

## Queen’s University Belfast implements Document Management Solution

**Company:** Queen’s University Belfast

**Country:** United Kingdom

**Industry:** Education

**Profile:** Queen’s University is in a Russell Group University contributing 1.9 billion to the UK economy.

**Key Drivers:** Achieving Corporate Plan Objectives, Compliance, Environmental and Process Improvement.

When the People and Culture Directorate at Queen’s University Belfast embarked on an HR Transformation project, digitalisation of personal files was uppermost on the technology strand of the project. Given the essential integration with the University’s HRMS, iTrent, partnering with Document Logistix was the logical step.

Glenn Campbell, Head of HR Services at Queen’s University Belfast said, “Our Corporate Plan objectives include improving user experience by leveraging technology. This project aligned perfectly to that. With the growing challenges around legislative compliance in areas such as GDPR and UKVI, this project became not only a desire but a necessity. I’d been aware of Document Logistix for a few years through the iTrent circles and had heard many positive reports. Very quickly, the Document Logistix team understood our needs and truly worked as a partner in helping us deliver a solution that has been transformational in how we work.”

### The challenge of existing Human Resources Documentation

A member of the prestigious Russell Group institutions, Queen’s University Belfast is accustomed to receiving recognition for achievements in research and teaching. Achieving this success requires underpinning corporate services and processes that are innovative and effective, to best meet core objectives. A key priority for the People and Culture Directorate, which interacts with approximately 15,000 applicants per year, recruits 700 new staff annually and supports around 4,200 staff day to day.

When the project began, hard copy personal files were still commonplace within the University’s People and Culture Directorate and similarly within Finance areas of Salaries and Pensions. Whilst iTrent provided the main platform for transactional processing in these areas, there were clear inefficiencies, risks and practical difficulties associated with handling personal files.

## CASE STUDY: Document Manager™ – Queen’s University Belfast

"In 25 years of software implementations, I've seen many products promise plenty but ultimately come up short. Where Document Manager is concerned, I can honestly say that it has truly transformed how we work and been a roaring success with the users."

Glenn Campbell, Head of HR Services, Queen's University Belfast

Glenn commented: "It was clear our processes needed modernisation. Use, storage and delivery of hard copy files posed a range of risks also didn't fit with our corporate sustainability aspirations so there was really no shortage of reasons to undertake the project. We initiated a collaborative project team comprising colleagues from Finance, Information Services and People and Culture, undertook our research, developed our business case and gained the funding for the project. We then worked closely with Document Logistix to ensure that tasks, such as dealing with the back scanning of our files, were carried out to our requirements."

### Document Logistix listens; it's all about you

Document Logistix builds solutions around customer requirements rather than a feature set. Document Logistix was able to collect all legacy and current paperwork, almost one million pages, and scan and categorise documents on behalf of Queen's University Belfast. In the process Document Logistix also captured electronic pension documentation and imported it into Document Manager. In a relatively short time, the University had a centralised solution.

The first and essential action is to listen and to understand the customer's business and any underlying workflow process or technology requirements. Document Logistix then develop a solution that facilitates the capture, organisation, security, storage, and retrieval requirements of HR employee documentation.

One of the innovative aspects of the Document Logistix solution is the way in which all documents are captured through multiple channels. This may be direct from iTrent or via scanner, mail merge and file share. The input method greatly speeds the information acquisition process and document checking, and reduces the errors that can lead to costly audit failures. Reports on the DM5 Dashboard ensure processes are being followed and provide a very simple and fast overview.

Once captured and stored, permissions can be assigned to documents so that only the relevant staff have access at appropriate levels to sensitive information. Access levels can be assigned across a range of options, from full access to view-only.

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### Understanding customer requirements

The introduction of Document Manager has realised numerous benefits for Queen’s University Belfast and for the system users.

“The contractual notifications between our HR Hub and Salaries department are now all conducted through Document Manager. No more emails or sending hard copies between the departments - which pleased our users immensely!” commented Glenn.

The University has realised improvements in process efficiency as well as gaining a streamlined, compliant approach to records management with configuring in the University retention schedule for the records. Internal UKVI audits now take a fraction of the time in locating the relevant documentation. Generally, users enjoy complete control in one centralised, digital location without wastefulness or the risks associated with tracking physical documents or working with multiple data silos.

Some benefits were anticipated through the business case but others were unexpected.

Glenn commented: “We are currently in the process of redeveloping our office floor by removing the Lektreivers that held all the hard copy files. We’re putting in new break-out spaces and meeting places instead, which is great! We now extract a data file from Document Manager and use tools such as Power BI to gain insights and provide analytics on the volumes and types being processed through DM. All exciting stuff, which seemed a pipedream 18 months ago.”