

Gothaer Group cuts out paper with IBM DB2 Content Manager on System z



Overview

■ The Challenge

Paper-based workflows were costly to support and slow to adapt to new business needs. Gothaer Group wanted to enable more efficient processing of documents, offering greater business flexibility and reduced costs by eliminating physical document archives

■ The Solution

Worked with IBM and other partners to create an enterprise-wide document management solution, including scanning and workflow elements, to process all incoming and outgoing documents; deployed IBM DB2® Content Manager for z/OS® and IBM Lotus Notes® software to manage, route and archive electronic documents

■ The Benefit

Faster and easier retrieval of documents; clearly defined and automated document workflow enables a more responsive business; reduced costs through elimination of manual document processing and archival; move to electronic document archive will facilitate any future office moves, enabling greater business flexibility; stable and robust IBM System z™ platform offers optimal support for business-critical document management processes

The Gothaer Group is a major German insurance company headquartered in Cologne. With more than 3.5 million customers and around €3.8 billion annual gross premiums, the group employs just over 6,000 people and offers a wide range of insurance products, including property, life, health and car insurance. Gothaer's information technology systems are serviced by a wholly-owned subsidiary, Informationsverarbeitung und Dienstleistungen GmbH (IDG), which has 600 employees.

The insurance market is changing rapidly and constantly. To stay competitive, Gothaer must be able to redesign business processes and internal workflows quickly and at low cost. With largely paper-based systems, the company lacked flexibility and speed and could not easily undertake a planned consolidation of outlying offices to central sites.

By introducing IBM DB2 Content Manager for z/OS on its IBM System z mainframe platform, IDG created a comprehensive document management solution that has enabled Gothaer to all but eliminate paper-based archives and manual administration.

Hans-Georg Pusch, Product Manager CMS at IDG, comments: "Gothaer is moving towards a more centralized organization by consolidating

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functions that were previously spread across numerous branch offices. To support this move, we needed to enable documents to be captured electronically so they could be shared instantly between all parts of the organization. IBM DB2 Content Manager enabled us to build a robust solution quickly and on our preferred platform — IBM System z.”

Sharing information with IBM DB2

With an organization that was reliant on paper documentation, Gothaer could not easily or quickly share information throughout the group. As a result, the group was fragmented into operational silos, with each office location requiring specialized employees for every function. Gothaer wanted to take advantage of economies of scale by splitting out the business processes and creating centralized functional departments — so that, for example, a single call center could handle all enquiries and steer them to the appropriate centralized back-office function.

It was also difficult to re-engineer the existing manually controlled workflows in response to competitive pressure, and the cost of running paper-based archives was high.

Working closely with IBM specialists, IDG designed an electronic document management solution based on IBM DB2 Content Manager for z/OS, with IBM Lotus Notes, Chordiant and IBM WebSphere® as the front-end application platform.

The solution is integrated with third-party scanning, optical character recognition (OCR) and fax-capture software tools, enabling Gothaer to capture and store more than seven million documents annually, totalling more than 20 million pages.

Says Hans-Georg Pusch: “Our main criteria for choosing the new solution were total cost of ownership, performance and integration with existing systems. We wanted to run the document management environment on our IBM System z mainframe because it fulfilled these criteria, as well as providing very high reliability, availability and security.

Paper cuts deliver lower business costs

The new electronic document management solution supports insurance clerks in routing and archiving documents through typical business processes such as underwriting and policy administration.

Gothaer scans all inbound mail for the life, car and health insurance businesses and then manages it in IBM Content Manager for z/OS, which uses IBM DB2 for z/OS for data management. Incoming faxes are captured and routed into Content Manager, and all the raw data itself is stored on magnetic disk and IBM 3995 optical storage.

Gothaer plans to bring all of its SAP documents and emails into the same central archive, using Content Manager CommonStore for SAP and Content Manager CommonStore for Lotus Domino.

To access documents, clerks use a self-developed workbasket, integrated into Content Manager via its API. "The Content Manager API is excellent," remarks Hans-Georg Pusch. "With IBM's help, it was easy for us to integrate the new document management functionality with our existing financial applications, and to create the line-of-business client. Employees now have much faster access to documents and can work more quickly and efficiently."

He adds, "The IBM Content Manager solution offers lower total costs, partly because we spend less time and money archiving and transporting physical documents, and partly because Gothaer requires fewer employees to manage the same volume of documentation in electronic form."

Enabling process and workflow flexibility with IBM

Beyond the immediate benefits in cost-reduction and improved efficiency and speed in operations, the IBM Content Manager on System z solution supports greater organizational flexibility at Gothaer. Business processes and workflows can be modified more easily, since there are no longer physical document flows and archives to take into account, and Gothaer can more easily pursue its programme of centralization.

Hans-Georg Pusch concludes: "The switch to electronic document management in Content Manager has removed a layer of complexity and inflexibility. For example, it has enabled Gothaer to create a single call center which can share information instantly with specialized back-office employees in other departments and with other partners.

"This would not have been possible with paper-based documentation – document imaging is a key enabling technology for organizational change. Using Content Manager offers increased business flexibility and lower costs, which should result in an improved ability to respond to changing competitive pressures."

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