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Client:
Garanti Bank

Solution:
Collateral Evaluation Flow

Overview

A process involving multiple external actors which directly determines customer response time, now quick and simple.

Needs ●

When the client requests a loan in the Garanti office, a collateral evaluation request is created.

This request, containing all documents and information regarding the evaluated good must be verified by multiple third-party evaluators as well as internal actors.

How it was done ●

Everything was on email, with documents sent as attachments.

The folder circulated back and forth between actors, with the same, slightly modified documents.

There was no way of controlling response times, no traceability and a high error risk.

How things work now ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ●

1 The office employee generates the evaluation request from OnBase. All documents and data are introduced. The document is on the server and all actors work on the same one, with full change history.

2 Colateral department employees are notified and can see the request queue in OnBase. The employee taking on a request can access it and act upon it (sign, complete, verify, approve, send).

3 The Garanti Bank employee then sends the request to the corresponding evaluator who is notified by email, where they receive a link to access the OnBase Web Portal. The evaluators have their own account with limited privileges to see all incoming requests.

4 They check the folder, and complete a digital form to present the evaluation conclusions. This form generates a document attesting the conformity and evaluation which is attached to the digital folder.

5 Once the evaluator has marked the task as done, the request goes through the remaining internal actors who verify, approve or reject. Once all steps have been completed, it reaches back the client with the conclusion.

Features
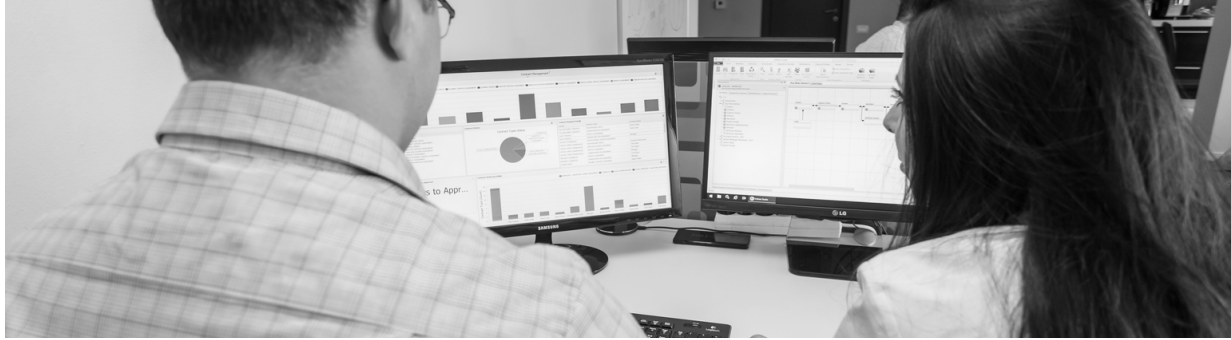
The entire process is timed, and each actor has a limited time to complete tasks. They are notified when this time is running out.

OnBase can automatically validate information where evaluation benchmarks exist, and notify in case of mistakes.

User discussions about a request are performed in the chat portal associated to that request for complete decision traceability.

OnBase periodically generates performance reports. They show bottlenecks, conclusions (approvals v. rejections) and the average response time for each actor.

Results

Each request has complete decision and change history.

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Clients receive the verdict quickly and response time consistency is ensured.

There is performance control for evaluators, for their reponse times, while requests can no longer be forgotten.

The automatic process ensures a minimal error rate, and saves significant employee time to maximise departmental efficiency and customer service quality.

OnBase is a scalable platform in which new applications for diverse needs can be built. Garanti has extended their solution with a Legal Support Application.

Hyland

Client:
Garanti Bank

Solution:
Legal Support Flow

Overview

Internal support tickets should not consume resources. That is why this simple system is so useful.

Needs

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Any department can require legal support from the legal department. Their request must reach this department.

Information must circulate back and forth between the actor making the request and the legal department. This information includes documents, structured data and discussions.

How it was done before

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Legal requests were made via email, with documents as attachments.

The legal department could request new documents or additional information via email.

There was no way of controlling response times, no traceability, just endless email conversations with a very high risk of error.

How things work now

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1 The employee making the request generates a legal support ticket in OnBase, where they select the type and fill in its details, attaching any required documents.

2 The request enters the legal department on a queue from which each employee can take on a ticket in FIFO order.

3 All discussions regarding a request are performed in that request's chat in OnBase for full decisional traceability. If new information or content is required, the legal department sends the request back to the requester with the respective notes.

Every request has a complete decision and changes history. Requests can only be made in OnBase, everything is standardised.

Once the ticket is launched, a timer is activated. Depending on the actor awaiting the action, the timer is either at the requester or the legal department employee