

# OBS Success Story

## CPS Credit Union



### The Portal Solution

#### Overview

CPS Credit Union, South Australia's third largest credit union, needed a central point of reference that connected employees with up to date policies, procedures and forms quickly.

In 2005, CPS introduced the "iWay". Employees have been empowered to easily update "iWay" and ensure that future documentation meets CPS standards. Nintex SmartLibrary has delivered peace of mind ensuring compliance is attained in a highly regulated industry.

#### More Information

CPS offers a range of financial services to more than 92,000 members from nine Personal Financial Centres in metropolitan Adelaide and centres in Port Augusta and Victor Harbor. CPS' core values are based on helping members achieve their individual lifestyle goals and financial success.

CPS was attracted to OBS due to proven solutions success, as well as the complementary products division, Nintex. CPS' existing document management system had no document version capability, no review process to ensure content was current, required editing and publishing using different applications and the system had limited control over CPS style standards.

To meet the needs of the entire organisation, CPS decided it needed a single solution that offered centralised content management and administration, site-wide search and displayed latest published documents. OBS designed and implemented a Windows SharePoint Services site known within CPS as the "iWay".

OBS enhanced "iWay" with Nintex SmartLibrary which extends Windows SharePoint Services to offer a robust document management system fully integrated with MS Word. Central management of workflow approvals is managed through a user friendly interface and complimented with audit logging.

The solution included configuring WSS to operate as a master slave arrangement through the creation of a restricted Authoring site, where document content is edited and approved and subsequently published to a secondary site known as the Published site which is accessed by all staff. This has met both internal corporate requirements and other external regulations.

"iWay" has empowered CPS employees with a central point of access for knowledge plus the scalability to support future capacity requirements.

<http://www.cpscu.com.au>

