

Modern solutions for a modern national bank

The Oesterreichische Nationalbank (Austrian National Bank) “produces” some 5,000 new files and dossiers each year. The files take defined ways through the involved functional departments. Up to now, all paper files were transferred to the next responsible employee together with a list containing responsibilities and open tasks before the files were closed and archived.

In order to accelerate and optimize processes, ensure a consistent presentation to the public and make archiving easier, a reorganization regarding electronic files became indispensable. The COSA BPM solution from the BPS-Solutions GmbH met all requirements due to its document management component for electronic file administration, its Workflow management system for electronic process control and its archiving component for safe archiving of files.

The special challenge for BPS-Solutions GmbH was: providing a specific client as well as modeling ad-hoc Workflows for individual file processing.

Efficient file processing with electronic support

Electronic files must fulfill the same requirements as paper files. Difference and advantage compared to paper files: Electronic files are not kept in a physical place but stored centrally. Thus, all authorized users can access the most current version of a file. This avoids data redundancies, loss of documents or the risk that non-authorized users can access critical information. In other words, information safety is increased. In practice, electronic files are handled as follows by the Oesterreichische Nationalbank: After a file has been created in COSA BPM, a kind of check-list is created. This list describes the file’s way through the functional departments including all remarks and notes. Furthermore, the order of functional departments, their tasks and the corresponding deadlines are defined.

When the list is defined, the COSA BPM system automatically involves all responsible users and organization units into the actual file processing. Furthermore, frequently used lists can be stored and reused as templates. Another

advantage is that electronic files can be processed parallel by more than one user or organization unit. Compared to conventional sequential file processing, cycle times can be reduced considerably.

Accelerated decision processes by efficient process control

According to the definitions on the list, the file including the task description is transferred to the responsible group or employee. The responsible employees have all required information in their inboxes, i.e. file number, filed documents, instructions, priority, deadlines as well as notes. As a next step, the employee can evaluate the file by means of standardized reaction schemes. If the evaluation is positive, the instructions disappear from his/her inbox and the file is transferred to the next organization unit. In case of a very complex file, it is possible to add remarks that are stored as Microsoft Word documents in the electronic file. The form automatically gets the corresponding file number, a subject and a creation date. Another advantage compared to

paper files: You can always retrieve the file's current location and status. As the files are always available at each workplace, employees can more easily provide information on processing status or result. By documenting all processing steps, decision processes become more transparent.

Successful searches in the electronic archive

Facing the large number of archived and new files, simple and efficient search options are essential. This applies to files that must be processed at regular intervals but also to archived files that must be processed once again. Thanks to the electronic file support, laborious and time-consuming searches for information are no longer necessary.

COSA BPM provides a search engine that allows searches based on any kind of formal or content-based criteria, e. g. files, documents, deadlines, catchwords, and so on. Furthermore, the

search engine offers numerous functions for limitation or refinement of search results. The found file and its documents can be opened directly from within the result list. In addition, all involved employees can define frequently used files or documents as "Favorites" Therefore, file states are always visible – without any previous search.

"The COSA BPM solution provides all details that we expect from an electronic file system. Activity management for structured and non-structured processes, commercial correspondence components, file administration, electronic signature, resubmission, archiving and much more. By introducing electronic files, we have been able to shorten cycle times, reduce error sources and increase productivity", says Magister Bernhard Urban, assistant head of department of the Oesterreichische Nationalbank.

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