutions, all delivered as a service from the cloud. Our client-focused approach delivers rapid gains and sustained ROI, meets requirements to store and manage huge data volumes, deploys powerful business-focused analytics, and digitises essential business content and processes. The trusted management information that results enables more effective and more profitable decision-making. Our diverse client base includes AstraZeneca, Nissan, ABN AMRO, Surrey County Council, EasyJet, Allianz, Unisys, Capita, Eversheds, Veolia Environment and UK local government. We also partner with other leading providers to deliver best-of-breed solutions, including Microsoft, K2, Talend, Tableau, HP Vertica, KnowledgeLake and Hortonworks.