Case Study: Washington State Bank

Banking and Finance

Tech-savvy, small-town bank implements SpoolFlex™ for daily report management.

No more manual bursting, copying, or distributing. But most importantly: *no more waiting*.

Overview: Finding a way out of the paper nightmare

Washington State Bank always embraced technology. So when the time required to burst, copy, and distribute 100+ reports on their IBM iSeries platform crept up to two hours per day, WSB naturally looked for a technology solution.

But where could they find an answer to their problem that satisfied all of their requirements, but didn't cost a fortune? The solution had to be:

- Cost effective
- Simple to implement
- Easy to modify

Furthermore, the solution had to deliver their reports without any of their employees actually having to *touch* the reports. And the reports had to be easy to access.

SpoolFlex™ by DRV Technologies (www.drvtech.com) fulfilled the bank's requirements. According to Steve Bohn, Vice President of the Ag and Commercial division at Washington State Bank, the report management software is now converting 75% of the spool file reports to PDF and saving them to a server. Bank employees can access daily reports – and request their own special reports – with a single click from a PC desktop.

Customer Profile: Washington State Bank

Washington State Bank (www.washsb.com) in southeastern Iowa, which is 85% locally-owned, prides itself on knowing its clientele and quickly responding to their needs. In a town of 7,000, WSB has over 8,000 customers.

Unlike the stereotyped image of a rural town business, WSB keeps up with the technology and services its customers expect. It offers clients online banking from its Web site, including bill paying and access to check images.

Problem: Too much information on too much paper

Every day Steve Bohn arrived at the bank ready to work. But first he had to wait for 2 or 3 people to distribute the previous day's reports. Although the bank's core processing software (from Jack Henry & Associates) provided a wealth of data consisting of 135 reports (ranging from 1 to 200 pages), Bohn was fed up. "It was frustrating to have all this information on the

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Customer Profile

Washington State Bank
Washington, Iowa

WSB is a rural bank with a technological edge. Their customers have access to the bank's Web site with online banking, bill pay, and check images.

But WSB's reports were being held hostage – and the ransom needed to print and distribute them demanded 10 hours of labor and three boxes of paper every week.

Existing Technology

IBM iSeries platform running Jack Henry & Associates bank core application software

Objective

Washington State Bank wanted to reduce the amount of time required every day to burst, copy, and distribute its IBM iSeries reports.

Solution

SpoolFlex by DRV Tech

Benefits

Converts reports to PDF, Excel, HTML, and Word.
Distributes reports to file servers or via email.
Bursts reports into separate reports or combines

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computer that could only produce paper reports that would take even more time to manually distribute."The reports, printed on 17" wide green-bar paper, had to be burst apart and sometimes reduced in size on a copy machine. And then there was the collating, stapling, and manual distribution to upper management.

Cost in …	Weekly	Yearly
Staff Hours	10 hours	520 hours
Paper Expense	$150	$7,800

Solution: Recommended by another satisfied DRV customer

Since Bohn and another employee share the responsibility for the bank's technical operations – and neither have a technical background – it was especially important that the solution was easy to set-up and modify.

Luckily, Bohn mentioned his problem to Matt Ritter at Clear Lake Bank & Trust in Clear Lake, Iowa. Ritter's bank also uses Jack Henry software and was recommended SpoolFlex.

"He just said it was a great thing." Bohn was also impressed when the banker mentioned this: "He was able to pay for it based solely on paper savings alone."

After receiving SpoolFlex, Bohn got himself up to speed using DRV's documentation and online training Webinars. After one day, SpoolFlex was converting spool files to PDF and storing them on a server for management to access. WSB now converts 75% of their spool files to PDF.

Although WSB still prints some reports on their IBM 6400 printer, it's saving between $7,000 and $10,000 per year in paper and printer ribbon cost. Other savings not as easily measured include recouped employee hours. For example, in the past, employees would have to visit the bank's basement, where reports were archived, and search for a hard copy of an old report. Now they can just open an Excel spreadsheet with hypertext links to the PDF reports.

Just Two of the Many Ways SpoolFlex Helps Washington State Bank

SpoolFlex converts customer bank statements to PDF. Before, it was difficult to print or search for information in the 1,000-page spool file. But with the spool file converted to PDF, customer service can search it by account number.

SpoolFlex helps WSB conform to auditing and compliance requirements. Once a report is converted from a spool file to PDF, the PDF is configured with an "Approved/Reviewed" button the employee selects to indicate he has read the report. This information is saved with the PDF file – and available whenever an auditor requests.

Evaluation

Says Bohn of SpoolFlex's flexibility with data, "You can take it and sort it based upon parameters you set up." In fact, Bohn admitted that he wasn't taking full advantage of all of the features in SpoolFlex, but has since implemented FormFlex to print and deliver electronic bank statements to their customers.

"It's like having a secretary. Someone that grabs the reports, makes copies, and distributes them. It's faster, it's quicker, and certainly much cheaper."

"The employees who used to take a couple of hours a day making these copies and distributing them now don't do anything with those papers.

So it's the efficiency and ease of having that information distributed wherever I want every morning."

"We set up some links on users' desktops and they can go in and view their reports without any effort at all."

SpoolFlex is not difficult. I'm not a programmer … it's easy to use."

Steve Bohn, Vice President
Washington State Bank

DRV Technologies has over 20 years experience developing superior, affordable document and report management software on the IBM System i (formerly AS/400) platform.

DRV's exceptional customer support and software development staff is located at our corporate headquarters in suburban Atlanta, Georgia, USA.

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The bank's loan-processing and customer service personnel are relieved, too. They spend less time handling reports and more time doing the jobs they were hired to do -- processing loans and keeping the bank's customers happy with shorter lines.

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