



ERINACEOUS GROUP PLC

Integration Drives Productivity for Property Management Group

Erinaceous Group plc (LSE: ERG) headquartered in Croydon, UK, began in 1999 with the acquisition of Haywards Chartered Surveyors, an established management and building consultancy business. Since then, Erinaceous has grown organically and through acquisitions to become an end-to-end provider of property management and insurance services from construction through tenancy. Its three primary lines of business – Residential Property Services, Commercial Property Services and Property Insurance Services – generated £151.8 million in 2005.

“We recognised that through acquisitions, we had lots of complementary business services and needed to maximise cross-selling opportunities,” notes Ryan Perryman, head of group business systems development at Erinaceous. “But we didn’t have a tool for facilitating that; there wasn’t one system to seamlessly support the communication necessary for cross-selling. We had document management and workflow in one division and knew from experience what the technology could do for us.”

After gathering requirements and evaluating numerous vendors, Erinaceous chose OnBase, an integrated suite of enterprise content management (ECM) functionality developed by Hyland Software. Because of OnBase’s ability to integrate with other applications rapidly and cost effectively, Erinaceous recognised that the software would also help it meet its second major goal: integrating the frequent acquisitions into the standardised business process as quickly as possible. “We also anticipated a number of other benefits such as compliance, saving physical space, faster access to documents and automating processes,” Perryman adds.

OnBase is critical to completing daily tasks for hundreds of individuals employed at the more than 30 companies that comprise the group. These employees are geographically dispersed across more than 20 UK sites and a business process outsourcing division in India. Residential Property Services and Commercial Property Services use OnBase for numerous business-critical processes such as maintaining documents and contracts relating to properties. OnBase is also used to increase efficiency of back office processes that affect the entire enterprise, such as accounts payable and human resources.

Virtual Post Room Accelerates Processing

The strategy to accelerate business processes by eliminating paper begins the minute the post enters one of the two main post rooms. Incoming documents are scanned in duplex (two-sided) colour using document scanners from Böwe Bell & Howell according to the location to which they are assigned. After scanning, operators can choose a specific property from a pull-down list and corresponding keywords are automatically populated from information in the Estate Computer Systems (ECS) Ltd. property management system.

Mail is directly routed to recipients or divisional administrators and the items become part of their work queues. Authorised users can re-index documents, delegate or forward them to other employees, adding confidentiality rules when necessary. If a document is accidentally sent to the wrong location, it can be sent back to a redistribution queue with a note. The system also allows rules to be set up that can automatically handle mail for users who are away from the office or that have left the organisation.

Users who must refer to these documents stored in OnBase can retrieve them directly from the ECS application. Using the OnBase Application Enabler™, fields within ECS can act as hyperlinks to associated documents. Alternately, all documents associated with a property can be reviewed with a click of the mouse.

In the future, Erinaceous plans to use optical character recognition (OCR) technology to further enhance this process. By converting document images to editable text, OCR supports additional automated indexing as well as reducing or eliminating the need for data entry. OCR may also be used to facilitate full-text indexing, which makes it possible to search an entire batch of documents for a specific word or phrase.

AT A GLANCE

A fast-growing provider of property management and insurance services with nearly £152 million in annual turnover, Erinaceous Group’s enterprise content management (ECM) investment has improved its ability to assimilate numerous acquisitions and create cross-selling opportunities while reducing costs and risks associated with paper-based processes.

BENEFITS

- Standardises business processes across multiple divisions
- Protects valuable financial, business and personnel records from risk of loss and unauthorised viewing
- Supports sharing of information between complementary divisions and geographically dispersed business units
- Integrates with multiple line-of-business applications, minimising change management issues for end users
- Improves ability to respond to customer service requests

APPLICATION

- Residential Property Services
- Commercial Property Services
- Accounts Payable
- Human Resources
- Legal and Administration
- Corporate Finance
- Tenant Referencing Insurance Services

ONBASE SOFTWARE

- Enterprise Application Enabler™
- Desktop and Production Document Imaging
- Query, Reverse and Archival API
- CD Authoring
- COL/ERM
- EDM Services
- Document Import Processor
- Document Retention
- Export
- E-Forms
- Integration for Microsoft Outlook®
- Publishing
- Print Distribution
- Virtual Print Driver
- WorkView
- Workflow
- Web Server

COMPLEMENTARY PRODUCT INTEGRATIONS

- Böwe Bell & Howell document scanners
- Fujitsu Europe Ltd. document scanners
- Yardi Systems, Inc. property management software
- Estate Computer Systems (ECS) Ltd. property management software
- Unit 4 Agresso financial software

Protecting Sensitive Human Resources Documents

With nearly 5,000 geographically dispersed employees, Erinaceous manages countless pages of sensitive human resources (HR) documents. To eliminate the inefficiency and inherent risk of relying on paper-based files, Erinaceous' HR Department scans all documents into OnBase using document scanners from Fujitsu Europe Ltd. Due to the potentially sensitivity of these documents, HR teams have their own scanners to protect employee privacy. Indexing values are automatically populated with data from the HR Department's AGRESSO Human Resources suite application. Authorised employees can also retrieve these OnBase documents directly from AGRESSO.

