HTC Global Services, Inc.
New Accounts Processing and Content Management Solution

Partner Solution

■ *Target Industry*
Banking and Financial Markets

■ *Business Application*
New Accounts Processing

■ *Products*
IBM FileNet Business Process Framework
IBM FileNet Business Process Manager
IBM FileNet Content Federation Services
IBM FileNet Content Manager
IBM InfoSphere Enterprise Records

Business Challenge

Banking institutions require integrated, automated workflow solutions that effectively and efficiently process new account requests. When it comes to integrating content management systems with enterprise resource planning (ERP) and other line of business applications, banking institutions face significant challenges and costs when it comes to integrating new document types and disparate information silos. Additionally, many solutions fall short of fully supporting the entire document lifecycle – from document loading, search/retrieval and version control to archiving and security.

This lack of integration and support presents many issues with respect to records management, processing efficiencies and overall cost savings. The inability to flexibly capture documents in a centralized/de-centralized fashion introduces processing inefficiencies and redundancies in terms of storage, workflow and archival. The absence of integration also increases maintenance costs and can introduce manual processes into the mix, negating many of the benefits afforded by document management solutions and making it difficult to meet legal and regulatory requirements. Additionally, these sub par workflow solutions offer limited control and tracking capabilities, thus increasing overall operational costs.

Solution

HTC's New Accounts Processing and Content Management Solution is a Web-based offering that manages all document-centric business processes for new account processing. On the front end, the solution supports document capture, enabling banks to scan, receive, process and store faxed or emailed documents; which allows for fast and easy search and retrieval.

The solution offers configurable work queues and business process workflows to manage new accounts, handling trailing documents, review and validation, reports and court documents. In addition, it provides a central repository to manage documents for various business groups within the bank and meets all legal and regulatory compliance and retention policies.

By leveraging a service oriented architecture (SOA), seamless system integration and collaboration with other applications is enabled. The solution provides "software agents" for document and data exchange with external systems. The IBM Enterprise Content Management (ECM) suite of

product's out-of-the-box features are leveraged to enable business managers (rather than developers) to quickly configure and deploy new document types, document attributes, work queues and business process workflows.

Value Proposition

HTC's solution streamlines and automates new accounts processes for improved efficiencies and reduced accounts processing time. The solution is designed so that other products, line-of-business or business units can be brought online, with the necessary business specific requirements implemented, without significant effort or impact to existing system users.

Using the HTC solution, organizations can achieve the following benefits:

- **Infrastructure consolidation** – A significant amount of cost savings can be realized by consolidating infrastructure distributed among various business units, and from consolidating resources, storage, network bandwidth and licensing.

- **Process efficiencies** – IBM ECM provides a means for improve existing business processes, making them more efficient and cost effective.

- **Streamlining information access** – A central source for all documents makes it easy to capture, store, search and retrieve documents in the enterprise and enables document linking where documents may be tied to disparate systems.

- **Integrated content repositories** – In migration and mergers/acquisition scenarios, the use of IBM ECM provides the means to quickly add an external content repository to the enterprise data store. Such documents can also be easily accessed by existing applications. It also provides streamlined document structure and organization, making it easier for applications to integrate and use the IBM ECM programming interface to seamlessly access documents.

- **Reduced risk** – Supports a centralized governance model to reduce the legal risks by implementing ILM and associated processes effectively.

Company Description

HTC Global Services, Inc. is a leading CMM Level 5 certified Information Technology (IT) solution provider. Founded in 1990, HTC is headquartered in Troy, Mich., staffed with more than 3,000 highly qualified IT professionals working across global delivery centers in North America, United Kingdom, India, Australia, Malaysia, and China. It offers information technology services, solutions, products and BPO services in publishing, government, automotive and manufacturing, healthcare, insurance finance, retail and technology sectors.

For more information, please contact:

Girish Arora

+1 248 530 2527

girish.arora@htcinc.com

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of this solution:
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