

# A new corporate archive to Trust

**In today's competitive business environment it is absolutely essential for banks to stay ahead through continued innovation and increased efficiency. This means that they must place ever-increasing demands on developing an effective document management set-up. With this in mind the highly-reputed British bank, Secure Trust Bank PLC, switched their existing basic electronic archive system to a complete document management infrastructure.**

Founded over 50 years ago, Secure Trust Bank PLC is a well-established full service bank serving customers predominately in the West Midlands and the North of England. The bank offers a great variety of financial services. One of their core products is a household budgeting service marketed under the Secure Homes and Onebill brands. Being the market leader in this field of service the customers in the Birmingham-based bank quite rightly expect that the bank demonstrates the ability to manage vast amounts of information.

And the ability to meet this expectation is the very heart of a modern bank's service,

since it is the key to service, security and efficiency. This means that information such as financial statements, journals, loan agreements, letters and other documents are handled in a safe and easy manner and that they are always accessible at all of the bank's branches.

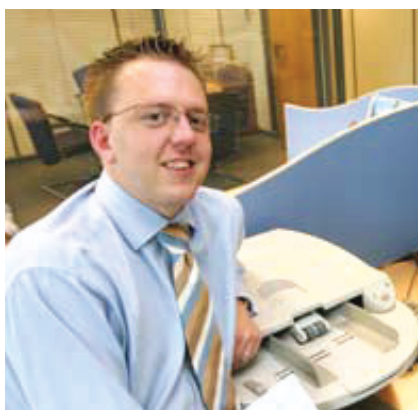
Each and every business document in the bank must be captured, stored, and indexed in one common corporate archive, regardless of whether it is a report, a physical document, an e-mail, or whatever. This information has to be available to authorised personnel, regardless of time and place. The consultants of the bank can access their relevant customers or prospects information whilst on the move and internal staff can investigate the same document if also authorised to do so – this ensures that everyone is working with the most up-to-date information. No longer is it reliant on individuals to remember the correct procedures to process the documents in the bank. The system offers pre-defined workflows that are properly documented, and at the same time monitor for and cope with the exceptions that are bound to come up.



*"In this way, and in this way only, you will be able to build the efficient, flexible and scalable bank of the future. A bank where all information is kept secure, easily accessible by anyone authorized to do so irrespective of location, and where everything is done according to best practice," says Keith Deakin*

*– Keith Deakin, Joint Managing Director at Secure Trust Bank.*

# “MultiArchive has worked well for Secure Trust Bank”



*“Multiarchive has worked well for Secure Trust Bank and we look forward to extending our use of the product in the future. Life would be a lot easier if all software performed and was as well written and developed as Multiarchive”*

*– Mat Stevens IT, Manager of Secure Trust Bank PLC, UK*

## Changing horse midstream

Secure Trust has been using a basic electronic archive for many years. Reports from the banking application were filed electronically and many paper documents were scanned into the archive. The bank wished to move further up the ladder by implementing a complete electronic document solution, which integrates the remaining information systems and business solutions the bank already deployed.

Even though we all know that it can be dangerous to change horse midstream, Mat Stevens, IT Manager at Secure Trust chose to do so. “For seven years Secure Trust had a basic archive solution in place, and the system has served us well – it just wasn’t the right platform for us for the future vision that we had for the bank due to its limited capabilities.”

Finding the platform for the future, Mat Stevens had a number of prerequisites.

The solution should be:

- functionally rich to meet all current and future requirements of the bank
- well-developed so that it required no regular support from the supplier
- easily integrated with their iSeries-based banking application
- easily integrated with various PC applications
- open and extendable – not requiring the vendors assistance for every change
- easy to implement – taking weeks, not months or years
- easy to use – requiring a minimum amount of training
- able to import all the documents from the existing archive



Last but not least, it had to be extremely cost effective from the start and over time.

MultiArchive met all of these requirements to such a degree that Secure Trust Bank and Mat Stevens now act as a reference site for Multi-Support – and to quote Mat Stevens “MultiArchive and our migration to MultiArchive met our original expectations and objectives but now allows us to develop our archive and workflow processes to improve the way we work and service our customers effectively in addition to satisfying regulatory requirements.”

The conversion was not hassle-free, but Multi-Support managed to convert all of the data that has been held in a proprietary system over the past seven years.

#### **And it Pays Off**

“In spite of the cost for conversion and new software licences, MultiArchive was providing Secure Trust with a Return On Investment that was one of several compelling reasons for us to choose MultiArchive as our future Document Management platform.”

“At this point in time we have converted all the existing documents, implemented scanning, automatic report filing, and PC document management, and the next phase will be the implementation of the Workflow processing module which will bring huge efficiencies to our organisation,” concluded a smiling Keith Deakin.

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