EMC Captiva and Documentum upgrade

Industry:

Financial Services

Company:

Our client is one of the world's largest banks with a premier brokerage unit. It is one of the most respected financial organizations with over 15,000 financial advisors and $2.2 trillion in client assets with close to $90 billion in annual revenues.

Summary:

Our client has been leveraging the EMC Documentum and Captiva platform for a long period of time. Their offshore (Mumbai, India) operations office is the operational center for excellence for content management. This location had Documentum 6.5 SP1 as well as Captiva InputAccel 6.5 installed. The client had some additional needs pertaining to capture that were not available in the Captiva 6.5 but were possible in Captiva 7.

Solution Summary:

The solution involved the execution of an upgrade from EMC Documentum 6.5 SP1 Documentum 7 as well as Captiva InputAccel 6.5 to Captiva InputAccel 7.

Technologies:

EMC Documentum 6.5 SP1, EMC Documentum 7 Suite, Captiva InputAccel 6.5, Captiva InputAccel 7

Customer Profile

Our client is one of the world's largest and most respected banks with a premier brokerage and wealth management group. Globally, this independent division of the client has over 15,000 employees. However, the parent financial services group has over 250,000 employees.

Challenges

The client had incremental capture needs born out of business needs coupled with the need to make the capture process more efficient and effective. These features were to be made use in subsequent phases of the client's implementation. But to be able to get started the client needed to upgrade to latest version of Captiva InputAccel system to replace their existing Captiva 6.5 scanning solution. The capability of Captiva InputAccel 7 to provide advanced features for intelligent capture solution, business efficiency and improved organization speed were the primary impetus behind the needs for the upgrade.

Incrementally, the process called for migration from Documentum 6.5 to the current version Documentum 7 for both seamless integration and maintaining comparable support.

Solution

The Verinon team implemented a solution to go in accordance with the security and timeliness of access as required by the client including the following tasks:

➢ Upgraded from existing EMC Captiva InputAccel 6.5 and EMC Documentum
➢ 6.5 SP1 to latest version of EMC Captiva InputAccel 7 and EMC Documentum 7
➢ Upgraded all existing processes to Captiva InputAccel 7
➢ Migrated existing code to Captiva Input Accel 7 and Documentum 7
➢ Webtop client level customizations were upgraded to Webtop 6.7 and documents, content as well as metadata, business objects as per the new requirement were upgraded to the Documentum 7 system as per the business requirements
➢ Custom DocApps were installed in Documentum 7

Results

The Upgraded Documentum 7 and Captiva Input Accel 7 solution provided a centralized document management system allowing for the advanced features and capabilities.

- ➢ Upgraded to latest version of Captiva InputAccel 7 and Documentum 7.
- ➢ With Captiva 7 several new features are used for existing processes like Captiva designer, Captiva Desktop and enhancements to auto classification of documents, simplified the development and deployment of enterprise capture solution, and delivered accuracy and operator performance
- ➢ The new Captiva 7 version provided advanced capabilities for intelligent enterprise captures, business productivity and enhanced organizational agility
- ➢ The new Documentum 7 improved memory usage, which in turn can yield better concurrency and scalability and enhanced session management
- ➢ Upgraded the customized Webtop web based application to Webtop 6.7 SP2

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