



THE ESSENTIALS

Industry

Financial Services

Company Size

600 employees

Challenges

- Search results could yield hundreds of possible documents, slowing efficiency
- Configuring user policies required expensive software coders

Results

- Speed searches of archives holding millions of objects
- Saved 500,000 Swiss francs compared to alternative solutions
- Ensured regulatory and legal compliance by supporting required retention periods

Solutions

- EMC Documentum enterprise content management
- EMC Documentum D2

LARGE GLOBAL BANK

Speeds information access in multiple departments and saved 500,000 Swiss francs with EMC DocumentumD2

The mission of this global bank is to serve central banks in their pursuit of monetary and financial stability, to foster global cooperation in those areas, and to act as a bank for central banks. Its organization consists of a head office in Switzerland and offices in Hong Kong and Mexico.

BUSINESS CHALLENGES

The large global bank personnel rely on millions of legal, financial, and regulatory documents to conduct business for their global central banks. The bank was facing challenges with its content management processes because documents were stored in an uncontrolled environment.

"Everyone was storing their documents on shared drives. This resulted in inconsistency, duplication of information, and an inability to quickly and efficiently search for documents using in-house developed taxonomies," explains the Document Product Manager, at this global bank.

To overcome these challenges, in 2002 they deployed the EMC[®] Documentum[®] enterprise content management solution across eight departments and 26 business units. Eventually, with the number of archived documents growing into the multi-millions, the global bank needed an upgrade to address issues such as large number of results for searches.

The bank turned to EMC to find a user-friendly solution to support efficient record management practices and collaborative activities. Specifically, the bank wanted to improve the client user interface, improve access to relevant documents, enforce document tagging, and fully support document archiving.

SOLUTIONS

To address its challenges, the bank deployed EMC Documentum D2. This innovative, intuitive web-based interface delivers easy content navigation allowing users to instantly identify and view document content through their web browsers. Today, a total of 600 staff, including Hong Kong and Mexico-based employees, access files quickly using Documentum D2.

FLEXIBILITY

Prior to implementing Documentum D2, the bank would have to hire specialists to alter code in order to meet individual access and security needs. Now, this Global bank's staff can easily create security policies using the solutions' configuration matrix.

"With D2, you choose what policy options you want for specific people and their responsibilities, point at the option within the configuration matrix, click a mouse, and it's done," says the Document Product Manager. "When users login to Documentum using their password, security policies are automatically activated ensuring that only the right people can see and access documents that are related to their work."

DOCUMENTUM MANAGEMENT FOR EFFECTIVE COLLABORATION

EMC Documentum D2 also provides the bank with methods to quickly match documents to specific users and activities for increased productivity. For instance: they create new committees to address bank activities and requirements. Relevant documents are also tagged appropriately in the system.

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Document Product Manager
Large Global Bank

Using this method, committee members can quickly access appropriate documents, ensuring that all relevant files are at their fingertips for increased collaborative effectiveness. "Documentum definitely speeds up decision making by ensuring that relevant documents are always available," the Document Product Manager notes.

EFFECTIVE DOCUMENT SEARCH

One of the primary reasons Global bank chose to adopt Documentum D2 was to speed the document search process. As the Document Product Manager points out, "In one of our document repositories, we store about four million objects. In another, it's three million objects. And they're growing on a daily basis. Documentum D2 has doubled our performance in terms of searches compared to older methods."

COMPLYING WITH REGULATIONS

As a financial institution, the global bank must comply with a wide range of regulations and ensure that documents meet required retention periods. EMC Documentum D2 enables this bank to comply with these regulations by providing support for the bank's new records retention and archiving procedures, and security classification policies.

"We have the benefit of auditing tools in our EMC solution, which meets all regulatory and legal requirements because it provides a solid, well-controlled document management system," says the Document Product Manager. "With D2 we have a good user interface that more popular with the end users than previous clients. It's fast and provides good performance."

Documentum and Documentum D2 have significantly increased staff efficiency and productivity, resulting in internal savings. The bank has retired older Citrix boxes. The cost of Documentum D2 was also much less than other options.

"We saved 500 thousand Swiss francs alone due to Documentum D2 configuration capabilities, and at least six months in development costs, compared to what it would have cost had we gone with another alternative," explains the Manager.

Documentum D2 will continue to benefit the bank. Inherent flexibility and agility simplify the deployment of new versions of the D2 client or new document management processes and policies.

"With Documentum D2, it is much easier to plan for the future," says the Document Product Manager. "Documentum D2 built-in flexibility is the key to our success."

CONTACT US

To learn more about how EMC products, services, and solutions can help solve your business and IT challenges, [contact](#) your local representative or authorized reseller, visit www.emc.com, or explore and compare products in the [EMC Store](#).

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