

1st Summit Bank Invests in Foxit Ultraforms



Like any member of a growing institution, Joe Ivock, Data Center Officer, wears many hats. He runs all the computer systems and mainframe for 1st Summit Bank, while also handling everything from the Automated Clearing House (ACH) department to the imaging department.

As part of leading the imaging department, Ivock was tasked with creating all the bank's fillable forms on its software, Adobe Acrobat Pro. That amounted to upwards of 75 forms that required imaging, maintenance and updating.

What made the situation more complex was the software they moved to for advanced imaging didn't have straightforward data capture. And, at the same time, adding that feature on the Acrobat side was price-prohibitive.

"We got new imaging software called Synergy that provides cutting edge document imaging, but it was missing something we needed," says Ivock. "We found that there was too much work going into getting the documents imaged. We had to have someone scan them in and then key in all the information off of every document manually."

Ivock started researching alternatives and thought that barcoding—generating a 2D barcode onto a form that contains the variable data entered into the form by the end user, which can then be quickly scanned and captured into databases or applications—was the right solution, yet he faced obstacles. "Originally I tried to use Adobe barcoding, which works fine as long as the user has Acrobat Pro. But if they're using something else, like Reader, it doesn't work because Adobe required every computer to have an Acrobat Pro license. That meant an expenditure of at least \$150,000, so we were dead in the water."

Frequently recognized as one of the best regional banks in the United States, 1st Summit Bank has expanded to 16 locations with more than 200 employees. Although it has a modern data center, digitizing documents with the bank's high-end imaging software was taking too much time, especially when it came to having to manually enter data. When Adobe's software proved inflexible and costly, the bank turned to Foxit Ultraforms—and couldn't be happier.

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Ivock continued to search for a solution. “I looked at different software online and met with another company I had found, then discovered they couldn’t do what we needed. I began to think it wasn’t possible. But once I found Foxit, I was able to test out the system and everything worked great.”

The Foxit account manager was patient and helpful, Ivock adds. “It took a couple of months to get internal approval for the deal but Foxit even gave us a money back guarantee to help make it happen. We bought one perpetual Ultraforms license and paid for Foxit to create 10 forms for us, but it was so easy, I was able to do it on my own so we got a credit back.”

Today, the bank integrates Foxit Ultraforms with Adobe Reader to create internal forms that are changing continually throughout the day as internal staff open up new accounts and add options for different customers. “We have Ultraforms working for three specific uses,” explains Ivock. “Barcoding a unique ID number, the date, and the account number.”



Ultraforms does it all behind the scenes immediately, which enables 1st Summit Bank’s booking department to finally be caught up. “Our booking department did this when they had spare time, which meant they were always about two months behind. Now it’s not such a burden anymore. Users can scan 50 different documents in and they’re indexed automatically. Now it takes 5 minutes. We’re real time.”

Ivock also likes the improvement to data accuracy, too. “When you’re manually doing something you’re going to make mistakes. There were times we’d scan something and then we couldn’t find it because the number was backwards or mistyped. Not anymore.”

As for what Ivock learned during the selection and implementation process, he says the greatest revelation was how easy Ultraforms really is to use. “Ultraforms is so simple that the Foxit rep who trained me probably spent 10 minutes with me. And then I was able to generate all my forms within two days.”

Looking to the future, Ivock foresees other possibilities for Ultraforms, too. “We’re just starting to do esignature documents now. Someday soon, we want to be able to send documents to a customer so they can open it as a PDF and sign it immediately. I can see putting a bar code on so whatever comes back, we just quickly index it and get it into the system. That’s our future, thanks to Ultraforms.”

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