

foxit

FIRST AMERICAN BANK

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BANK

CASE STUDY

Challenges

First American Bank was searching for a PDF solution which enabled automation of business processes and enhanced organization of paperwork in order to reach the goal of being a paperless office. Since the intent was to deploy this solution across all the units of the bank, it was necessary to standardize on a single, trusted provider that fulfilled the entire organization's need, and had an easy licensing model.

It was critical for the First American bank to find a PDF solution that included efficient content management features, allowing staff to scan, view, convert, annotate, and organize their PDF documents at any time. In addition to these features, it was also important for the bank to ensure the protection of their information - therefore the selected solution needed to have a robust security implementation. And, as a final requirement, it was essential for the PDF solution to perform well in Citrix environments.

"Ninety-nine percent of the users at the bank work with Citrix desktops. As a result, finding a PDF solution that worked within a Citrix environment was a primary requirement for our team," said Dave Duchaj, Senior Vice President at First American Bank.

First American Bank is an Illinois-chartered, privately held, full-service bank with nearly 50 Chicago area locations and more than \$2.5 billion in assets. The bank has the strength and stability that comes from a consistent, diversified earnings stream, strong internal equity generation, sound asset quality, and a liquid and conservative balance sheet.

Foxit PDF Editor

The IT team had already used Foxit PDF Reader and its great performance within Citrix desktops caused them to consider Foxit a prime candidate for this project.

"We added Foxit PDF Editor to our base installation and tried it out performing routine daily tasks. The solution worked really well for printing/converting a document into PDF and to organize and combine multiple PDF documents together," said Duchaj. "Organizing PDF files was done in seconds just by dragging and dropping pages from the page panel."

Foxit PDF Editor was implemented on all Citrix servers covering all the bank's units displacing several competitive products. Foxit is used for different purposes and tasks – for example, loan officers use it for creating electronic loan packets by scanning and converting them into PDF. Other departments integrate document images into a PDF document, create compound PDF packages, and then securely email them to their customers. As a result, it was very easy for the bank's staff to share information with their customers and for them to review their various bank issue documents.

Additionally, having a single PDF solution for the entire organization made it much easier to transition to a new product. The already familiar ribbon-based user interface of Foxit PDF Editor sped up the learning curve of employees when using the new product.

"The great customer service provided at Foxit made of this implementation less painful than it could otherwise have been. The support team has always been fantastic, friendly, fast, and very easy to work with," said Duchaj.

Conclusion

Foxit PDF Editor is a versatile, multi-feature editor that has revolutionized workflows across First American Bank. Among other benefits, it is enabling the bank to do:

- Embrace paperless office workflows
- Work with PDFs in a Citrix environment
- Create, organize, combine and email PDF packages to their customers.



"We couldn't be happier with our decision to deploy Foxit PDF Editor across the entire bank", said Duchaj. "It has proven to be the right solution for us."