

Centralised Document Management and improving efficiency at The Access Bank UK Limited

the access bank uk >>>

Company: The Access Bank UK Limited

Country: United Kingdom

Industry: Banking

Profile: The Access Bank UK Limited provides a range of Personal and Corporate Banking products and services including Trade Finance.

Key Drivers: Simultaneous access to documents without having to wait for the file. Reduction in misfiling. Fast access to documents.

The Access Bank UK Limited is a full service bank, offering a range of banking products and the highest quality of service to corporate and personal customers from the UK and Sub-Saharan Africa. It has strong commercial ties to Africa and a detailed local knowledge, which is invaluable for its customers involved in that region. This is complemented by deep experience in the UK.

The Access Bank UK Limited is a wholly-owned subsidiary of Access Bank Plc (a major bank in Nigeria and the surrounding countries in Africa, incorporated in 1989).

The need for a document management solution

The Access Bank UK Limited required an electronic document management (DM) solution that could ensure faster access for users to a wide range of documents and that would enable multiple bank staff to have simultaneous access to documents without having to “wait for the file”. The bank also wanted to minimise the problems caused by manual misfiling of physical documents.

Implementing the best practices for the bank’s internal document management and the need to provide high-speed access to documentation from multiple locations were the main objectives of deploying a DM software solution.

Choosing Document Manager

The Access Bank UK Limited considered a range of DM software solutions that would meet both their immediate and future document management requirements. They wanted a solution that would be easy for end-users to operate, and quick to implement. The solutions needed to be simple to use in order to minimise staff training overheads, and it needed to meet their budgetary requirements.

The bank settled on a shortlist of three products, but were “most impressed by Document Manager’s clean and simple interface, its functionality, expandability and speed of deployment”. In addition, the bank found the Document Logistix cost model to be “extremely competitive” and were impressed by the quality of the pre-sales support. After considering the available options, The Access Bank decided that the Document Logistix solution met all of their requirements.

CASE STUDY: Document Manager™ – The Access Bank UK Limited



“Installation was very straightforward and trouble-free. The software is flexible and easily configured. The integration of barcodes is timesaving and ensures documents are uniquely indexed.”

Sean McLaughlin
Finance Director

Benefits of Document Manager

- Ease of use
- Configurable; can adapt as the business grows and changes
- Secure retrieval of information from remote locations
- Enquiries can be dealt with more quickly
- Significant reduction of paper in the office
- The integration of barcodes is timesaving and ensures documents are uniquely indexed
- Tight control of document security

The Document Manager Solution

Document Manager is a powerful and comprehensive archiving and document workflow software solution that goes far beyond the conventional capture and storage of documents. It centrally manages the flow of documents through an organisation, maintaining constant document and user security by controlling who can have access to specific documents and files. It provides tight control of file and document editing – yet provides immediate online access to those who are authorised – all under a highly disciplined central control regime.

“Installation and implementation of the various software modules was very straightforward and trouble-free. The document management software solution is flexible and easily configured. The integration of barcodes is timesaving and ensures documents are uniquely indexed” said Finance Director, Sean McLaughlin.

Document Manager requires little training. The intuitive Drawer/Folder/Document structure and standard Windows interface makes operation easy for new and infrequent users.

Currently, Document Manager is being used to manage the bank’s new customer application forms. The Trade Finance team also wish to make use of it to digitally capture and record letters of credit and import/export documentation. There are many other areas of the bank that will make use of this document management suite in due course.

With Document Manager, The Access Bank UK Limited staff can access document details very quickly to answer queries. Audit trails are clear and simple, with a full daily data backup, which satisfies the bank’s disaster recovery requirements.

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