



# Bank of Ireland Finance

**Development and deployment of a document output system to produce customer facing documents from data residing in a legacy application**

**Bank of Ireland Finance required the development and deployment of a document output system to produce customer facing documents from data residing in a legacy application. This solution was developed for a Windows NT 2000 platform but has recently been upgraded to a Windows 2007 server running in a virtual environment. It was required to produce substantially lower maintenance costs compared with the previous incumbent system.**

## **Background**

Bank of Ireland Finance produce thousands of documents every day varying from renewal notices, customer letters, contract documentation, account statements etc.

The data for all these documents resides in an AS400 legacy based system. Traditionally an application called AS400 Office Vision produced all documents from the legacy data.

IBM announced changes in its support of the Office Vision product which BIF found unacceptable. However due to the critical nature of this document production to BIF's business, they could not afford to rely on an unsupported application.

At the time it was decided by BIF that this document production function needed to be migrated to a Windows NT 2000 platform to ensure the stability of this mission critical task. The system has since been upgraded and migrated to a Windows 2007 platform..

## **The Solution**

Ergo took a partnership approach to the project, working with Bank of Ireland Finance to improve document presentation and efficiency. It deployed Adobe Central Pro Output Server, developing a number of document templates and data manipulation scripts to enable BIF to quickly and cheaply produce more dynamic documents.



**“Ergo provide us with a full printing solution for our customer correspondence. This enables us to provide a professional finish to all our customer correspondence which is a key component of our customer-focused ethos” Martin Noonan, Bank of Ireland Finance**

BIF had already worked with Ergo to deploy Adobe Central Pro Output Server to facilitate its secure cheque production system. Adobe Central manipulates the raw data from legacy systems and populate that data into predefined templates developed by Ergo.

The system involved the development of data manipulation scripts to process legacy data for use in Ergo's predefined dynamic templates, which can now be outputted in PDF format, electronic fax, e-mail or directly to a printer. Ergo also developed Optical Mark Recognition (OMR) Manager to automate postal room services such as variable insertions and folding. “We implemented the solution in such a way as to release a range of additional functionalities and benefits to personnel across the company and to BIF's external agents and brokers,” said Peter Masterson, development team leader with Ergo, specialising In Output Technologies.

“The Adobe Central Output Server extracts and merges the data. Templates are created in Adobe Output Designer. The documents include statements, invoices, schedules and so on.” According to Masterson, one of the major benefits of the system is that BIF staff can make immediate changes to interfaced products, creating an impressive customer-facing set-up. “The customer gives us a file of data, for example, letters. We take a piece of that data and we write a script, changing it and putting it into a template,” he said. “If they need to change anything, all we have to do is change the template. This can be done quickly”.

### **The Benefits**

The benefits of the project are, said Masterson, numerous. “It means that BIF's mission-critical document production is fully supported on the most recent Windows platform and has delivered significant savings in support costs,” he said. “BIF's remote agents and brokers can produce documentation quickly, allowing them to close deals more quickly than ever before.”

In addition, said Masterson, the new system means that BIF can “successfully back” the leasing services of numerous agents, providing documentation in the livery of each individual agent. “It has helped BIF's remote brokers and agents to produce data rapidly, saving time when it comes to closing deals,” he said. “The Customer Service Team can retrieve and review historical documentation from their desktop. “The introduction of OMR markings has also delivered efficiencies in BIF's post room. For example, they have avoided pre-printed stationary and can create more up-to-date customer facing documents. “Image is being improved all the time.

The system we installed is able to change -- to modify -- for the customer. It is more streamlined. “We train the staff on what is involved with the system. Our work with BIF is more of a partnership, so if anything goes wrong, BIF are trained on how to solve it.” Martin Noonan, IT delivery manager with Bank of Ireland Finance, said the new system had resulted in substantial cost-savings. “Ergo provide us with a full printing solution for our customer correspondence.

This enables us to provide a professional finish to all our customer correspondence which is a key component of our customer-focused ethos” said Noonan.

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