

## Document Storage and Retrieval

*A Bank Goes Green and Improves Customer Service By Implementing PSIGEN PSI:Capture and Microsoft Office SharePoint*

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### PROBLEM

The Bank's corporate headquarters were overloaded with paper. Loan, deposit and other critical documents for over 4,000 clients accumulated in paper files, only accessible by employees in the corporate branch office. When an employee at another branch required a file, a request was put in for the document to be found, copied, and sent to them. With 75-100 requests a day and each taking up to 15 minutes to process, the amount of wasted time was substantial. Employees at headquarters were constantly interrupted and spent valuable time searching through filing cabinets and folders. Time zone differences also meant requests were periodically held up even longer. These delays and the inefficiency of their manual system affected their 1,200+ employees, as well as their customers.

### CUSTOMER REQUIREMENTS

The goal of the project was for client documents to be immediately available to all employees, regardless of their proximity to corporate headquarters. Quickly retrieving files would save staff time and increase productivity, while also improving ecological friendliness. "We were trying to find a way to go green, and make all of our documentation easily accessible," said the project's Operations Supervisor. A technical approach was pivotal, and moving paper electronically was undoubtedly a more up-to-date workflow solution.

### SOLUTION

To establish an automated workflow, the Bank invested in 2 scanner/copiers, Microsoft Office SharePoint and PSIGEN's PSI:Capture. Eliminating manual steps has made a tremendous impact on the institution and optimized their operations. Documents are scanned in, given a standardized name, and migrated straight to SharePoint. By utilizing barcode separator sheets, PSI:Capture's flexible onramp creates document libraries and folders to further improve searches in SharePoint. "PSI:Capture has been a tremendous help to our bank. It has helped us with turnaround time for document requests, and also cut down on time consuming projects," said the Project's Operations Supervisor. The product is powerful enough to accommodate a multitude of documents in a brief timeframe, and employees at branches worldwide have instant access to files. Processing documents electronically has not only freed the bank from superfluous paper pushing and improved customer service, but has also promoted greener business practices.

### CONCLUSION

Productivity has increased for all of the Bank's employees by automating document retrieval requests. Time previously devoted to manual filing and searching at corporate headquarters is now used for more productive core responsibilities. Furthermore, thanks to PSIGEN'S PSI:Capture, customer service has improved by eliminating the lag time caused by waiting for a response.

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## SOLUTION COMPONENTS

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- ▶ PSIGEN PSI:Capture
- ▶ Microsoft Office SharePoint Server
- ▶ Two Konica Minolta scanner/copiers

## VENDOR BACKGROUND

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**Advantage Technologies, Inc.** is one of the country's leading integrators of network fax, enterprise fax, automated document delivery and processing, and document based capture solutions. Our goal is to help customers find affordable, flexible, and scalable solutions to improve document based processing, improve efficiencies, and reduce costs. All of our solutions deliver clear and immediate ROI. The company is an Authorized Support and Platinum Partner for RightFax, PSIGEN, and Dialogic product lines.

- ▶ **About PSIGEN Software, Inc.**

PSIGEN is the innovative leader in advanced capture applications, and helps organizations convert content into managed digital assets. Customers include service providers, business process outsourcers, and major corporations. We have significant customer concentrations in financial services, healthcare, manufacturing, retail, and energy.

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