

## Success Story from Kodak



# Mountain West Financial implements advanced imaging system, featuring **Kodak** Capture Pro Software and **Kodak** Scanners

Mountain West Financial, Inc. in Redlands, California is a full-service, privately held mortgage banker that processes a tremendous volume of paperwork. With paperwork for each loan running between 500 and 1,000 pages, the Mountain West Financial team processes more than 12,000 documents per day.

Their existing processes were time-consuming and labor-intensive, as all documents were manually sorted in-house. Some documents had barcodes, but many didn't—which meant staff had to identify them, affix their own labels, and then index and stack the documents. With over 225 different document types, this was no easy task.

Susan Hartsock, Information Technology Coordinator for Mountain West Financial, knew there had to be a better way. “We were looking for a capture solution that would automatically identify documents instead of us having to do it manually,” Hartsock explains. “We weren't happy with our existing solution, and we wanted to streamline and make the whole process more efficient.”

### Finding the components of a smarter solution

After experimenting with two other solutions, Mountain West Financial found the ideal combination of **Kodak** Scanners, **Kodak** Capture Pro Software, and **Ephesoft** Mailroom Automation Software. The firm is currently using two

**Kodak Ngenuity** 9125 Scanners, a **Kodak** i1420 Scanner, and a **Trüper** 3600 Scanner, all backed by **Kodak** Service & Support.

These scanners work with **Kodak** Capture Pro Software to get documents into the system quickly and efficiently. Digital files with barcodes are automatically sent to the proper locations, while documents without barcodes are pushed to the **Ephesoft** Software for identification and processing. **Ephesoft** Software reads every sentence on the page and uses both the words and the order in which they appear to identify the document type. This is a unique approach—and one that was perfectly suited to Mountain West's needs.

### SITUATION

Mountain West Financial, Inc. sorts, indexes, and scans over 12,000 documents each day and stores them in individual loan files. Existing imaging solution lacks desired automation and productivity features.

### OBJECTIVE

Automate and advance the imaging process; reduce time and effort spent sorting and barcoding documents in preparation for scanning.

### SOLUTION

Combination of **Kodak** Capture Pro Software and **Ephesoft** Mailroom Automation Software, along with two **Kodak Ngenuity** 9125 Scanners, a **Kodak** i1420 Scanner, and a **Trüper** 3600 Scanner, all backed by **Kodak** Service & Support.

### COMMENTS

“We're saving time, labor, money — and even trees, since we don't have to put labels on every document now. The solution is very intuitive and our end users love it because it's fast and reliable.”

– Susan Hartsock,  
Information Technology Coordinator  
for Mountain West Financial, Inc.

The **Böwe Bell + Howell** Scanner Division was acquired by Eastman Kodak Company in September 2009. The **Ngenuity** and **Trüper** Scanners are now marketed under the **Kodak** brand.

"The combination of **Kodak** and **Ephesoft** made for a perfect symphony of products. By using **Kodak** Scanners and Software to identify those documents with barcodes and **only** pushing unknown documents to Ephesoft, we were able to get two things done for the price of one: minimizing the use of the OCR server engine, while maximizing the scanner capture software," explains Steve MacWilliams, Senior Vice President of DocuSource, the Authorized Reseller of **Kodak** Document Imaging Products that recommended the solution to Mountain West Financial. "Other solutions push all documents to a single server where they are processed serially, while ours is a parallel solution, which is a very cost-effective solution for this client."

### **A smooth, timely installation and implementation**

Installation of this advanced solution was easy, since both **Kodak** and **Ephesoft** Products are very intuitive to configure.

"This was one of our finest installations—the speed is superior, the setup and configuration were straightforward, and **Kodak** Capture Pro Software was very easy to integrate," says MacWilliams. "It's very well-engineered and works with a variety of scanners."

Hartsock agrees: "With our previous solution, it took between four and seven hours to install a workstation. With Kodak, it takes about five minutes!"

The implementation schedule was accelerated—from the development to the purchase to setting up the software. "The original setup of 169 document

types took less than one day," notes Don Field, CEO of Ephesoft. "You can definitely do more with the right software—and this is a very stable system. It's great for Mountain West Financial, Kodak, and Ephesoft."

Today, Hartsock finds it easy to create new document types herself, which is essential because in the mortgage industry, regulations and forms constantly change.

### **Kudos for Kodak Service & Support**

Mountain West Financial already owned other **Kodak** Scanners, so they were familiar—and very happy—with **Kodak** Service & Support.

"Whenever I call, a live person answers the phone and I get help right away," says Hartsock. She compares Kodak to a previous vendor, "When I'd call, I'd have to go through all these different divisions, and then end up reinstalling the workstation anyway. After a while, it was actually easier to reinstall a workstation than call their support line!"

So far, the company hasn't had any issues with the scanners, and staff has found **Kodak** Capture Pro Software very easy to use. They've gone from having four full-time people prepping documents and two people scanning documents down to just the two scanner operators. That's a labor reduction of **66 percent**.

### **Bottom line: imaging system delight**

Mountain West Financial is extremely pleased with the results of their document management solution. Scanner operators



are reporting up to 95% accuracy, and they're also excited about the quality of the images and the image enhancements that Kodak's Perfect Page technology brings to their documents automatically. Previously a good deal of rescanning and manual document improvements were required, a process that was complicated and time-consuming.

Hartsock is also thrilled with the savings: "We're saving time, labor, money—and even trees, since we don't have to put labels on every document now. The solution is very intuitive and our end users love it because it's fast and reliable."

Because of the significant labor savings, Hartsock expects to see a return on investment for the entire solution **within six months**. Eventually, she wants to get retail branches and brokers involved to help move closer to the goal of a paperless process. "This solution has been a sea change for us. We're moving toward paperless workflow, and we've opened doors for scanning on the front end. It's all very, very positive."

"The ROI was compelling to the customer because of both the reduced annual maintenance of other software products and certainly the reduced staff time and labor," MacWilliams concludes.

#### **To learn more:**

[www.kodak.com/go/docimaging](http://www.kodak.com/go/docimaging)  
Contact your Authorized Reseller of **Kodak** Products  
Or call 1-800-944-6171

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