

success story



International Finance Corporation banks on hp digital sender with Cobra Technologies and PtP Solutions to centralize documentation management

The International Finance Corporation (IFC) realized it was time to bring its documentation management system into the 21st century.

As a member of the World Bank Group, the IFC shares the World Bank Group's objective of improving the quality of the lives of people in developing member companies. Specifically, the IFC promotes sustainable private sector investment in developing countries as a way to reduce poverty.

foreclosing on the challenge

George Vaughan, IFC project manager, explained, "Our goal was to centralize the documentation associated with all of our investment operations. We wanted to position ourselves for true knowledge sharing."

Documentation was previously distributed across departmental disk drives and then filed under different organizational systems. Joanna Tousley-Escalante, head of IFC's Information Center, noted, "IFC's legacy documentation management

environment was dysfunctional. Some departments were scanning documents to local network drives in one format, while others were storing the same file in another format elsewhere."

Prior to the new centralized document management system, IFC had already invested in HP Digital Sender 9100C technology to allow paper documents to be scanned to an electronic file and e-mailed. Each user would send the scanned images to their own e-mail, then at their workstation, detach the scanned image and store it on the department disk drive with other associated data. It was a cumbersome process at best.

banking on PtP Solutions

IFC had a relationship with PtP Solutions that dated back to 1998 when PtP was retained to implement the IFC's first corporate-wide automated document workflow system. It subsequently developed several web sites for a number of IFC departments and also was retained to provide application support services for several systems.

IFC standardized its document management system on Domino.Doc, hosted by Compaq, now HP, ProLiant servers. PtP, an IBM/Lotus Business Partner, already had extensive experience with Domino.Doc. IFC turned to PtP for its recommendation on the remaining technology partners that would be needed for the centralized document management system. After evaluating several solutions, IFC selected Cobra Image Router (CIR) from Cobra Technologies.

"PtP had experience with the CIR software and knew that it could work with the HP Digital Senders to make the document and meta-data entry into the Domino.doc system simpler," said Vaughan. "We wanted the staff to have the option to scan documents and have them stored into the database in a one-step process."

PtP handled the entire implementation of CIR from software installation on the Lotus Domino server, to setting up user options, to testing. Prior to the implementation, IFC already had around 60 HP Digital Senders. To ensure that the implementation of the document management system was truly corporate-wide, IFC increased the number of HP Digital Senders to 96 throughout its headquarters and field offices.

CIR enables the intelligent routing of documents directly from the HP Digital Sender 9100C to any Lotus Notes® database, Domino.doc binder, Lotus Notes mail file or e-mail address electronically throughout the organization. With integrated optical character recognition capability, CIR is able to deliver searchable images in a variety of formats including TIFF, PDF, RTF, HTML, Excel and ASCII Text. The software is used to create specific destination options within the document management database, in this case Domino.Doc. These destination configurations appear as selection options on the front display of the HP Digital Sender, from which the user can appropriately select at the time of scan. Users can be prompted or

at a glance:

name: PiP Solutions
location: Bethesda, MD
founded: 1996
phone: (301) 718-1001
URL: www.ptpsolutions.com
primary services: PiP Solutions is an IBM Premier Business Partner that specializes in designing, customizing and implementing Content Management, Document Management and Records Management solutions for its customers, utilizing the IBM and Microsoft suite of products.

at a glance:

name: Cobra Technologies
location: Tallahassee, Florida
founded: 1995
phone: (850) 553-9393
URL: www.cobratech.com
services: Cobra Technologies develops products and services based on IBM and Lotus technologies, with an emphasis on Document and Knowledge management. Specific solutions include Cobra Image Router (CIR), DocTools! Application Suite and Cobra Bots for Lotus Sametime.

challenges

- centralize documentation associated with all of IFC's investment operations
- standardize one file structure with set meta data
- physically reduce amount of paper stored, and reduce physical storage costs

solution

- install additional hp Digital Senders 9100C
- deploy Cobra Image Router software
- utilize Lotus Domino server
- partner with PiP Solutions

results

- rolled out centralized documentation system and trained entire staff in three months
- reduced paper flow and storage costs
- increased efficiency
- approximately 9,000 documents have been scanned and stored centrally to date

at a glance:

name: International Finance Corporation
location: Washington, D.C., with 80 offices worldwide
founded: 1956
members: 175 countries
employees: approximately 1,200 in Washington and 700 worldwide
URL: www.ifc.org
services: The International Finance Corporation, a member of the World Bank Group, promotes sustainable private sector investment in developing countries helping to reduce poverty and improve people's lives

allowed to enter data about the document as it is scanned, or save the document to a pending folder to have the meta-data added by the user at a later time.

results generate ROI

IFC began pilot scanning in July 2002 and rolled out the entire document management system in mid-September. Immediately staff noticed that the CIR software significantly reduced much of the workflow in capturing and storing documents and improving efficiency. Today, about 500 documents are being scanned and stored every week.

"The response has been positive," Vaughan commented. "We had everyone trained by late November – 1,200 staff here in our Washington, D.C. headquarters and about 700 more spread across 80 offices around the world."

He concluded, "PiP has done an extremely professional job from day one. This was a huge effort. They have really

solid relationships with both Cobra and HP so that meant we weren't waiting around for critical answers to keep the project rolling. The bottom line is that the centralization has been very effective. Our users (with the appropriate security clearance) now can centrally access and leverage documents, regardless of where they are located."

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