



# managing input across the enterprise

## Industry: Life Insurance

### InputAccel Delivers an “Industrial Strength Solution” for Metropolitan

#### Captiva Capture System Cuts Document Storage and Maintenance Costs for South African Insurance Company

To hone their competitive edge, Metropolitan South Africa recently updated its technologies and reduced the storage and maintenance costs associated with its microfiche library. A major insurance company headquartered in Cape Town, Metropolitan employs more than 6,500 in 224 branches throughout South Africa.

#### THE PROBLEM

Huge volumes of printed data were becoming difficult and costly to manage—31 million microfilm images on backfile, plus 80,000 ongoing paper documents received daily.

Search and retrieval of client documentation held on microfilm was time-consuming and inefficient; it both drastically impacted customer response times and delayed internal administrative processing. When a client file was requested, a librarian had to dig into an archive, manually locate the microfiche, make a diazo copy, dispatch that copy to the requester, and then manually re-file the original microfiche a costly process, in both time and labor.

In addition to the obvious drawbacks of time and cost, documents had to be stored twice (as originals as well as microfiche), and at great expense, to comply with legal archiving regulations. As the paper was processed before it was filmed, the microfiche documents could not be considered ‘legal archives’ due to the risk of a ‘knowledgeable person’ tampering, so the paper documents had to be retained (incurring storage costs, etc.) to comply with the legal regulations.

#### THE CRITERIA

Metropolitan used the following criteria in choosing an information capture system:

- ability scan more than 150,000 documents daily (both from microfiches and paper)
- power to ‘scan on demand’ and prioritize certain documents
- able to subdivide each client file (according to the various policies or other document types therein) for identification, classification, and housekeeping purposes.
- capable of interfacing with more than one scanner at differing speeds
- easy administration and management
- run unattended overnight
- seamless integration with back-end system (in this case, Documentum’s eContent Server)
- cross-enterprise scalability for future business needs

Acting on the advice of its systems integrator, Xcel, Metropolitan chose InputAccel®. (Xcel was awarded the contract to design, configure, install, and support an entire document management solution for Metropolitan, working with internal IT to ensure seamless integration and smooth ongoing system performance.)

According to Ludwig Gebhardt, Xcel’s Account Manager at Metropolitan, “InputAccel is the only scanning and capture solution that we recommend to our customers because we believe it and its compatible partner technologies such as Documentum’s eContent Server are the best available today.”

#### THE SYSTEM

A pilot system was designed and tested to capture all client documentation less than a year old for customers with surnames beginning with A, B, or C. It was estimated that it would take up to three years to complete the microfilm back-scan.



“Scanning on demand” was introduced to ensure that urgent documentation would be processed immediately, regardless of other documents queued for processing.

The production system consisted of two parts: the backfile conversion of the microfiche library (at a rate of 54,000 images daily), and the capture of 80,000 paper documents received by mail daily.

“Scanning on demand” requests are generated within the DST AWD and Documentum systems. These requests are electronically relayed to librarians who scan the microfiche document. The image is imported into InputAccel, where the Image Enhancement module reduces the file size between 10% and 40% and increases the quality of the scanned image through despeckling, deskewing, and border removal processes. An operator manually indexes the document policy number. If an image is unreadable for processing purposes, an operator can request a rescan.

Incoming paper documents are scanned at the rate of more than 35,000 daily. Faxes are imported via Xcel’s image-aXcess importer, and are cleaned and exported to Documentum where they will be automatically routed to the correct users according to InputAccel indexing data.

Patch codes (marker pages) or barcodes are used to trigger new folders within the InputAccel tree structure to separate each client document and policy type. Indexing data is used to identify each client folder from within the Documentum DocBase.

Image clean-up filters, such as punch hole and border removal, are employed within the Image Enhancement module to improve image quality.

The AQA module ensures that all pages are properly captured and that the images are readable. Images that fail the checks are automatically sent to a rescan station; those that pass are forwarded to indexing operators for visual inspection. The document then proceeds to the Index module, where the policy number, date, function, department, and document sub-type are captured.

Finally, the images and index text from both microfiche and paper documents are exported to the Documentum DocBase via the Documentum Export Module.

All captured documents are stored in the central DocBase. Document-centric workflows in Documentum are used to route documents in the policyholder services department. DST’s rules-based workflow solution, AWD, references the documents from within the DocBase for the handling of claims and New Business. Document queries, ‘Scan On Demand,’ and ‘Quality On Demand’ requests can be generated from within both Documentum and AWD.

### THE RESULT

Metropolitan has reduced its document search and retrieval time from an average of three hours to *less than five seconds* for imaged documents.

Employees have instant and simultaneous viewing access to customer documentation from their desktops, which has improved customer response rates, and increased productivity and overall processing efficiency. Over two terabytes of storage space has been ‘saved’ as a result of employing image enhancement techniques, and images can be counted as true legal archives because the paper is scanned immediately after the mail is opened, and so remains untouched by “knowledgeable persons.” Paper storage costs are reduced as original documents may now be destroyed.

Jan Cronje, Project Manager of Metropolitan attributes these improved results to InputAccel: “There are many systems on the market...but InputAccel’s management of the CaptureFlow™ (InputAccel-specific workflows) even in a production environment appealed to us. We were also attracted by how easy it is to upgrade the system—by either adding new functional modules or expanding the system by increasing the number of modules of the same function. We felt that InputAccel was an industrial strength solution that would cope with our volumes and needs.”



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