

Success story: Development of financial review system through BPM for CCSBSO



Rootstack supported the Central American Council of Superintendents of Banks, Insurance and Other Financial Institutions in the creation of a platform to manage financial reports.

About CCSBSO

The Central American Council of Superintendents of Banks, Insurance and Other Financial Institutions was created in 1976 with the purpose of forming an association between the banking and financial institutions of Central America, to improve financial supervision practices and ensure the economic stability of this conglomerate of countries.

Challenge

The CCSBSO needed a platform that would allow it to easily, efficiently and safely manage the financial reports issued by the different banking institutions of the Central and Latin American region, in order to make their review more efficient.

Our solution

Rootstack's team of experienced engineers was able to understand the client's need, offering the best solution for this case: the development of a system through BPM (Business Process Management) that would allow them to gather all the reports issued by banks and financial institutions.

How is this achieved? The platform allows the Superintendencies to upload their financial reports in XML format, thus creating all the financial reports of the different conglomerates within the system.



What the software did was that it reconciled the information of all the financial conglomerates of each country and centralized the information so that, then, the CCSBSO could review all the information and download the reports, make macro and comparative calculations.



Flow system creation

Another of the most important aspects of this project was the creation of a flow system, where each bank uploaded the information to the BPM platform and underwent an approval process.

There is an internal flow of management between different approvers within the system, which sends notifications to those responsible for these approvals. Then you get to the final flow of downloading and reviewing these reports.

Technologies

For this project, our developers used technologies such as JavaScript with PHP and Microsoft products, achieving a robust and efficient platform that meets the needs of the client.



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