



ParaDM Case Study – Banking Industry

Solution: Distributed Imaging Workflow with Approval and Legacy System Integration

Client Profile

The client ("the Bank") is one of the largest banks in Hong Kong. The Bank operates over 30 branches in Hong Kong and also has an established presence in China through its branches in major cities in China and overseas.

The Challenges

Fax was the major communications tools for all remittance applications in the bank. The whole process was insecure and was non-auditable for validation of verification. This had resulted in slow turnaround time and unintentional disclosure that degrade the bank's service level, decrease customer satisfaction and incur both monetary and business loss.

Furthermore, manual workflow occur duplicate filing of submissions and applications in different office site which always confused staff's on the versioning. The bank then realized that they needed to find an alternative way to solve the problems and improve the operation quality.

ParaDM Solution

Scanning and uploading to server replaced the fax line transmission. Branch supervisor is able to process the initial screening in order to avoid error-inputted forms and other mistakes before the application is proceed.

The control of the process is enforced by the workflow system that handles cut-off time approval process and fund projection requirement. All transaction override process is no longer necessary to be operated at the same site of form submitter. Branch supervisor is able to process the task anywhere web access is available.

The Results

- Reduced operation cost by effectively distributing operation into different location around the globe
- Reduced information turnaround time, therefore, faster response time with enhanced process monitoring
- Faster retrieval of saved past cases and related supporting document
- Provide an accurate service level to customer
- Paperless office operation become possible

The Solution:

ParaDoc –
Document
Management Solution

ParaFlow –
Workflow Solution

ParaForm –
e-Form Solution

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