# Bank Transforms Document Management with Systemware

One of the largest financial institutions in the United States, serving customers across 15 states in the South and Midwest, sought to modernize its document management processes. The bank was using CA View/Deliver to capture, store, and retrieve reports, but its existing system posed several challenges.

## CHALLENGE

The bank faced several critical issues with its legacy system that prompted them to explore alternatives:

- **Cost:** The legacy system was expensive to maintain and operate, especially in terms of storage and licensing fees.

- **Speed of Capture and Retrieval:** The system was becoming increasingly inefficient, with slow capture and retrieval times negatively impacting operational workflows.

- **User Interface:** The outdated user interface and lack of web-based access made it difficult for users to efficiently navigate and retrieve reports.

## SOLUTION

The bank selected Systemware to replace CA View/Deliver, recognizing its capability to deliver a cost-effective, modern, and efficient document management solution. Systemware provided several key advantages over the previous system:

- **No More Archives:** Unlike CA View/Deliver, which required archiving old reports, Systemware enabled the bank to keep all historical reports online at all times. This eliminated the need for costly and time-consuming archive retrieval processes, allowing for immediate access to any report, regardless of its age.

- **Data Extraction Flexibility:** Systemware allowed the bank to extract specific report data into multiple file formats. This feature offered greater flexibility in how data could be accessed, shared, and analyzed across the organization.

- **On-the-Fly Indexing and Filtering:** One of the most significant improvements was Systemware's ability to filter and index report data dynamically. Users could easily search, sort, and drill down into specific data within reports, reducing the time spent manually searching through large documents.

- **Automated Report Delivery:** Systemware's automated indexing and report delivery significantly streamlined the bank's workflow. By automatically distributing indexed reports with relevant data to the appropriate users, the bank reduced manual processing and ensured that employees received their important data promptly.

- **Improved Report Search and Retrieval:** Systemware's modern interface made finding reports much easier and faster. Its advanced search capabilities and user-friendly, web-based interface provided a seamless experience, drastically improving productivity.

By switching to Systemware, the bank achieved the following benefits:

- **Reduced Operational Costs:** With all reports online and no need for archiving, the bank saw a significant reduction in storage and system maintenance costs.

- **Increased Efficiency:** Faster report capture and retrieval meant that employees could access the information they needed in real-time, improving operational workflows and decision-making.

- **Enhanced User Experience:** The modernized, web-based interface allowed for easy navigation and an improved user experience, making report retrieval a simple task for all employees.

- **Automation and Flexibility:** Automating report delivery and offering flexible data extraction and filtering options streamlined reporting processes, ultimately reducing manual tasks and increasing accuracy.

This large bank successfully modernized its document management infrastructure by transitioning from CA View/Deliver to Systemware. The shift resulted in cost savings, enhanced efficiency, and a better user experience, supporting the bank's goal of driving operational improvements while reducing the complexity of report management. Systemware's innovative features—such as on-demand access to historical reports, automated delivery, and data extraction—positioned the bank for continued success in an increasingly digital financial environment.

# About Systemware

Systemware helps the world's largest and most regulated organizations simplify infrastructure, reduce costs, improve workflows, and meet governance requirements. Our intelligent content services platform enables users to locate and deliver information in the exact context needed, across public, private, hybrid, and IBM zSystems environments, including a fully hosted SaaS option. That's why many of the world's top financial institutions trust us. Let's discuss how we can help you.

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