

JUPITER ASSET MANAGEMENT



INDUSTRY

Asset Management

THE CHALLENGE

- Need for system where correspondence is filed electronically
- Need for documents to automatically scan into correct SharePoint site
- Need for fast, efficient retrieval of documents
- Need for integrated system that scans and saves into document management and CRM software

THE SOLUTION

- Highly customised technology that can cross reference customer number against customer databases
- Capital Capture SharePoint 2003 Release Script facilitating release of documents into SharePoint

THE RESULT

- Easy access to files
- Faster and more efficient workflow
- Disaster recovery resilience
- Integrated IT systems

Jupiter Benefits from Bespoke Scanning Solution

The Company

Jupiter Asset Management is one of the UK's leading fund management groups, managing investments for both private and institutional investors.

A subsidiary of Jupiter Investment Management Group Limited, collectively known as 'Jupiter', Jupiter Asset Management Limited acts as an investment advisor to the Jupiter range of unit trusts and to the various sub funds which form part of the Jupiter Global Fund.

The Challenge

Jupiter offers a wide range of products to an extensive customer base and the importance of high level account management of that customer base is paramount. With a robust CRM system in place an automation project highlighted the need to implement an electronic filing system, where correspondence could be filed electronically, easily retrieved and used throughout the organisation.

Jupiter utilises Microsoft SharePoint 2003, a web-based technology that allows users to work collaboratively providing easy access to documents, information and people across the business at the touch of a button.

The system manages documents electronically with an infrastructure that enables organisations to share documents, track tasks and email

efficiently. Jupiter has three distinct departments that required ongoing scanning to Microsoft SharePoint 2003:

- Client Management
- Private Client Management
- Finance

Microsoft SharePoint 2003 is set up so that it links with Jupiter's existing CRM system. A unique SharePoint portal exists for each department, with finance having two, and Jupiter required a single scanning solution that would allow the user to scan documents that would then be automatically routed to the relevant department, without the operator having to make any decisions about the document's end destination.

All routing decisions needed to be based upon a pre-created structured barcode header sheet that would prefix each document.

"Jupiter is a very customer focused organisation and the document management and scanning solution we put in place had to work with our systems."

We needed to move away from holding client correspondence manually and towards an electronic process that would complement other technology already in play."

James Taylor, Project Manager
Jupiter



Problems

- Need to move away from paper filing
- Multiple SharePoint sites could cause confusion

Requirements

- Scanning solution with ability to feed into Microsoft SharePoint
- Automated scanning process allowing the scanning operator to be able to scan and walk away
- All departmental and sub-departmental (in the case of finance) information to be ascertained from pre-generated barcode

The Solution

Capital Capture was recommended to Jupiter by another partner who had worked on the automation project.

Capital Capture built the scanning solution around the standard version of Kofax Ascent Capture and Capital Capture's Microsoft SharePoint 2003/2007 Release Script. Ascent Capture accelerates business processes by collecting paper documents, forms and e-documents, transforming them into accurate, retrievable information and delivering it all into the relevant business applications and databases. It offers unmatched compatibility with scanners and other capture

devices, plus content and document management systems, workflow applications and databases.

Capital Capture's Microsoft SharePoint 2003/2007 Release Script provides the connection between Jupiter's scanning software and Microsoft SharePoint 2003. It has easy setup allowing total flexibility, plus a dynamic document libraries feature, powerful site capabilities, extensive logging for audit and investigation purposes and XML and image retention options. It also has integrated Windows security that includes standard image formats and is net based with a visually pleasing user interface.

Kofax Ascent Capture was configured and highly customised to be able to cross reference the customer agreement reference number against the CRM databases, pulling out information such as addresses, dates and other contact details. Part of the barcode indicated the relevant department, and therefore which index fields were required.

The process works in the following way:

- A document is scanned
- Kofax Ascent Capture imports these images and cross references against customer databases
- The Kofax software pulls out the relevant information required for delivery into the correct department
- The documents are converted into PDFs
- The documents are released into the relevant Microsoft SharePoint portal using a custom version of the Capital Capture SharePoint 2003 Release Script

"The beauty of Kofax Ascent Capture is its versatility. Our software designers were able to customise it to meet Jupiter's unique requirements, and together with Capital Capture's own SharePoint Release Script we were able to offer a fully integrated solution, which was one of Jupiter's main requirements."

