



FSCU Sees Membership Information in a Whole New Way Using M-Files

“We have access to information that would have been impossible before M-Files and MFSQL Connector.”

- John O’ Mahony

IT MANAGER
FIRST SOUTH CREDIT UNION

Products Used:

M-Files®

MFSQL Connector

Industry:

Credit Union

OVERVIEW:

First South Credit Union is a community-based cooperative that has been providing first-rate financial services to the people of their community for sixty years. They were the first credit union south of Dublin, established in 1960. Their first office was opened in Cork, Ireland and today they have five branches serving over 33,000 members across Ballyphehane, Kinsale, South Mall, and Dillon’s Cross, as well as an Administration Office located in Turners Cross.

GROWING PAINS

In the early days of First South Credit Union, it was easy to keep track of important records. According to IT Manager, John O’Mahony, they never had to think too hard about documents. Files could just be kept in folders and were easy to locate and update.

However, with five locations now, the need for secure and instant access to member information across all locations is essential.

Strict regulation requires evidence of appropriate systems to maintain, keep current, and destroy/delete records when expired. Achieving this with a large hard-copy archive of records is neither practical nor efficient.





TIME FOR A CHANGE

According to O'Mahony, "First South Credit Union is at the forefront of the Credit Union movement, and we pride ourselves on updating our products and services regularly."

Naturally, to accomplish this, FSCU must work with proven, cutting-edge products and services themselves. That's why, three years ago, the credit union decided to implement M-Files. Digital Documents, an M-Files partner specializing in Credit Union services and solutions, engaged LeRoux Cilliers, of Laminin Solutions, to lead the implementation at FSCU. Laminin's MFSQL Connector, along with LeRoux's considerable experience in the sector provided confidence of a successful outcome for all concerned.

"We knew early on that there was an option of doing it without Laminin and MFSQL Connector, but we knew we'd hit limitations," said O'Mahony. LeRoux's understanding of data and data structures gave them the opportunity to look at information in ways they never had before.

SUPPORT MAKES ALL THE DIFFERENCE

FSCU's goal is to support their community, and O'Mahony certainly knows the meaning of support.

"There is a difference between selling a product and supporting a product," he stated.

It was clear to him that Laminin Solutions and LeRoux had the expertise to offer the support the credit union needed. In fact, O'Mahony and LeRoux spent six to eight months digging into data anomalies not just to fix the data, but to understand it better. This was something that couldn't be done with the core banking system. Instead, the information was put into M-Files using MFSQL Connector and explored more deeply in Microsoft SQL Server.

"If we would have gone a different way and not used

Laminin Solutions for M-Files implementation and MFSQL Connector, our experience would have been completely different, and probably not for the better. The more we learn about the products, the more we realize we would have had a far less beneficial experience with someone else."

M-FILES MAKES IT EASY

How has the ability to use member data improved for First South Credit Union? It has saved time and resources for everyone employed there. Important information is now instantly available instead of having to put it in an envelope to mail to another office.

Having data quickly available also helps with compliance and speeds up audits. For example, GDPR compliance requires tracking consent from members. Knowing that consent information is readily available and up to date is essential.

FSCU's ability to answer questions has improved greatly. It was difficult before M-Files and MFSQL Connector to answer questions such as "How many members do we have with up-to-date IDs?" and to validate the answer. And it was difficult to ask such questions in a different way – "How many members do we have with IDs about to expire?" Now, using the power of MFSQL Connector, FSCU can answer the question and contact members in bulk to help keep their records current.

The information was there before, but it was difficult to structure it in a way that supported audit and compliance requirements and allowed the credit union to improve business processing. According to O'Mahony, they are just starting to explore all that M-Files and MFSQL Connector have to offer. With M-Files and MFSQL Connector, along with unequalled support from LeRoux and Digital Documents, they can now access the information and answer those difficult questions. And that's only the beginning.

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Optimize Information | Connect Solutions

Laminin Solutions offers integrated document management and workflow automation products and services that improve efficiency, allowing your business to run smoothly every day. The Laminin team has decades of experience with business, systems, and processes and can help you unlock your business information.