

Client Success Story

KnowledgeLake's Cloud Helps Texas Bank Streamline Document-Related Processes

Client Profile



FEATURED CLIENT

Vantage Bank Texas

INDUSTRY

Financial

LOCATION

San Antonio, Texas

Founded in 1923, Vantage Bank Texas is a family-owned, community-based financial institution offering a full range of banking products for consumers and small and medium-sized businesses in Fort Worth, the Rio Grande Valley, San Antonio, Laredo, El Paso, Hondo and Refugio.

WEBSITE

www.vantage.bank

“We were looking for a way to streamline our business processes for storing and retrieving documents ... KnowledgeLake's integration with O365 and SharePoint online, and previous track record, were the driving factors in our decision.”

– **Danny Knudsen,**

*Vice President and Solution Design & Development Director,
Vantage Bank Texas*

BUSINESS NEEDS Vantage Bank Texas, a family-owned, community-based financial institution, was looking for a way to streamline their business processes for storing and retrieving documents. In order to reduce physical storage and make relevant documentation quickly available to users—at the precise time it was necessary within their applications—they wanted to transition away from paper files and implement standard indexing practices.

Initially, Vantage Bank Texas had deployed an on-premises KnowledgeLake Capture Server Pro solution to make use of existing infrastructure. But, over time, they encountered some difficulties with a hybrid environment. When Knudsen heard about KnowledgeLake's transition to a cloud-first offering, they ultimately decided to move to the KnowledgeLake Cloud.

“The transition to the cloud has been quite successful. The implementation team made the switch very easy and seamless for the end users,” says Danny Knudsen, Vice President and Solution Design & Development Director.

KnowledgeLake, which integrates with O365 and SharePoint Online, was a good fit for Vantage Bank Texas since they already had an established partnership with Microsoft.

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We want to be able to take advantage of the latest functionality as soon as we can, especially as it pertains to API integrations. We are looking forward to making use of the KnowledgeLake APIs to further integrate the solution into our other applications. We are going through our own internal transitions to the cloud, and the KnowledgeLake Cloud fit into those initiatives very nicely.”

– **Danny Knudsen**, Vice President and Solution Design & Development Director, Vantage Bank Texas

SOLUTION The KnowledgeLake platform is currently being used by Vantage Bank Texas’ Lending and Treasury Management teams and is supported by multiple back-office departments. The solution is used as part of their customer onboarding and renewal processes to connect required, customer-provided, documentation to the various approval processes.

Vantage Bank Texas scans and uploads many different document types to SharePoint Online, and makes use of LOB system connections to provide data lookups that allow the user to quickly index those documents for later retrieval. All documents go through a workflow process to ensure accuracy of indexing and provide a second level of indexing information.

BENEFITS KnowledgeLake’s Cloud platform has allowed Vantage Bank Texas to significantly improve the efficiency of their document-related processes by providing a single point of entry for their content along

with intelligent connections to LOB systems. It has also given them an easy, standardized way for their users to get many documents imaged, indexed, and stored in their ECM system. Additionally, transitioning to the KnowledgeLake Cloud will allow Vantage Bank Texas to “offload infrastructure support and customize integrations with KnowledgeLake through the API,” Knudsen says.

Through the deployment of the KnowledgeLake Cloud platform, Vantage Bank Texas has also found in KnowledgeLake a dependable go-forward partner—thanks to a proven dedication to product improvement and customer support.

“**We have found the KnowledgeLake systems to be very reliable and the support to be extremely responsive ... KnowledgeLake’s Cloud and new API offering show they are committed to improving and establishing themselves as our go-forward partner.”**

– **Danny Knudsen**, Vice President and Solution Design & Development Director, Vantage Bank Texas



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