



Pensions Trust

One of the leading organisations in the highly regulated Pensions industry chose Folding Space to manage a huge library of vital member-related documentation.

Certain industries are bound by regulation and law to maintain a level of record-keeping that would be seem immensely detailed to the vast majority of organisations. Yet, for those dealing with matters of finance, long term record keeping and the ability to search back over historical records is a fundamental part of business practise.

The pensions industry is regulated in just such a way and organisations running pension schemes need to have access to information over the very long term. Archiving has been an issue for many years and in recent times, many have moved from archiving systems based around technologies such as microfiche to digital systems because of the potential for cost savings and access benefits.

One such organisation is The Pensions Trust, which operates multi-employer occupational pension schemes for the charitable, social, educational, voluntary and not-for-profit sectors. Established in the 1940s, the organisation employs around 100 people at offices in Leeds, Edinburgh and London.

A key business requirement

One important recent project has been the back scanning of member-related documents, particularly those relating to deferred or frozen members in case they re-appeared and needed access to their records. These documents could range from a few to a few hundred pages each, and over the course of many years, there are many thousands of pages of documents to be scanned.

Scanning represented just part of the task for the Trust, "It's very useful to have these documents digitised, but subsequently we need to be able to effectively search and retrieve the right document at the right time," said Tim Whitley, Facilities Supervisor at The Pensions Trust.

"We began the project using legacy software but it soon became clear that it was really struggling to cope with the scale of the project," explained Whitley. "We had a range of issues relating to effective scanning and particularly document search and retrieval which had to be resolved in order to ensure that our ability to respond to historical queries could match the high levels of service we provide across the rest of the organisation."

Keeping their previous software solution running was practically a full time job for a member of the IT staff – a situation the organisation was extremely keen to remedy. "While the issues we were facing were causing difficulties, it wasn't just a matter of migrating towards the first solution that came along," explained Whitley.

A carefully chosen solution

Previously, documents were scanned by a third party supplier, the images were burned onto CDs which were then returned to the Pensions Trust. Today scanning is carried out in-house except in the case of high volume jobs which are outsourced to Iron Mountain.

Iron Mountain also played an important role in helping the Pensions Trust to solve their software problem, by effecting an introduction with their partner, Folding Space – a Birmingham-based software development business and pioneer in the development of products designed to seek, find and access documents, files and data.

The evaluation and subsequent installation focused on the Folding Space Content Finder solution, which works by applying what is known as 'symbiotic indexing' - an entirely new approach to network 'search & retrieval'.



The Pensions Trust



The new approach (symbiotic indexing) embodied in Content Finder provides metadata and content (full text) search & retrieval across networked computers - based on distributed computing and local indexing - to enable very rapid and accurate retrieval of documents from any choice of words or phrases.

Content Finder is available on the desktop of every employee, so that if an inquiry is made they can search, for example, via a range of metadata criteria including member number, surname, employer name or box number.

"The solution has helped improve the speed and accuracy of the whole process by a huge amount," explained Whitley. "It has delivered benefits which don't just help with our overall efficiency but also have an impact on customer service," he continued.

In 2007, The Trust plans to extend the process further to scan incoming mail, where Content Finder will also be used to help staff search their daily post.

Folding Space

Folding Space software technology enables users to find, identify, discover, retrieve and manage all the folders, files, programs, documents, emails, images, scans and records across their network. Also, to create, collaborate and route files, documents, records, forms and dynamic data across the network via automated workflows and business processes.

This technology is manifested in a number of complementary software products and applications which can also be treated as software 'modules' or 'aspects' that can be assembled and customized into new products, applications and niche solutions upon demand.

Folding Space has developed an 'intelligent software' technology IPR that is truly unique - **symbiotic indexing** via **distributed computing** allied to a breakthrough in the concept of **intelligent, self aware documents** and **business process automation ('symbiotic intelligence')**.

This world class technology and the resulting products and applications are demonstrably superior to anything comparable providing significant and sustainable competitive edge, both in terms of cost of purchase and cost of ownership.

Folding Space products and applications address various parallel and complementary IT areas:

- o Business process management
- o Document/Records management
- o Document & Email search & retrieval
- o Document & Email Archiving
- o Document de-duplication
- o Document scanning
- o Document workflow management
- o Enterprise-wide intra-mail
- o Forensic document & data discovery
- o Image editing & redaction
- o Intelligent Electronic Forms
- o Metadata management
- o Program asset management
- o Website construction & content management

Products:

- Search & Retrieval
 - **Content Finder**
 - **Desktop Finder**
- Email management
 - **Exchange Finder**
 - **Exchange Archive**
 - **Message & Search Manager**
- Records management
 - **Image Viewer**
 - **Scan Manager**
- Metadata management
 - **Image Tagger**
 - **Document Tagger**
 - **Metadata Manager**
 - **Taxonomy Manager**
 - **Process Manager**
- Document management
 - **Document Workflow Manager**
- Content management
 - **Site Manager**