

ELO Customer reference

Berliner Wohnungsgenossenschaft (BWG) eG Nord Ost 77



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Finding information quickly

Bringing order with ECM



“Our whole process control has definitely improved with ELO.”

Dr. Dietmar Lucht,
technical director of the housing association
Berliner Wohnungs-
genossenschaft eG Nord Ost 77

With *ELOprofessional*, the BWG eG Nord Ost 77 housing association archives all its documents in a secure long-term tenancy file system. Connecting the ECM software to the WODIS ERP system, and managing the documents in the central ELO archive enables information to be located and provided quickly. The staff of the BWG have all the tenant-related information to hand, and can then provide much better customer service to their tenants. Workflows also make for a smooth and transparent process flow.

For the BWG, the tenant is king. For the housing association, it is natural to fit the homes on offer to the needs of older members as well as the younger generation, particularly young families. The 1,100 members rely on the services of the staff of the BWG and benefit from individual support.



The solution

practical added value



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Secure long-term archiving

Overview

Country: Germany
Industry: Real estate

The company

The Berliner Wohnungsgenossenschaft eG Nord Ost 77 manages 917 homes in the suburbs of Marzahn and Höhenschönhausen. The housing association currently supports 1,100 tenants and owner-occupiers.

The challenge

Implementation of an electronic tenancy file. Connection with the WODIS real estate management software from Aareon and integration of the Tobit.David fx e-mail system. Digitised paper files. Optimised process control and information provision within the company. Electronic incoming and outgoing mail logs with workflow-driven distribution of documents.

The solution

With **ELO**professional, all tenant-related master data and documents from WODIS are combined in **ELO** with the existing paper filing to form a tenancy file system. The central inbox and outbox are managed completely electronically.

The benefits

Information relevant to the transaction is available to the staff quickly. Customer service has been significantly improved with direct information provision. The details are retained in the long-term **ELO** archive as required by law. The whole process control has been optimised with the introduction of the ECM system.

The association was established in June 1977 as the 'AWG Ingenieurhochbau Berlin'. It changed its name to 'Berliner Wohnungsgenossenschaft eG Nord Ost 77' in November 1991. The company now manages 917 homes in the Berlin suburbs of Marzahn and Höhenschönhausen. 10 employees currently look after members' needs.

Before the introduction of the Enterprise Content Management (ECM) system, document management at the BWG relied almost exclusively on paper files. Individual employees also maintained their personal filing in the Windows Explorer file system. With 917 homes and 1,100 members, this system soon reached its natural limits, as technical director Dr. Dietmar Lucht confirms: "Although we are a relatively small housing association, the scale of our transactions should not be underestimated. To keep our processes running smoothly, we decided to introduce an ECM system. As well as the centralised availability of information, a key aspect was to provide secure long-term electronic archiving, as we have to retain our documents for many years."

In the summer of 2009, the association looked at a number of ECM manufacturers and finally opted for the **ELO**professional software from ELO Digital Office GmbH. Along with the best price-performance ratio, one of the main criteria for the decision was the ease of use of the system. As Dr. Lucht explains: "Most programs from other manufacturers were very abstract and demanded additional IT knowledge, which we did not want to impose on our staff. The **ELO** user interface, with filing cabinets, folders and indexes, won us over completely and made it much easier for our staff to get to grips with electronic working."



Rethinking the processes

To help to deploy its ECM solution and realise its objectives, the BWG looked for the right business partner on the **ELO** website, and found one. At the beginning of January 2010, a test system was installed, which went live as early as mid-February. Another gold star for the **ELO** business partner, as Dr. Lucht emphasises: "We are very satisfied with our choice of **ELO** business partner to support us. Thanks to their geographical proximity, the **ELO** specialists are right on the spot when any issues arise. And thanks to the excellent cooperation across the whole **ELO** business partner network, we benefit from the extensive knowledge of the other partners to come up with quick solutions."

Staff training was also individually tailored by the **ELO** business partner and adapted to the different work areas, which further increased acceptance of the solution. Dr. Lucht again: "The individual training kept the training costs for the staff relatively low. Our employees were initially assisted at their own workstations. This strengthened the effect of 'learning by doing'. Any initial resistance, which often surfaces with changes to working processes, went away very quickly. We are now working very comfortably with **ELO**."

