

L-BANK: AN INVESTMENT IN YOUR OWN FUTURE - MACROS IN-BOX & E-DOSSIER

Coordinated collaboration between several administrators presents immense rationalization potential. To do so, a dossier with the appropriate documents must be reliably transferred from one workspace to the next or entered into the hold dossier. Macros in-box and e-dossier Manager provided employees at L-Bank with an extensive spectrum of features for efficient processing. Macros e-dossier Manager enables the intuitive compilation of case-related documents. Macros in-box organizes processing sequences. Easier handling and increased flexibility have led to a high degree of acceptance among employees. More efficient processing has meant better customer service, resulting in higher levels of customer satisfaction and increased productivity with simultaneous cost reduction.

IN THE FOREFRONT

Past IT solutions often only supported administrator features at one work station. It is becoming increasingly obvious that future rationalization potential lies in the improvement of collaboration between several administrators who work together on one specific task. Such processing methods extending across several work stations are particularly popular with insurance companies and banks, but are also implemented in other organizations.

To enable coordinated processing, a dossier with the appropriate documents must be reliably transferred from one work station to the next or entered into the hold dossier. The processing status must be available at any time to be able to provide information in the case of inquiries.

In order to achieve IT-supported application processing, L-Bank was looking for an integrated, comprehensive solution that could handle the application processes together with the related documents, as well as their management and archiving.

SOLUTION

Macros Reply has implemented a comprehensive document processing solution within the framework of the project. In addition to the new in-box component, L-Bank's all-in-one solution gives users a wide range of features for efficient processing:

- Registration of incoming correspondence and documents
- In-box solution for organizing processing into individual steps
- Integration of processing with existing host solutions via terminal emulations
- E-dossier Manager for combining all case-related documents required for a certain process
- Text processing for creating individual and bulk letters
- Print job management for correspondence and documents
- Storage of all documents in an electronic archive
- Account statement archiving

In the implementation, Macros Reply used partly its own or third-party ready-made components and created certain individual parts from new. Document creation was based on a Kodak scanning system, while all management and processing features such as storage, review and attribution, as well as adding memos, and/or hold e-dossiers were created by Macros Reply. Connection to the host system was performed through a terminal emulation.

Macros e-dossier Manager is part of the current Intranet and enables the organisation of case-related documents into one dossier. Dossier contents are displayed to users via a directory or thumbnail view for optical selection.

L-Bank's innovative text processing system was integrated into the solution so that it could be used as a tool in the Intranet portal, while data management took place entirely within the context of the solution. Print job management uses Adobe standard software for formatting and prints documents with corresponding format overlay at the work station.

At the heart of the application is the Macros in-box, used for organizing the processing sequence for individual tasks. During established operating procedures, processes are blocked for unauthorized users during handing, sent to another administrator along the workflow path, dropped into the administrator's hold dossier and process approvals are initiated. Individual operating procedures are predefined when they need to meet certain rules. However, they can also be specified by users, for instance within an approval process, if the user realizes how the dossiers should be further processed only after working on them.

The workflow solution enables the enterprise wide delivery of processes and dossiers to the responsible employee according to the status of the documents or processes. The workflow's high degree of flexibility improves and simplifies overall customer service. The fast, up-to-date and enterprise-wide provision of required data ensures integrated, organized and smooth working processes, thereby also considerably

increasing productivity.

Document processing makes it possible to create dynamic documents from currently valid templates during processing requests. Administrators have access at their work stations to standard Microsoft tools such as MS Word for processing correspondence.

The browser-based solution offers centralized management for all forms, document templates and text components so that administrators can compile texts and modules and make changes only in certain places for the purpose of adding individual formulations. Legally-binding texts are protected and portfolio data is automatically added. The result is maximum security, minimum operating expenses and immense flexibility for administrators.

Form management offers enterprise-wide, standardized templates for various processes for all types of documents and protects access to the current form versions. It guarantees correct client contractual relationships and ensures proper document processing according to user rights. Forms and text contents are defined and made available at a central location by authorized administrators, ensuring proper adherence to enterprise-wide layout specifications, simplifies and accelerates the creation of new forms and monitors their validity.

The internal redirection of processes is completed in the outbox via the in-box. In order to optimize mailing costs, letters to be sent to customers are compiled from several components such as standard letters, policy change notices and forms; they are then presented to the administrator upon request for a final inspection. Modifications can be made to permitted sections. Processing remains flexible and application handling is made as efficient as possible.

Document orders are retrieved from the outbox, checked for content and data consistency, and combined with templates and required formats in preparation for printing via the print manager. Variable values are used in the required target formats and sent as a TIFF or PDF file according to the means of transmission. Letters can be sent as printed letters, faxes or e-mails. Letters can either be printed at the work station or via central printers; the printed output is transaction-proof, meaning that no documents can ever be lost in the case of errors. Documents with corresponding attributes are simultaneously sent to and archived in the DMS. Confirmation of successful document forwarding is noted in the customer history and a To-Do list is created for the response.

The innovative solution of print output management simplifies the use of all print job processes. It allows the user or underlying application to send print jobs to printing stations, such as work station printers, department printers or high-speed printers. The system also supports bulk print jobs through the browser environment. Print job Management takes care of each specific format using Adobe and other formatting systems in PCL format, without the user noticing any type of difference or having to take further action.

The print job is sent to the central print spool via the web server and printed out to the individual printing stations through corresponding drivers. In providing the output of print data from host or UNIX environments, drivers read the print data from each spool file and transfer it to the central spool.

For final printing preparation, data from various spool files can be merged and additionally post-formatted in order to provide forms, for example, via the JetForm System. *“These solutions were able to make handling processes considerably more reliable and faster”*, Dieter Weick, Director of Information Technology Services at The L-Bank. Optional post-processing print output options are also available. Printing from the central print data is monitored via the spool by saving the conformation of successful printing. That gives users control of print jobs through the central spool: they can start or stop the printer, reroute jobs in the case of defective printers, use several printers at one time for higher efficiency, delete versions or print again.

A key function is the archiving of print data, the audit-proof storage location for later access and high volume printing. Documents are archived on EMC² storage systems via the existing DMS solution. Finally, Macros Print Management software accepts account statements as a bulk print job from the print file and saves them in a central archive.

The new solution offers substantially simplified operation, as well as increased flexibility and functionality for users. Experiences using the system during its initial months produced outstanding results, making it easy to decide to expand the functionality in terms of post-processing options in a second expansion stage.

In order to implement its comprehensive solution, Macros Reply used various existing modules according to the component-based approach, meaning that very few functions had to be implemented on a customer-specific level. The fully executed functionality was completed within one year and introduced in a pilot stage. Macros Reply faced a number of technical challenges that required times of intense dedication, but which were ultimately successfully mastered.



Macros Reply uses innovative software to make corporate processes more efficient: The employees of Macros Reply have high degree of technical competence as well as industry and process-specific knowledge, which is reflected in every product. This is also the company's most important unique selling point. In conjunction with the configured standard products and expansion modules, Macros Reply offers its customers the exact solution reflecting individual business processes. Instead of wasting time with the search, distribution or the processing of information, Macros Reply helps in-box and e-dossier customers process their work, from the in-box to the outbox, or research and coordinate their information across the organization with the DMS intranet – and always purely browser based. After all, Macros Reply, which was founded in Munich 1999 and has an office in Hamburg, is an internet pioneer.