



Document Management Case Study

Federal Credit Union

Organization Overview: AMI's customer is a member-owned and controlled not-for-profit **financial institution** organized to promote thrift and provide credit to members, with three branches in the Twin Cities metropolitan area.

Initial System Usage: This credit union originally looked into getting a document management system as a way to **reduce the amount of physical storage space** they were using to store documents, many of which have a seven-year retention period. They were also very interested in finding a way to get **quicker access to documents**. They had looked at various imaging systems on and off for about ten years. One of the key factors that caused them to select an imaging system through AMI was that the new system was “**intuitive – it just made sense**”.

Current System Usage: The credit union currently uses their document imaging installation for basic scanning, indexing and retrieval of **membership applications** and **photo identification cards**. They also store images of the **checks** processed by each teller on a daily basis, as well as **deposits, withdrawals** and **transfers**. Accounts Payable and Human Relations also store documents related to their areas of responsibility. The tellers use a scanner provided by AMI which has three programmable buttons. Each button is set up to scan to a different area in the document imaging system.

Future System Usage: This AMI customer is considering a variety of other types of documents to store, such as cashier checks, old membership cards, share certificates and safe deposit box leases.

Summary: The head teller at this credit union's main branch finds the document imaging system as a whole to be “**very helpful**”, noting that it is “**much, much quicker to retrieve items**” than it used to be. He has had instances where a member has called with a question about a particular item and he has been able to “**call them back in minutes instead of hours.**”

About AMI Imaging Systems: AMI has been serving customers and solving business problems since 1982. We are an industry leader specializing in Document Management Technology and Workflow and Process Automation. AMI's customer base includes both large and small customers. We are dedicated to serving customers with a full understanding of their business needs.

