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Success story

Metrópolis Seguros S.A.

Results

🧩 **Full integration between all systems** related to the management of documents for clients and cases: PRIMAS + OpenText™ eDOCS DM + scanning system + viewer

📄 **Full and easy access** to all related information

🛠️ **Reduced system maintenance costs** of up to 50%

METRÓPOLIS SEGUROS

Metrópolis Seguros, OpenText eDocs DM and One Way Clear

Metrópolis Seguros insures its future with OpenText Document Management, eDOCS Edition (eDOCS DM)

"Metrópolis eliminated complexity, provided an efficient service to its users and customers, increased the scalability of its systems and reduced maintenance and development costs by over 50%."

José Manuel Garrido
IT Director
Metrópolis Seguros S.A.

Metrópolis Seguros is a 100% Spanish-owned insurance and reinsurance company that has been operating for over 70 years in the national insurance market. Known for its robustness, it is one of the most reliable companies in the Spanish insurance market. With over 100 employees, 11 branches, two sales offices and 14 branch offices, it is without a doubt the iconic company headquarters situated between the streets of Alcalá and Gran Vía that characterize it.

Metrópolis's product portfolio covers the traditional range of insurance, including insurance for families, businesses and goods, but it differs from other insurers because of its 'niche' products, such as those for shipping vessels and horses. Its innovative philosophy can be seen in both its product range and business activities, which include a dedication to technological innovation in its services-based architecture.

In 2012, while motivated by excellence in customer service, Metrópolis launched an online billing project with the goal of simplifying internal processes, exporting its product range to intermediaries and radically reducing client response time. In addition to this challenge, it needed to update its file access system, which was being managed via an obsolete application, incurring high maintenance costs and posing a continuity risk due to the updating of the operating system to Windows® 8.

After weighing the options and taking advice from technology solutions partner, One Way Clear, Metrópolis decided to replace the existing application with a new web application. The new application would be integrated through web services with the existing document manager, OpenText™ Document Management, eDOCS Edition (eDOCS DM) and use the integration framework of One Way Clear´s eDOCS Integration Solution.

Start of collaboration between Metrópolis and One Way Clear

In the 1990s, in accordance with the regulations enforced in the insurance sector, and motivated by a desire to achieve excellent customer service, Metrópolis developed a process management system to facilitate company operations such as pricing and claim management. This system was developed internally on the Unisys platform and was named "PRIMAS."

PRIMAS achieved its goals but almost immediately faced new challenges as a result of the dramatic growth in the volume of information it was managing and the fact that a large proportion of the associated documentation was on paper.

Metrópolis was challenged with the issue of managing sensitive information related to its customers in a flexible and efficient way, while correctly linking the information with the corresponding files, policies and processes managed on PRIMAS. An enterprise document management solution was required that would help to optimize processes and offer an interface that linked processes and content.

Having analyzed various technological partners and solutions available on the market, Metrópolis opted for One Way Clear, a firm specializing in ECM, BI and Social CRM solutions. One Way Clear suggested integrating eDOCS DM. This solution was selected because of its native integration with Microsoft® Windows Explorer and Outlook®, as well as its ease-of-use, making for effortless adoption by business users. In addition, the solution's versatility and flexibility enabled them to manage not only their clients' documentation, but to also work internally with project documentation and emails.

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Having selected the OpenText Document Management solution, Metrópolis initiated a project to create an application that would integrate the areas of document management and process management through what it called "PRIMAS Document Management." This would combine its PRIMAS system with eDOCS DM, giving the company a flexible system in which a claim could be created or found and all relevant documentation would be attached or linked to it.

The first version integrating the solution was carried out via the eDOCS DM native API on Visual Basic, which communicated directly with the API. As time passed, and as the volume of documentation and the number of integrations required with third-party applications (such as the scanning system) increased, Metrópolis again faced the need to reduce the complexity of the integration, making it more scalable, economic, accessible and easy to maintain.

Improvement in the efficiency of the PRIMAS Document Management application

Through its IT director, José Manuel Garrido, its head of development, José Ortíz and One Way Clear, Metrópolis analyzed various options for achieving both an improvement in processes and a reduction in the time needed for integration management. It decided to keep the eDOCS DM Document Manager because of its security, versatility and scalability. However, the API integration was removed and replaced with a services layer that allowed the document manager to integrate with PRIMAS and any third-party application, without having to resort to manual coding, which drastically reduced implementation time and subsequent maintenance.

Metrópolis chose the eDOCS DM Integration solution by One Way Clear, an integration framework based on services (SOA and REST) and developed using WCF technology. This solution makes it possible to develop integrations between systems as well as new applications constructed on eDOCS DM, such as the integration between the document manager and "PRIMAS Document Management." The decision was based on the tool's reliability, its stability, ease-of-use in development, capacity to integrate the document manager with any third-party application and the fact that it is a current piece of software with constant improvements being made and an international reach. Another factor that Metrópolis believed was crucial was the short implementation time, reinforced by some of the international customers now using One Way Clear's eDOCS Integration Solution.

Results of the new application, "PRIMAS Document Managment"

The new system's benefits were immediately obvious. After only two months of work, the first version of the new web responsive application was available, fully integrated with PRIMAS and the eDOCS DM document manager and with the scanning system on the business network and the eDOCS DM native viewers for web environment.

Also, Garrido and Ortíz noted the ability to reuse the native documentation viewer within the web application, which saved Metrópolis from having to purchase new viewers for more than 80 work stations.

Metrópolis and One Way Clear are currently working together on the development of version 2 of the PRIMAS Document Management application, with the aim of migrating 100% of the remaining screens and completing the integration of all business processes by end of year 2015.

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