OnBase also helps the HR Department manage items that originate as electronic documents and store them together with the scanned images in a consistent manner. Documents generated in Microsoft Office, for instance, can be automatically saved to OnBase and access and revisions tracked. Employee information received via e-mail can be imported into OnBase simply by dragging the e-mail and/or attachments directly into an OnBase folder within Microsoft Outlook®.

Automated workflows are the next step in streamlining processes in Erinaceous' HR Department. For instance, activities associated with the new hire process will soon be managed using OnBase Workflow to assure that everything from assigning a desk to providing IT requirements is handled in a timely fashion.

Processing Invoice Approvals and Exceptions Without Paper

Automated workflow is already being utilised in the Accounts Payable Department to speed the approval of invoices across Erinaceous' many locations. The group recently acquired a share in a business process outsourcing (BPO) company in India that now manages the processing of invoices for the Commercial Property management division. By August 2006, in excess of 11,000 invoices a month were being processed by OnBase.

The invoices are scanned in the UK and routed to various locations including India, where indexing values are automatically captured from line-of-business applications. Based on levels and rules, personnel there can not only post invoices to the property management and accounting systems but also generate exception and approval processes according to Erinaceous' business rules. For example, if an invoice above a certain amount must be approved by a specific individual, the operator can automatically route that invoice to the approver without the delays or risks of loss associated with shipping documents.

"The system is really working well," Perryman comments. "It really has the potential for rapid ROI and a significant reduction in labour costs."

OnBase is also used in a number of other financial processes. Integrated with AGRESSO Business World, OnBase manages purchase ledger documents as well as supporting automated indexing from AGRESSO. Legal and administrative employees use pre-configured custom queries to access the documents they need by entering unique identifiers.

As a publicly listed company, Erinaceous faces the typical compliance and financial reporting challenges. Being able to document and track processes such as FSA authorisation in OnBase helps to reduce the complexity of validating corporate accountability.

Flexibility and Integration for Dynamic Enterprises

"The business process is always moving," says Perryman. "Inevitably, we finish discovery and we find that we took on another part of it." Fortunately, OnBase is ideally suited for dynamic environments such as that at Erinaceous. Because OnBase is a fully integrated suite that is written on the same code base, it seamlessly combines the full range of capabilities required by the member companies. Hanover Park Commercial Limited's tenant referencing process, for example, requires the ability to capture faxes and then view them in its browser-based HomeLet™ application.

The companies acquired by Erinaceous may have multiple line-of-business applications, but OnBase is able to integrate with just about any of them. "Being able to rapidly integrate with line-of-business applications – and we have many of them – gives end users a common single view of end-to-end business processes. Just being able to work in an application and double-click to get the documents saved an infinite amount of resources; there's no more risk of lost paper or time spent retrieving. Application Enabler is one reason we chose OnBase and a real differentiator. Other solutions just didn't do what it does, and Erinaceous would have spent a significant amount of money to do with another product what OnBase has been able to do a number of times very rapidly."

Point-and-click configurable, Application Enabler can content- and workflow-enable virtually any Web, text, Java™ or host application. Unlike hard-coded solutions, Application Enabler can readily accommodate upgrades to the line-of-business application, reducing disruptions to operations.

According to Perryman, Application Enabler's ability to act as an extension of the business application results in a seamless user experience that often overcomes initial hesitation. Overall, users are happy using OnBase and report that it has "revolutionised" the way they work.

The need to quickly assimilate new divisions is also supported by workflow functionality. "Two companies that were completely separate before can be linked using workflow to standardise business processing," comments Perryman. "Workflow has also helped us understand our business processes better and bring them into line."

The benefits of the OnBase solution aren't limited to Erinaceous employees. In addition to reducing cycle times, OnBase contributes to improved customer service from the ability to answer incoming inquiries immediately to the ability to generate and save personalised outgoing communication from within a customer relationship management (CRM) application.

The ability to automatically publish documents to CDs based on keywords also offers significant benefits. For instance, an ownership change requiring printing of all documents could have required as long as two weeks to complete. Now, OnBase can generate a CD containing this information in minutes. This functionality is also useful when documents must be gathered for auditors.

Erinaceous' goal is to provide its customers with "one point of contact and a seamless service" for all of their property management needs. Similarly, OnBase is intended to be a single solution for an enterprise's end-to-end content management needs – even when the enterprise is as diverse and driven as Erinaceous.

OnBase
a Hyland Software solution

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