



“ HG Technology took the time to understand our processes and the requirements that we had, took these on board, showing their experience and expertise to make suggestions that we would find beneficial. Overall, they created a highly effective cloud based document management system for Salix Finance. ”

*Abdul Kamil, Senior Business Analyst*

Salix Finance provides government finance to public sector organisations for investment in energy efficient and low-carbon technologies. Before working with us, their documents were stored on a physical server, located in their central London office. Once the pandemic hit, and working from home became the new normal, Salix decided it was time to move to a cloud based document management system.

Having taken the time to get to know the organisation and the users themselves, we concluded that SharePoint would suit their business needs, offering a user-friendly yet highly effective document management system. Having a large number of documents, we made sure to discuss the structure of their system to ensure that it would meet their requirements.

Following on from discovery, we picked up on Salix's collaborative working practices, to then tailor the user experience to be more streamlined in navigation. This included data lists, quick links, meta data and more.

We used the relevant transfer tools to guarantee that all of Salix's existing documents were transferred to SharePoint successfully. Moving their documents to the cloud, and making them easily accessible, means that their users are now able to access files whenever and wherever they may be, making working from home much easier. Salix Finance has greatly benefitted from a cloud based document management system.