



ING LEASE FRANCE

SOLUTION INCREASES COMPLIANCE, SUPPORTS BUSINESS CONTINUITY PLAN

ING Lease offers general leasing (equipment and real estate leasing) in 13 European countries via wholly owned subsidiaries. One such subsidiary, ING Lease France was founded in 1986 and now manages a €850 million business portfolio with one of the widest product ranges for professionals in the market. With eight locations across France, ING France has three divisions, including general asset and vendor finance, real estate lease and structured finance.

In France, these divisions are subject to various legal, fiscal and accounting regulations, such as strict document retention rules that range from 10 to 50 years. Because the main headquarters of ING Lease France is in an expensive office building in Paris, it is not cost-effective to store physical documents onsite, nor does it support a strong business continuity plan. Thus, ING Lease needed easy access and retrieval of documents, a secure and reliable business continuity plan and external storage of required physical documents.

"ING Lease wanted to set up an EDM [electronic document management] solution to align our processes with our business continuity plan," says ING Finance General Manager Wim Steenkamer. "Additionally, our needs were led by the necessary cost management related to physical records management (previously located in our offices) and, finally, the purpose was to offer quick and easy access to electronic images instead of paper folders."

ING turned to OnBase Authorised Solution Provider Recall France, which already had a relationship with ING Lease for document storage services. ING wanted to add contract storage and possibly scanning to its solution and soon found out about the OnBase system through Recall. Developed by Hyland Software Inc., OnBase is an integrated suite of enterprise content management (ECM) software solutions, including core capabilities in document imaging, electronic document management, workflow, COLD/ERM and records management. Recall presented the OnBase system and a strong project implementation plan to ING Lease, which soon decided on the system.

FOLDERS EASE USER ACCEPTANCE

To convert the paper documents to electronic images, ING Lease and Recall worked together to index and scan documents. ING Lease users fill out an e-form with indexing information relating to the documents and generate a bar code, which is also included in the e-form. Recall then picks up the original paper documents each day and prepares, sorts and scans the content. According to information encoded in the bar code, Recall either stores the physical documents for the appropriate retention period or destroys the documents for the end of their life cycles. Recall ensures that the physical documents are traceable and accountable, fulfilling compliance requirements.

The images are then transferred via a secure FTP connection to ING Lease's servers. A workflow matches the e-form with the scanned image based on the bar code value. It then copies the data to the scanned image and re-indexes it as the appropriate document type determined from the e-form. By automatically importing the images into OnBase, ING Lease is able to make documents available overnight so that users can readily retrieve the documents as soon as they come in the following day.

The images are linked to related documents by common keywords such as contract number or client number through OnBase's innate cross-referencing ability. Users can simply double-click on a field within an image, and they are presented with a hit list of each document with the same keyword.

Users also navigate through the OnBase Folder interface. Closely resembling traditional paper folders, a tabbed view allows users in the contract department to get a full view of everything related to a specific contract, just as they could with a paper system. However, the documents are now more easily searchable, more secure and no longer susceptible to loss, tears or misfiling.

AT A GLANCE

ING Lease France has implemented an enterprise content management solution, which significantly reduces costly storage space in its office and supports compliance and business continuity initiatives.

BENEFITS

- Adheres to various strict document retention and compliance regulations
- Aligns business processes to business continuity plan
- Automatic overnight importing for quicker access to documents and less manual entry
- Virtually eliminates need to store files onsite, saving money and office space
- Converted backfile in less than a year for complete business continuity

APPLICATION

- Contracts

COMPLEMENTARY PRODUCT INTEGRATIONS

- Linedata Services EKIP finance software package

(continued)

Further simplifying the solution, users can access the folder view while working in ING Lease's EKIP finance software package. Using Application Enabler™, OnBase creates a point-and-click configurable integration with the application. Users working within EKIP can then click a button, and OnBase pulls up the related tabbed view.

ELIMINATING PAPER SAVES ON STORAGE

ING Lease is also using OnBase to create "a perfectly integrated information system." Using Application Enabler, OnBase documents will not only be linked to EKIP, they will also be integrated with other systems throughout the company, putting documents in the context most convenient for users.

With all of its documents in OnBase, ING Lease would be able to continue to operate even if its office or physical documents were destroyed, helping to maintain a strong business continuity plan. In addition to documents coming in, ING Lease also has entered its backfile of existing documents and contracts into OnBase. The conversion took less than a year and all documents, processed both before and after OnBase, are easily retrieved.

Between the current and backfiled documents, the need to store physical documents in the office has been virtually eliminated, saving significantly on storage and opening the space up for employee use and expansion. ING Lease has also gained faster, more secure access to contract information.

To expand the OnBase solution, ING Lease plans to further integrate with more applications. "Currently, we are in the process of connecting our subsystems to the OnBase system, so that when our staff is working in the ING Lease subsystem, they will have access to all the documents without the need to connect to other systems or paper files," says Steenkamer. "We are even planning to advise the same solution to other business units."



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