Mark Kirpalani, Managing Director
Capital Capture

Jupiter has also taken advantage of the support and maintenance provision for the hardware and software Capital Capture offer. Capital Capture's in-house support team can design bespoke support contracts according to the client's needs and also offers the facility of any new hardware being included in one annual contract for ease of administration.



Process after Capital Capture's Solution



Documents
are scanned

KOFAX

Kofax Capture
imports images



Kofax software cross
references against
customer databases
and pulls out relevant
information

CAPITALCAPTURE
intelligent capture solutions

Documents are converted into
PDFs Documents are released
into Microsoft SharePoint portal
using Capital Capture SharePoint
2003/2007 Release Script

The Result

The solution provides Jupiter with a scanning solution that has the technology to scan directly into the correct Microsoft SharePoint portal. This provides a safe and uncomplicated process for users and piece of mind that documents are being filed correctly.

Feedback from staff has been very positive due to the ease of use of the system, and that the documents are so much quicker to retrieve.

The added benefit of the support package has also given peace of mind that trained help-desk staff and engineers can respond to any problems immediately.

Benefits

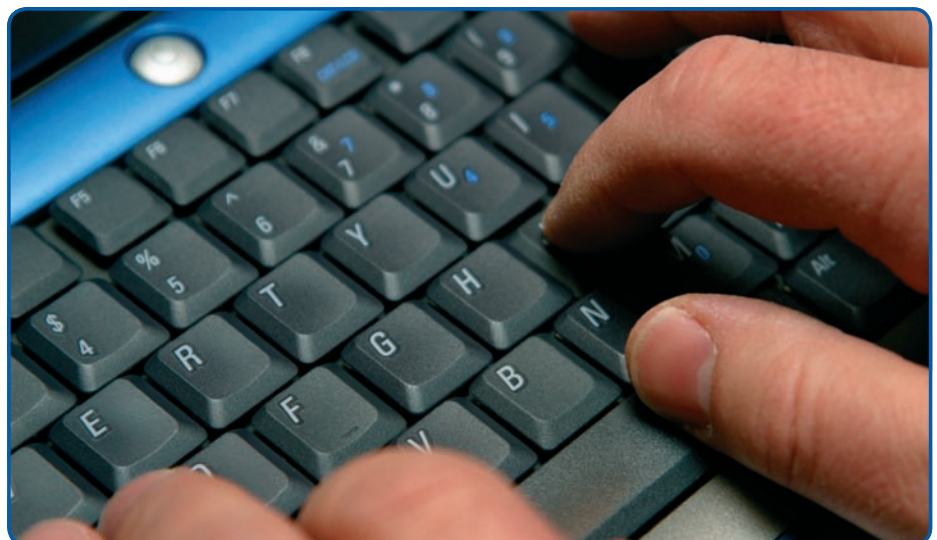
- Easy access to documents
- Much quicker filing and file retrieval
- Documents are automatically attached to relevant Microsoft SharePoint portal without need for user to make complicated decisions about end destination
- Aids disaster recovery plan as documents are safely filed in electronic format

The Future

Jupiter will continue to roll the system out further within the organisation, introducing more integrated scanning/imaging solutions via Capital Capture along the way.

"This solution has been very successful and has provided us with a much more efficient way of scanning. We have worked with Capital Capture time and time again and will continue to do so. Since implementing this integrated process all our documents are now only ever three clicks away."

James Taylor, Project Manager
Jupiter



To find out how Capital Capture can improve your company's productivity, security and streamline business process through intelligent capture solutions please call us on 020 7314 7700 or email information@capitalcapture.com

Capital Capture is a leading independent provider of capture solutions, outsourced capture services, support and scanner maintenance. Our consultancy-led approach enables organisations to reduce costs, streamline business processes and ensure compliance by controlling information from point of entry to point of archive.

Capital Capture serves hundreds of clients in many market industries including banking, finance, insurance, legal, telecommunications, retail, government and public sectors.

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