

SERVICE OFFERINGS

FINANCIAL SERVICES SOLUTIONS

Deep expertise in different areas of financial services especially in deploying content management solutions.

MIGRATION SERVICES AND UPGRADE

Migrate documents and content from File shares, IBM FileNet, Humming Bird, Live Link, Share Point and other repositories into Documentum. Upgrade any version to 6.5.

PUBLIC SECTOR SERVICES

Process automation for complex approval mandates. Provide modernization for legacy applications including process and system re-engineering using bespoke applications or COTS products.

PROJECT MANAGEMENT

Create Enterprise Content Management strategy across the enterprise and manage the project, communication on a global scale including onshore and offshore resources.

WEB CONTENT MANAGEMENT

Implement web 2.0 Websites using Documentum's Web Content Management tools. Design site navigation and page layouts with taxonomy structure and Create standard XML and Pagebuilder templates for authoring and viewing the content. Provide standard workflows to author, approve and publish content automatically to staging and live sites.

OTHER SOLUTIONS

- **InSight** – Zero-Install Office Access
- **AutoCite** – Automated Citation Generation using XCP
- **SmartFolder** – Metadata and Role based folder structure
- **Pitch/Deal Book** Management

FINDOCS: ONBOARDING SOLUTION

AUTOMATED SOLUTION TO HANDLE ONBOARDING USING EMC DOCUMENTUM

BACKGROUND

Any organization has processes for on-boarding new clients, new vendors, new employees and new accounts. Most of these processes are still manual due to the need for integration and communication seamlessly with internal and external systems and customers, complex security and access requirements and elaborate validation and decision making process to on-board or reject a request.

SOLUTION OVERVIEW

COSI's NAOP solution is built on EMC Documentum's Enterprise Content Management Solution. It uses the best practices, automates and streamlines processes, reduces cycle time and provides the capability to deliver most of the features fairly easily and quickly. Pre-defined groups, roles and ACLs ensure well defined responsibilities for different actors within the process flow.

Process flow and forms are pre-built using Process and Forms builder respectively and can be altered to meet specific customer needs. Dynamic checklist and package generation capabilities including the ability to override the checklist with mandated approvals are provided. Customer dashboard and browser capabilities enhance the transparency and provide cross-selling opportunities.

TECHNICAL ARCHITECTURE

- Content based workflows built using BPM
- Email and Scan Integration using a staging approach for tagging
- Multi-tiered architecture with web services to access the Documentum repository
- Automated generation of acceptance letter using XML templates
- Portal-based interface using JSR168 compliant portlets

BENEFITS

- Reduce overall processing time.
- Provide integration with legacy systems both upstream and downstream
- Content based workflows, with the ability to manage multiple versions of the documents
- Ability to track, measure and optimize performance
- Effective queue management to ensure resources are optimally utilized
- Email and Scan integration to ensure multiple channels for automated document capture
- Templated output management to print acceptance and rejection letters

CONCLUSION

The pre-built solution helps in establishing a wider usage of EMC Documentum suite of products across the enterprise and can be extended to build any multi-step process oriented solution. The overall deployment time frame will reduce significantly and will optimize the cost and effectiveness of a content management solution overall.

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