



## Success story

**Banca Popolare di Sondrio (SUISSE)**

### Industry

- Financial services

### Solution

- OpenText™ Content Suite

### Partner Support

- Tnext

### Results



**Greater degree** of flexibility and security



**Observance of rules** on compliance



**Cost savings**



**Simpler, more efficient interfaces** for scanning and indexing



**Simple** customizing



**Precise control** of the authorisation concept



**Improved** monitoring



# Banca Popolare di Sondrio (SUISSE) SA achieves greater flexibility and security with lower costs

**Bank replaces old legacy archive with OpenText Content Suite**

*"OpenText Content Suite has simplified our processes, improved our data security and kept our costs under control."*

**Maurizio Di Paola**  
Project Manager  
BPS (SUISSE) SA



**Banca Popolare di Sondrio has a history dating back 140 years. This bank shaped the economic development of the Italian region of Valtellina and then expanded into Switzerland in 1991. Four years later BPS (SUISSE) SA was founded. The bank, governed by Swiss law and wholly owned by the parent company, is experiencing rapid growth and currently has 23 operating units carrying out a broad range of diverse transactions.**

The crucial factors in the bank's decision to replace the existing legacy archiving system that had evolved over time were greater flexibility when introducing new functions, lower costs and maximum possible security.

### **Migration of more than 10 million documents including metadata**

The complete migration of the more than 10 million archived documents from the old system represented the most important factor for success as well as the largest challenge, as the original metadata and information had to be retained, the security aspects increased and the changes carried out seamlessly. The migration process was additionally complicated by encrypted documents and restrictive security processes within the bank. The definition of role-based cross-departmental authorisations for access to documents and information and the associated processes also required particular attention. In addition, external information systems had to be integrated without altering the existing interfaces in order to save implementation costs and time.

### **BPS (SUISSE) SA impressed by security and assurance of compliance**

Following the evaluation process on the basis of strict criteria, the bank chose OpenText™ Content Suite and technology partner Tinext SA.

### **Migration rate of 300 to 400 documents per minute**

The complete migration of the sensitive data was carried out by an ad-hoc tool developed by Tinext. A migration rate of 300 to 400 documents per minute was possible with this tool. Tinext also used in-house developments when faced with other technical and process-based challenges. For example, the technology partner developed a synchronisation agent for changes within the core application. This means that in the event of a change to the customer's branch or account management, the attributes with all the authorisations will automatically be adjusted in the new archive system along with special adapters so that existing interfaces did not have to be altered.

