

economize
your business process



NEXUS'09

Case Study Showcase & Customer Panel

SunTrust Bank
The RAND Corporation
City of Richland

economize
your business process



NEXUS'09

Scott Os

Vice President, Imaging and Workflow
Technology Strategy and Architecture
SunTrust banks

Executive Sponsor for Ilinx Capture Deployment

 **ImageSource**



Company Background

- › Number 7 bank in the U.S. with total assets of \$179.1 billion on March 31, 2009
- › Headquartered in Atlanta, GA and serving over 1,600 retail branches throughout 12 states in the south and mid-atlantic.
- › Provides deposit, mortgage services, credit, trust, and investment services to a broad range of retail, business, and institutional clients.



Solution

- › SunTrust OnRamp powered by Ilinx Capture
- › Integrated into existing Kofax-based capture environment adding distributed and ad-hoc capture to current production, batch scanning capability
- › Building on and leveraging existing QSXs for integration and easier development of additional features



Challenge

- › Deployed over 3,000 multi-function devices across footprint with no method for panel integration
- › Required a flexible, rapidly-deployed, low-cost solution for integration of MFD, fax, desktop scanners, and email attachments into existing capture environment
- › Need to integrate with existing production capture environment.



Benefit

- › Web-based user interface provides for consistent, easy-to-learn presentation to end user community
- › Lower total cost of ownership due to server-based pricing model
- › Rapid deployment so multiple user communities can leverage infrastructure very quickly



Personal Comments About Installation

- › Rapid deployment of enterprise service with two initial communities of consumers
- › Extensive demos and “exposure” should help to increase early adoption rate and ease fears about training
- › ImageSource team instrumental in project leadership as well as technical implementation

economize
your business process



NEXUS'09

Kevin K. Carmody

Systems Analyst
The RAND Corporation

 **ImageSource**



Company Background

- › The RAND Corporation is a nonprofit institution that helps improve policy and decision-making through research and analysis.
- › Since its inception in 1948, RAND has pursued its mission by conducting objective research on important topics, first in national security and later in such areas as health care, criminal and civil justice, public safety and homeland security, intelligence and counterterrorism, education, labor and population, and science and technology.
- › RAND disseminates the results of its work as broadly as possible to benefit the public good. Today, you can search through an archive of more than 10,000 published reports.



Challenge

- › In order to ensure the continued quality of that research, every RAND report, article, database, and presentation is carefully reviewed before its public release.
- › In addition to review by QA personnel and unit management, each report undergoes a rigorous peer review process.
- › The peer review typically includes one or more RAND staff, plus at least one reviewer from outside of the company who provides insight into the quality of the research represented in the report.



Challenge

- › Among the 12 research units, RAND produces more than 800 reports per year.
- › At any given moment, there are around 100 reports somewhere in the review process.
- › The challenge was to replace the current amalgam of unit-developed tracking mechanisms with a unified application that provided improved functionality and consolidated reporting capabilities.



Solution

- › Using the BPM component of Stellent IBPM, RAND was able to quickly develop a comprehensive web-based application
- › The application is flexible – the forms are simple to use but powerful in function, and there is easy access to the forms via multiple paths, or no path at all
- › The application is secure – full access to those who need it, providing limited access to those who do not, no access to those unauthorized, and it also supports blind reviews
- › The application is auditable – BPM auditing provides complete information about the history of each document, and journal entries augment the information available
- › The application is green – email replaces interoffice mail and FedEx as the standard notification medium, and reports can now be viewed online rather than printed and distributed



Benefit

- › Single application means reduced training requirements
- › Electronic communication replacing interoffice mail
- › Consistent reporting
- › Comprehensive reporting
- › Improved visibility of documents throughout the company



Personal Comments About Installation

- › Stellent IBPM was key to the implementation, because the workflow facilities became the backbone of the entire application, and the rest of the product came into play, including the security module, and even linked servers
- › The application consists of 78 forms, 18 templates, a dozen views, a several saved searches
- › It is also fully integrated with Oracle Financials, PeopleSoft HR, and several internally-developed applications
- › Total time to code: 5 months
- › Total coding staff: 1

economize
your business process



NEXUS'09

Jon Amundson

Assistant City Manager
Project Director
City of Richland, Washington



Company Background

- › City of Richland - 1958
- › Government: Council-Manager
- › Population: 43,520
- › Number of Employees: 500
- › Services: General Government, Public Works, Public Safety, Community Development, Parks and Recreation, Electric Utility, Landfill, Library, & Regional 911 Dispatch Center





Challenge

- › Richland's main reasons for implementing:
 - › State requirements on records retention
 - › Public disclosure laws
 - › Business process/workflow improvements

- › City Clerk agenda Packet Process
 - › Completely manual way of creating, editing and finalizing agendas for City Council meetings.



Solution

- › Enterprise Content Management
 - › Oracle IPM
 - › ABBYY Full Text OCR
 - › Cardiff LiquidOffice
 - › ILINX Capture
 - › ILINX Release Script
 - › ILINX Manual Indexing Tool
 - › ILINX Public Disclosure Tool
 - › ILINX Connect Agent for Oracle IPM.



Benefit

- › Streamline City Clerk agenda process by creating electronic workflows for the multitude of approvers/reviewers to make it more efficient.
- › ECM Solution is scalable across the entire organization, is flexible enough to use in various business applications, plan to expand the benefits of this technology city-wide.



Personal Comments About Installation

- › Came to the project late
- › Discovery & Project Plan = Lifesaver
- › ImageSource Team
 - › Al Senzamici, Project Manager
 - › Robert Gartner, Systems Engineer
 - › Kathy Fish, Senior Account Representative
 - › Technical Support Team

economize
your business process



NEXUS'09

Questions & Answers