

Industry

- Insurance

Solution

- OpenText™ Brava!™ for Documentum™ Webtop™

Results



Consolidated electronic documents on central server



Streamlined markup and review of workflow process



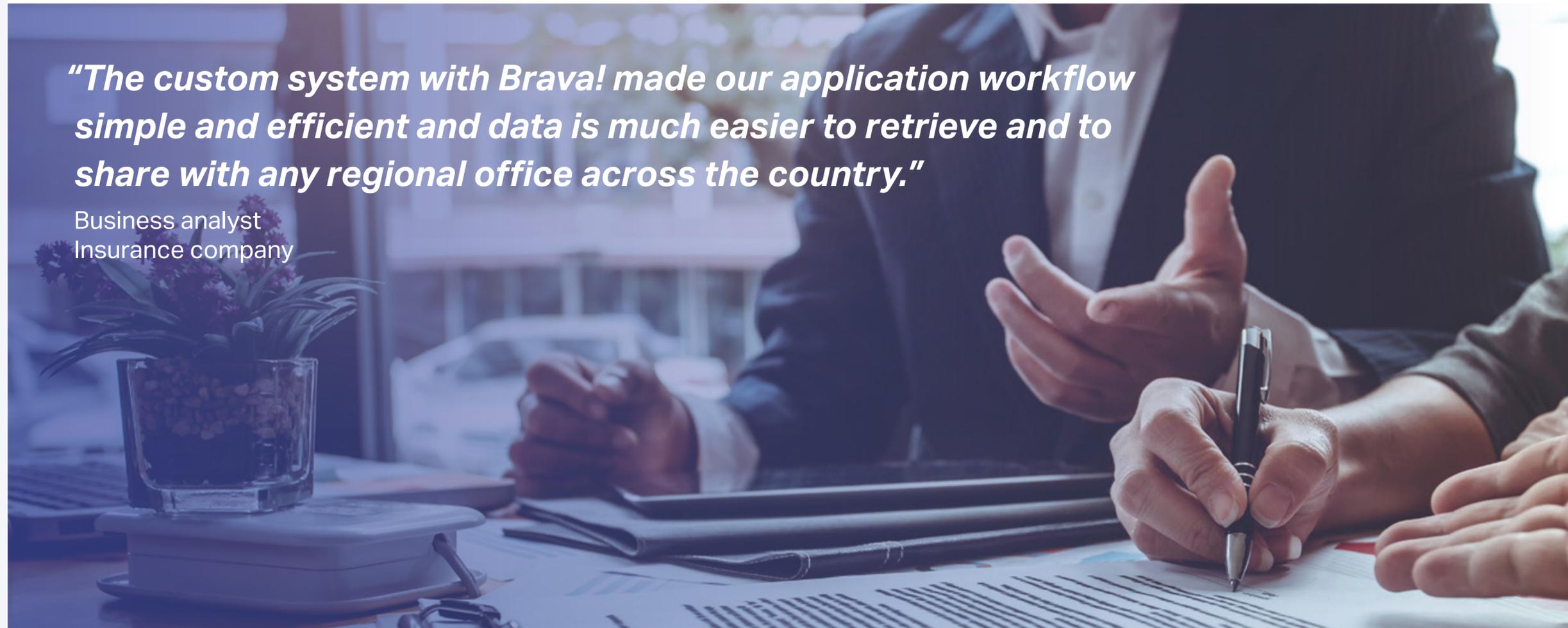
Improved access, collaboration for regional offices countrywide

Insurance company streamlines workflow and speeds forms processing

Property and casualty insurance provider improves efficiency and enhances collaboration with OpenText Brava! for Documentum Webtop

"The custom system with Brava! made our application workflow simple and efficient and data is much easier to retrieve and to share with any regional office across the country."

Business analyst
Insurance company



Property and casualty insurance companies focus on the insurance needs of homeowners, drivers and business owners. Most of the insurance applications and claims in the United States are recorded on Association for Cooperative Operations Research and Development (ACORD) forms. A nonprofit standards organization, ACORD is well known for its vast library of forms used by the insurance industry.

Insurance companies that manually process ACORD forms, face challenges from both the inefficient and time intensive process, but also in sharing or collaborating on documents. In response to these challenges, one insurance company focused on designing and leveraging a custom system built on the OpenText™ Documentum™ enterprise content management (ECM) platform.

