

Electronic Signing in Banking Delivers a Productivity and Security Boost

Accelerating Processes with the DocuSign Signature Appliance integrated with SharePoint, K2 and OpenText

Background

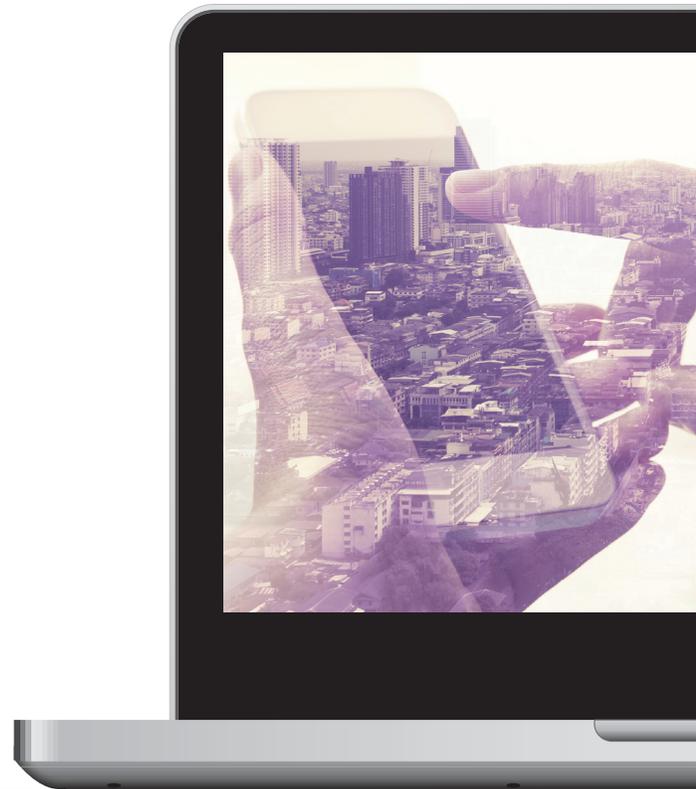
A leading Netherlands-based bank employs a wide network of in-house experts that provide insight into market developments. The bank uses the OpenText Enterprise Content Management (ECM) system to manage all their documents and to store the electronically signed versions. Recently, the bank also designed and implemented K2 to manage multiple workflows that are initiated from the OpenText Content Server, using SharePoint data as an input. Reports had to be physically signed at the bank's offices before they could be processed. The bank's management team realized that transitioning to automated reports and electronic signing would accelerate their work processes while saving considerable time and cost.

Challenge

The bank was looking for an electronic signature solution that could be seamlessly integrated with existing applications such as OpenText, K2, SharePoint and Microsoft Office. Furthermore, the solution would have to accelerate processing without compromising either quality or security. The solution would also have to comply with the relevant EU Directive on electronic signatures and Dutch regulations.

Solution

After running a detailed proof of concept in the Evaluation Department, the bank chose the DocuSign Signature Appliance, the most trusted on-premises signing solution for regulated industries and markets.



Top Benefits Achieved

- ✓ Compliance with Dutch and EU regulations
- ✓ Seamless integration with SharePoint, K2 and OpenText
- ✓ Shortened cycle times while maintaining high levels of security
- ✓ Tens of thousands of documents signed every year

Seamless and secure integration with OpenText, K2 and SharePoint accelerates signing processes

After authorized employees electronically sign documents using the DocuSign Signature Appliance Web App, integrated with a K2 workflow solution, the signed version is automatically distributed by the workflow and stored in the OpenText ECM system. The bank went on to further integrate signing using the DocuSign Digital Signature Appliance Connector for OpenText and the DocuSign Digital Signature Appliance Connector for SharePoint, creating smooth and simple workflows for both the bank's internal users and its customers.



Results

Today hundreds of employees use the Signature Appliance to electronically sign more than 50,000 documents annually. The solution is installed on all relevant computers, ensuring that a variety of documents, including Word, Excel and PDF, can be signed from within their respective applications. This also ensures that the bank can maintain full control over all signature-dependent processes and procedures across the organization.

Implementing the Signature Appliance was easy, as was the integration with K2. The appliance server takes care of issuing signing credentials to clients, so that the signing process within the workflow and the exchange of the signed documents is completely seamless. By combining automated workflows with a high-quality electronic signature solution, the bank will be able to reach its goal of having a fully-paperless work environment where authenticity is ensured.

Following the success of the initial implementation, deployment is currently being extended to other departments and processes including a primary focus on 'flexible working' and digital case files. Additional plans include setting up a web-based customer service portal based on the DocuSign Signature Appliance Web App which will enable clients to use any device to sign PDF documents without requiring them to install software. The bank has already started to send electronically signed documents to clients and the next step is for clients to start electronically signing as well with security as the first priority.



Employees greatly appreciate the fact that it is impossible to tamper with a document that has been electronically signed with the DocuSign Signature Appliance, as opposed to paper documents which can be more easily modified after signing."

- Senior Project Manager



About DocuSign

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For U.S. inquiries: toll free 866.219.4318 | docuSign.com

For EMEA inquiries: phone +44 203 714 4800 | email emea@docuSign.com | docuSign.co.uk

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