



“We were impressed by the quick migration. Considering that our previous cooperation with Doxis was also so positive, we can definitely recommend the company as a reliable partner who takes good care of its customers.”

**Ewelina Gutowska-Zatorska, Operational Director
Raiffeisen Bank International AG, Poland**



Best Practice

Company	Raiffeisen Bank International AG, Polish Branch
Topic	Document migration, archive solution
Industry	Banking
Employees	230
Headquarters	Warsaw, Poland
Integration	Active Directory with SSO, Microsoft Office
Project Scope	Poland

Challenges

- Following a demerger, the bank urgently needed to establish its own archive and migrate documents and data
- Employees lacked a consistent means of archiving and accessing documents in daily work
- Existing in-house software applications had to be integrated
- The bank wanted a software solution that would enable it to continue pursuing its digitalization strategy

Targets

- Migrate relevant customer documents and data quickly and securely from the legacy archive to a modern content archive
- Provide bank employees full and constant access to documents and data, incl. customer signature cards
- Seamlessly integrate new archive solution with bank’s applications
- Set up extendible and future-ready digital content services platform

Solutions

- Company-wide ECM on one technological platform: future-ready and extendible, providing employees constant document access
- Doxis archive went live already in the bank’s first week of operations
- 23 types of documents readily available and organized for employees in central archive

Project Overview

Starting Point

In 2018, the bank Raiffeisen Bank Polska S.A was split: one part was sold to another bank, while the other part established independent operations under the name Raiffeisen Bank International AG (joint-stock company; Polish branch). During the post-demerger process, the bank needed to quickly, securely and compliantly migrate relevant customer documents and data from the former bank's legacy archive to its own modern archive. What's more, it had to make sure that employees had a consistent way to access and process the documents, including customer signature cards – crucial for daily business. The newly independent bank also wanted to establish a future-ready and extendible enterprise content management (ECM) platform. It needed a partner that would not only effectively migrate pertinent documents and data, but would support also its overall digitalization strategy.

Why Doxis

- Doxis had already successfully implemented Doxis document management at the bank when it was Raiffeisen Bank Polska S.A
- The established and trusting relationship with Doxis
- The excellent product quality and high level of usability
- Doxis's ability to quickly implement the solution

Solutions

- Doxis software with archive, DMS, BPM, digital workbaskets and digital customer records for correspondences, medical documents, financial statements, policies, claims, etc.
- Workflows for flexible task distribution and original orders; management of undeliverable items and archiving
- Multilingual software in English, German and French

Integration

Active Directory with single sign-on; Microsoft Office, in-house applications

Partner

Gold partner Betacom S.A., data extraction from legacy archive: IBM Content Manager

Document volume

 1 TB

Users

 125 users registered

Implementation

- July 2018: Doxis given order to migrate documents and data from legacy archive (IBM) to Doxis archive
- November 2018: Migration completed simultaneously with bank demerger. Fully operable and accessible archive and document management system in first week of business
- Planned 2019: Another migration from the legacy DMS system; continue document migration from IBM Content Manager

Benefits

- For the company: Doxis fulfilled the bank's urgent need to not only migrate documents and data immediately (in less than 4 months), but also to get a new archive set up and operational with no downtime; a future-ready and extendible ECM platform
- For the employees: Constant and centralized access to customer documents and data; only minimal employee training required thanks to software user-friendliness

Used Doxis Modules

Search

- Text mining
- Keyword
- Full text

Integration

- ERP
- CRM
- Office
- HR

Input

- Email

Capture/entry

- Capture/Scan

Doxis

Clients

- Windows
- Mobile
- Web

Retention

- Archive
- DMS

Files & Processes

- eRecords
- Task & Process Management/BPM

Extraction

- Inbound Invoice
- Inbound mail