Important preparatory work

Before introducing the **ELO** ECM system, the project managers at the BWG took a very close look at the existing business processes and started off by restructuring them, as Dr. Lucht recalls: "An ECM system provides us with the basis for more efficient working. But this basis has to be used and so it is important to think about the process flows, set up the right standardised structures from the outset and, where necessary, redefine them. That is the only way to get the best out of the system."

The existing filing maintained by the staff was gradually replaced, and the data now finds its way directly from Windows Explorer into the **ELO** archive, with a click of the mouse. This is mainly general correspondence, but strategic documents, documentation of the process organisation and legal regulations are also transferred to the archiving system according to a new filing plan. A considered approach to transferring the data into the ECM system is essential here, according to Dr. Lucht: "It will certainly be a month or two before all the data from the file system has been stored in **ELO**, because we are not moving the documents blindly into the archive but looking at them closely first to decide whether they actually need to be archived and if so, where in the archive they belong. Despite the cost and effort involved, this process is very important if we are to reduce our filing and keep it tidy in the future." All current documents that require filing have been securely stored in the **ELO** archive since 1 January 2010.



Connection to WODIS

Before the **ELO** archiving system was introduced, the traditional tenancy files were managed in physical folders, from the higher-level economic units through the various buildings down to the individual tenancy files. The folders contained a multitude of different documents such as contract files, rent adjustments and direct debit authorisations, as well as documents on deposits and securities and other payment agreements.

All commercial data such as invoices for heating and operating costs are managed by the BWG using the WODIS real estate management software from Aareon. A major aim of introducing the ECM system was to provide the staff with all the data centrally and in the relevant context. That is why the tenant master data from WODIS have been combined with the paper filing into a tenancy file system in the **ELO** archive. The information from WODIS passes through an interface into the **ELO** index form and then, in conjunction with a pre-defined document filing logic, automatically generates the specified structure in the archive. The business partner also used the extensive know-how of the **ELO** partner network, and enhanced an existing interface to WODIS together with another **ELO** business partner, to be seamlessly integrated into **ELOprofessional**. Data reconciliation before transferring up-to-date tenancy data between the two systems can be performed manually by the staff at any time.

The legacy details from the paper filing are currently checked for relevance by the BWG staff before they are scanned into **ELO**.

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The solution

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Electronic incoming mail

“For us, the ELO ECM system is a constantly growing system, with which we will certainly exploit further potential for optimisation in the future.”

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Workflows for manageable processes

The BWG decided at a very early stage to have its process controlled by an **ELO** workflow. All the incoming mail is therefore scanned in centrally via the **ELO** mailbox by one member of staff at the BWG, and then sent to the management via a standardised workflow. The management then distributes the mail to the employees concerned, which takes just a few mouse-clicks. Processes like requests for repair work, complaints management and renting out apartments can now be tracked transparently within the **ELO** archiving system. For example, where a prospective tenant calls the housing association looking for a flat, or a new tenancy agreement is signed, these transactions are now clearly documented and entered directly into **ELO**. For Dr. Lucht, the status of a transaction can be viewed in **ELO** at any time: "Thanks to the integrated workflow, we can now see much better what status a transaction is currently at, and which way our documents have gone. It is also possible when assigning tasks set a reminder date at any time. Our whole process control has definitely improved with **ELO**. In the future, we would like to go beyond the current control of the process flow to handle associated more complex tasks and process using workflows."

The tenant is king...

with this in mind, the BWG has used the deployment of **ELOprofessional** to improve the efficiency of its work substantially and expand its service still further. Where the staff of the BWG Nor Ost 77 previously spent a lot of time and effort locating the relevant documents to answer telephone queries from tenants, they can now find all the important information on a tenant centrally, and pass on the information immediately.



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Future-proof and sustainable

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Enhancement steps

“For us, the **ELO** ECM system is a constantly growing system, with which we will certainly exploit further potential for optimisation in the future”, says Dr. Lucht of the prospect of further project phases and requirements with **ELO**. Thought is currently being given to expanding e-mail archiving. The Tobit.David fx e-mail system is already connected to **ELO**, and the staff can decide for themselves whether e-mails should be archived or not. The project managers hope to reach a strategic decision on e-mail communication and archiving in the near future.

The BWG is also considering whether an electronic billing process using **ELO** is feasible. Because Dr. Dietmar Lucht is sure of one thing: “The proportion of electronic invoices to be processed by the BWG will increase significantly in the future.”