During the design phase, the company found that one of the most common requests from its users was for electronic annotation tools. The insurer's underwriters, service assistants (SAs) and agents wanted an easy way to add and share notes. An in-house researcher suggested OpenText™ Brava!™ for Documentum™ Webtop, a web-based view and annotation tool. Having used Documentum in other installations, the researcher knew it delivered the annotation and collaboration capabilities the insurer's team needed. Together, Documentum and Brava! offered a powerful solution.

With more than 8,000 employees, 14 offices and a host of independent agents across the U.S., Brava! has helped improve how the teams view, annotate and share documents.

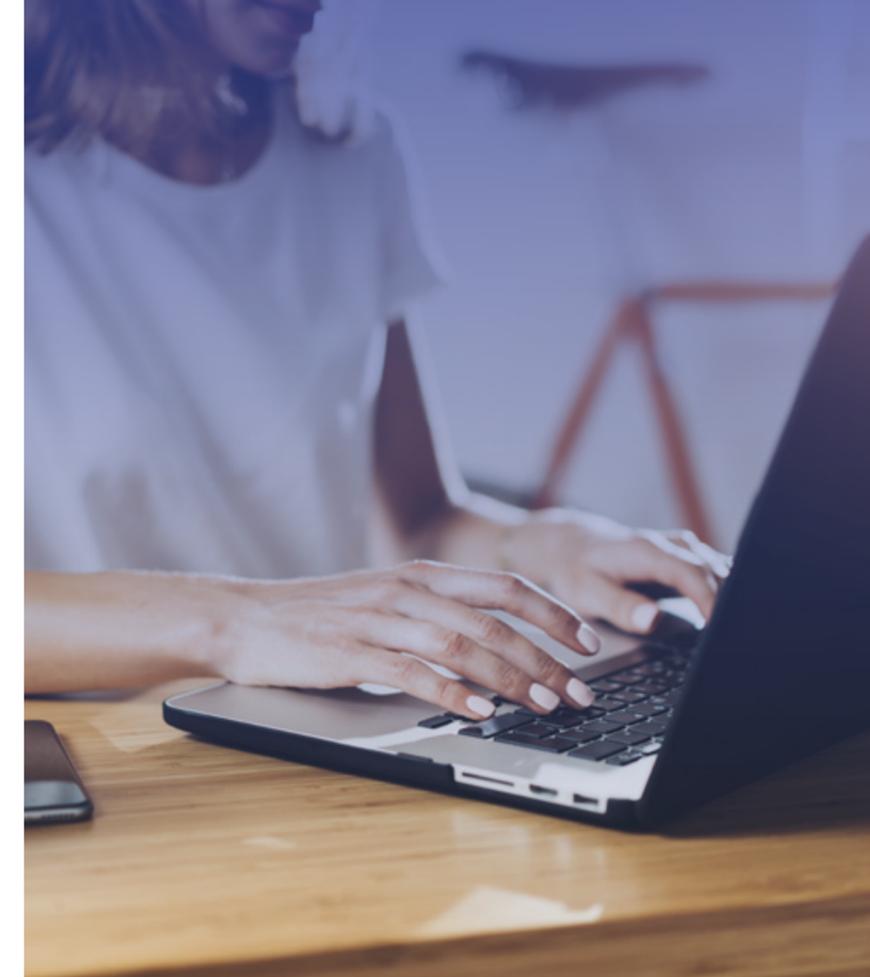
"Our users really got what they needed with Brava!," said the company's business analyst. ***"The custom system with Brava! made our application workflow simple and efficient and data is much easier to retrieve and to share with any regional office across the country."***

As a universal viewer, Brava! lets users view and mark up virtually any file type, enabling an insurance agent to send an application or claim to the SA in any format, including PDF, TIFF or JPG. Because Brava! launches within the custom application when the user clicks on the integrated Brava! icon, SAs can easily and electronically review insurance forms. Brava!'s annotation tools let the SA insert missing content or supplemental information before electronically routing the insurance request to the underwriter.

Instead of physically routing an insurance application from agent to SA to underwriter, Brava! lets users electronically add and share notes. Users can also highlight important information and circle areas that require additional research.

Prior to implementing Brava!, hard copy forms were stored in a filing cabinet, making accessing them inconvenient and not allowing regional offices to view handwritten notes on the documents.

Following Brava! implementation, once the request has been quoted and sent back to the insurance agent, the ACORD application and all Brava! annotations are stored within Documentum. Whenever a user opens any document with associated annotations, the custom system automatically opens the document within Brava! and displays all annotations.



About OpenText

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