



AUTOFORM: 3.6 Million Banking Documents per annum Arabic Print, Collate, Email & Archive

Overview

Challenge

High volumes: 3.6 Million documents p.a.
Customised Arabic Font
Complex document processing requirements coupled with a need for 24/7 fail-safe operation

Infrastructure

TEMENOS T24 R4 upgrading to R8
Oracle 9i upgrading to 10g
IBM AIX 5.3 upgrading to 6.3
Printers: HP CM 8060

Solution

AUTOFORM LN
AUTOFORM DM
Email Module

Why AUTOFORM?

High speed and volume document processing capability
Arabic text management
Host of features to cut IT management timelines and costs
Automated Emailing, and Archiving with Arabic text and searches

Is it for you?

Recommended by TEMENOS
Proven capability in both SQL & Oracle environments



Saudi Hollandi Bank have been able to dramatically improve the efficiency of their document based processes by using the AUTOFORM Output & Document Management suite of products, as approved by TEMENOS.

Saudi Hollandi Bank were the first Arabian bank to implement TEMENOS T24 and the first worldwide to operate TEMENOS T24 on an Oracle platform. One of the main TEMENOS T24 implementation considerations was how to manage the creation, e-delivery and archiving of transaction documents to support the *55,000 retail transactions per day* that Saudi Hollandi make. Documents included Murabaha & Ijara repayment schedule statements, portfolio investment reports, legal loan approval letters and non Islamic credit card statements.

Saudi Hollandi were already using an output & document management solution, but following a recommendation from TEMENOS and a 5 day proof of concept trial, switched to AUTOFORM as it offered a number of unique advantages including:

- High speed and volume document processing capability
- Arabic text management for printed & electronic documents
- Host of features to cut IT management timelines and costs
- Automated e-mailing, and archiving with Arabic text searches

High Speed and Volume Capabilities

Saudi Hollandi prints or e-mails over 300,000 pages per month, with around ten percent of documents running to 100 pages or more. Compounding high volume considerations were the complexities of the document process: automated switching between print and email according to customer preference, language selection between Arabic and English, and automated sorting of multiple statements for the same customer so that they could be mailed together. In addition, all documents had to be simultaneously indexed and archived so that they could be immediately retrieved onscreen. Processing speed was therefore a critical consideration. The AUTOFORM product suite was already proven in similar environments, but EFS Technology did make several enhancements to provide even faster throughput. These improvements are now included as standard in the latest issue of AUTOFORM LN version V6.5.

Arabic Formatting

A particular advantage of AUTOFORM LN is the inherent use of Unicode and Windows True Type Fonts which would not only allow SHB to print Arabic characters, but the bank's own trademarked Arabic lettering. Manaf Abu-Farha comments: "AUTOFORM LN provides all the necessary Arabic code pages and because it uses Windows drivers we didn't need expensive Arabic font printers. Indeed we were able to settle on HP's CM8060 for batch printing and our existing laser printers at the branches. AUTOFORM DM also uses Arabic word searches with obvious user advantages".

5-10 Day Document Set-Up

Converting TEMENOS ASCII/text reports into professional banking documents using traditional programming can take months and often incurs a high level of consultancy fees. Using AUTOFORM LN and AUTOFORM DM, document setup - including emailing and archiving - can be achieved in as little as 5 to 10 days (assuming template design prior to implementation date)

Design of the templates/overlays

A useful feature of AUTOFORM LN is that the graphical overlay containing the column outlines and bank logo (which eliminates the need for expensive pre-printed stationery) can be designed in any windows application such as MS Word/Excel/Publisher or even from a PDF file. "At SHB our marketing department is now able to design all of our templates" says Manaf Abu-Farha.

Data-mapping of TEMENOS Output (Conditional Data)

The overlays are imported into the AUTOFORM LN which uses a split screen interface showing the sample TEMENOS output on one side and the overlay on the other. Data is simply dragged & dropped to create a route map of where the TEMENOS output should appear on the form. It is very simple to do and doesn't require any scripting or programming experience.

Customisation

AUTOFORM LN offers a number of ways to enrich & enhance TEMENOS output. This also avoids changing the TEMENOS reports which can lead to errors. Automated routines include:

- Numerical data converted to pie, bar charts & graphs
- Automated switching of Hijri, USA & European date/number formats e.g. d/m/yr to m/d/yr & 1,000,00 to 1,000.00.
- (Sub)totals & calculations
- Automated attachments e.g. terms and conditions
- Font & line size changes, repagination, text wrap, bold and text colour

Cost Savings - E-mail

Using AUTOFORM LN, SHB are moving over to email document delivery, which is faster, more secure and substantially cheaper

than traditional posting. AUTOFORM LN arranges for the TEMENOS document to be converted to a secure colour PDF and attaches it to an automated email message, with the statement document date in the subject heading.

Cost Savings - Post Room

AUTOFORM LN also reduces post room delivery costs and delays. As documents are printed it adds Pitney Bowes barcodes and OMR marks to support SHB's highly automated folding, envelope stuffing and franking machines. Statements are also duplex printed. As many of SHB's statements are over 100 pages long, cutting paper use by 50% makes both environmental and economic sense.

Cost Savings - Archive

For SHB to operate at optimum efficiency it is essential that its information is securely stored and immediately accessible onscreen, at both branch and central offices. Using AUTOFORM DM, archive records are now directly retrievable from within TEMENOS T24 enquiry screens so that they can be referred to as staff complete their daily tasks. EFS Technology also transferred the records from SHB's old archiving system so that both old and new records can be accessed from the same source.

Technical Support

Manaf Abu-Farha comments: "The technical support and training from EFS Technology has been excellent and it is one of the main reasons for recommending the AUTOFORM product suite over other solutions. After installation and training we were able to prepare new documents for 43 branches ourselves without referral to EFS Technology. At first we were a little concerned about using a software company based in the UK rather than Saudi, however they have proved to be extremely supportive and it has worked very well. Our own IT department is able to provide first line support for TEMENOS output management, with EFS providing 'how to' second line support when we embark on a new initiative".

Recommendation

Manaf Abu-Farha concludes: "EFS Technology are always pleased to demonstrate their software via Webex™ and always provide a proof of concept trial using your own data, at your own premises. Saudi Hollandi Bank found that this to be a very useful 'try before you buy' exercise and allowed us to evaluate the merits of the software using our own infrastructure, prior to contract. Overall, the investment in AUTOFORM has proven very worthwhile. We are proud to recommend AUTOFORM to other international banks. Quite simply AUTOFORM will save you time and money.

AUTOFORM