

# PRO ARCHIVER FOR BANKING

A Large Bank Enriches its Customers' Experience and is in Compliance With an Integrated Solution



## BACKGROUND

This large bank is a leading provider of integrated financial services, including retail banking, business banking, institutional banking, funds management, insurance and investment. With over 4.6 million customers and over 1,100 branches nationally, they operate one of the largest financial services distribution network in their geographic region.

The Enterprise Services division delivers technology and banking operations services across the entire group. The technology teams provide innovative product platforms for customers as well as essential tools for business. The operations teams leverage technology to drive efficient and timely processing, an essential component of the customer value proposition. Core Banking Modernization, which aims to modernize existing banking legacy systems with a customer-centric platform, is just one of several key strategic programs within Enterprise Services.

The bank was using third party services to print and digitize customer communications, all of which were stored outside the bank. Due to evolving regulations, and stricter interpretation of existing regulations, the bank decided to bring these services in-house.

### The Challenge

The bank began searching for a solution that would improve access to letters, statements and other regulated financial correspondence across both internal systems and online channels. For example, it was difficult for business customers to download monthly statements across 20 accounts because it required 20 different download requests. In total over 25 different types of customer communication needed to be archived and presented digitally.

In addition, the solution need to support legacy report archives, like BMC Control-D, which stores and distributes internal bank reports. An integrated solution was envisaged that would support both internal and external information types.

### The Solution

After an extensive search, the bank selected EMC's InfoArchive and Crawford Technologies' PRO Archive products.

- EMC InfoArchive provides the archive platform to store high volume content and provide search interfaces into this information for online access
- Crawford Technologies PRO Archiver transforms and indexes high volume customer communications produced as AFP content and prepares it for storage in InfoArchive. Documents are then rendered to PDF for easy viewing

## At a Glance

### CrawfordTech Product:

PRO Archiver for InfoArchive

### Objective:

- To bring customer communications archiving in-house to ensure compliance with evolving regulations and improve the customer and staff online experience.

### Challenge:

- Over 25 different types of customer communications, including legacy report archives, needed to be supported and presented digitally.

### Solution:

- The bank selected EMC's InfoArchive to store high volume content in conjunction with PRO Archiver to transform and index communications, producing AFP content for output and rendering to PDF for online viewing.

### Results:

- When the implementation is complete, staff and customer access will be improved with enhanced usability, and customer data will be protected using the latest encryption techniques.



An important requirement was supporting the Payment Card Industry Data Security Standard (PCI DSS), which requires that sensitive customer information is protected. PRO Archiver's encryption features allows content to be stored on disk using industry standard encryption techniques that can then be retrieved quickly for use.

## Results

The bank is preparing to switch over from 3rd party archiving services to in-house services in 2017. The new service will better support current banking regulations, while providing opportunities for reducing the costs of operational archiving services. Staff and customer access will be improved with enhanced usability, and the data will be protected using the latest encryption techniques.

EMC InfoArchive provides a platform that not only supports immediate needs for high volume customer communications archiving, but which in the future will also support data archiving and legacy application decommissioning using the same platform. Crawford Technologies PRO Archiver provides the enabling features that turn InfoArchive into a platform capable of storing and presenting high volume customer correspondence.

## CrawfordTech Solutions

Crawford Technologies develops software and solutions to help enterprises optimize and improve the secure and accessible delivery, storage and presentation of their customer communications.

With over 1,800 customers on six continents, Crawfordtech solutions and know-how enable the largest banks, insurers, healthcare providers, utilities and print services companies to use their existing technologies, documents and data in new ways. We help them navigate the challenges in leveraging legacy applications in the platforms and applications of the future.

CrawfordTech's products, services and domain expertise reside at the nexus of content, data, and output management and are essential components of our customers' digital transformation, output management and document accessibility strategies.