### **Noticeable improvements without visible changes**

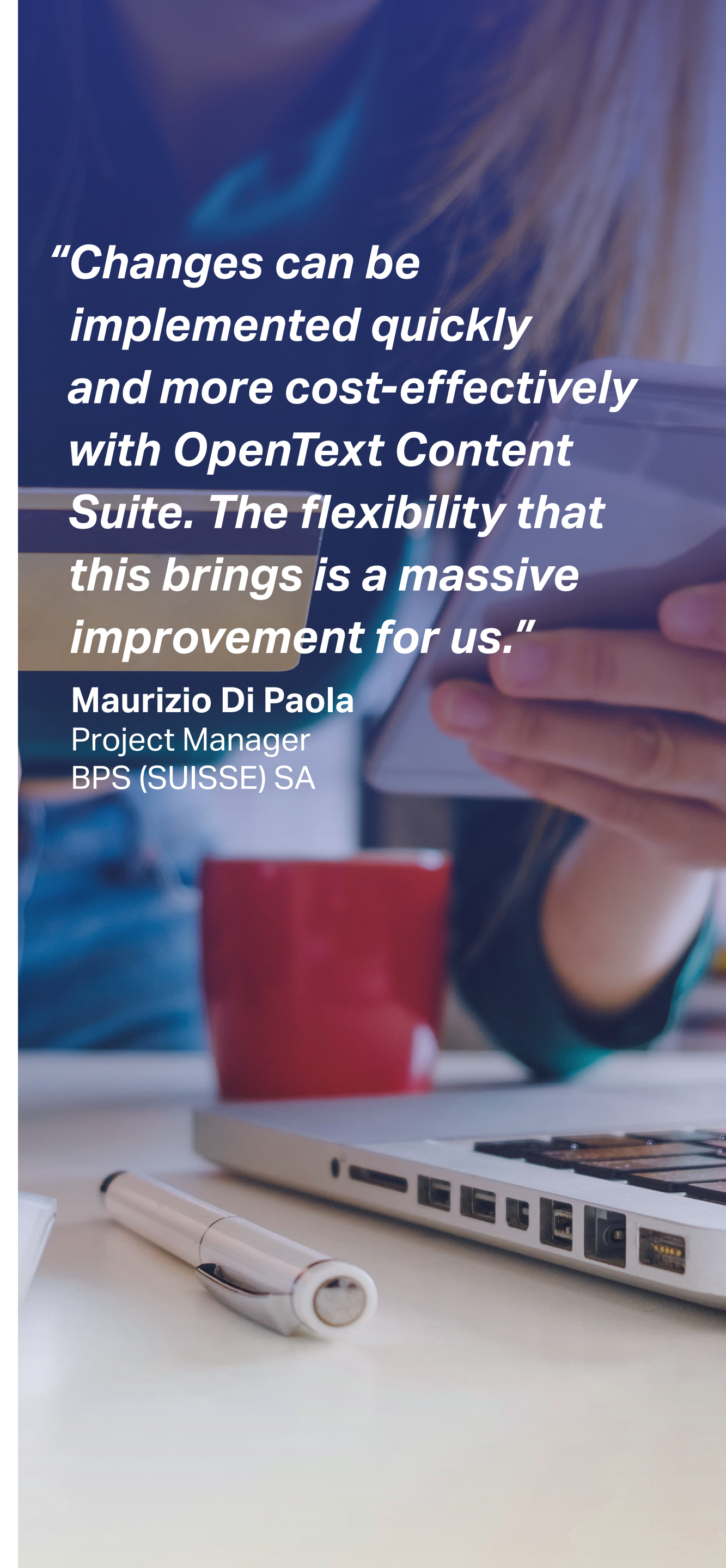
The new solution has not had any negative effect on business processes or employees' working methods. However, individual processes have been dramatically simplified and have significantly improved efficiency. For example, in customer support, the central archive now provides an overall view of all the documents assigned to the customer that can be requested using the system based on the access authorisations. The document status can also be changed much more easily and much more quickly via the new interface.

Furthermore, the indexing of documents without barcodes (or without a legible barcode) can now be easily carried out on the screen. Finally, a customer branch change now takes place completely automatically.

Another advantage of the OpenText solution is the simple integration of applications and solutions from other providers. At BPS (SUISSE) SA, improved and strict monitoring was implemented for the handling of highly sensitive data and a two-level authorisation model (RSA Authentication Manager) was implemented according to the sensitivity of the data.

***"Changes can be implemented quickly and more cost-effectively with OpenText Content Suite. The flexibility that this brings is a massive improvement for us."***

**Maurizio Di Paola**  
Project Manager  
BPS (SUISSE) SA





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*“Integration projects such as these are really easy to implement with OpenText Content Suite, said Patrick Vitali, head of ECM Solutions and project manager at Tinext.*

### **Flexible, easy and fast customizing**

If the bank now wants to introduce new reporting or integrate or monitor new processes that do not relate to the archive, this can be achieved extremely easily and quickly. **“Changes can be implemented quickly and more cost-effectively with OpenText Content Suite,”** confirmed Maurizio Di Paola, project manager, BPS (SUISSE) SA. **“The flexibility that this brings is a massive improvement for us.”**

### **Planned enhancements**

Due to these positive experiences, BPS (SUISSE) SA is implementing other OpenText solutions with Tinext and is planning to enhance these with additional Enterprise Content Management (ECM) functions.

### **About Tinext**

Based in Lugano and Varese, for over 10 years Tinext have been developing leading solutions for the digital market to enable companies to reach their strategic goals. Tinext offers a range of services, including website design, Enterprise Content Management platforms, web marketing activities, housing and hosting solutions.

[www.tinext.com](http://www.tinext.com)



### **About OpenText**

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit [opentext.com](http://opentext.com).

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