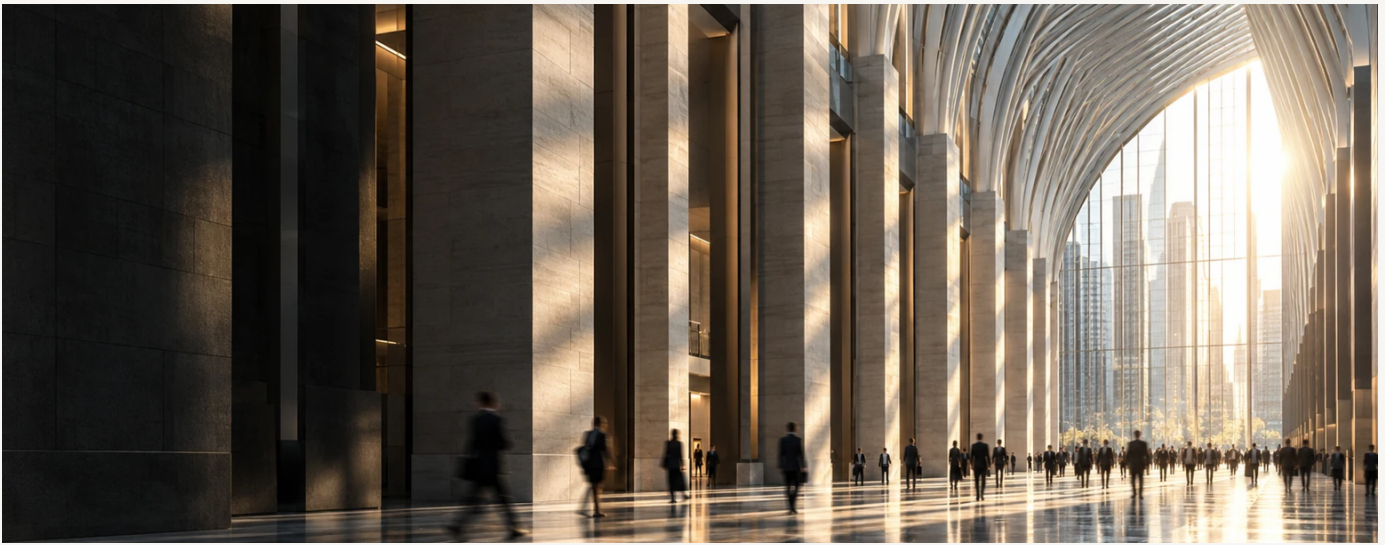


Bank of America

A comprehensive view of mortgage
data and documents



Illustrative image - Intellective Unity

Bank of America needed a consolidated view of all mortgage data irrespective of the source repository. Bank of America partnered with Intellective to provide a solution which is a single interface to access all critical information and documents in an intuitive contextual view in order to reduce processing time and improve the client experience.

The business challenge

Bank of America is a full-service banking and Financial Services Corporation with assets in excess of \$2 Trillion and more than 245,000 employees. It offers a broad range of services including personal and business banking, wealth management, and mortgage lending services.

Bank of America wanted to improve the efficiency of mortgage reviews, approvals, and related customer service levels. To achieve this meant combining data from multiple legacy systems and content repositories into a consolidated, flexible, and intuitive user experience. The solution needed to be end-client facing as well, making security of the utmost importance.

Bank of America turned to Intellective for both industry experience in banking systems and procedures, as well as technical expertise in integrating disparate systems into cohesive and effective solutions. In addition, they chose to leverage the Intellective's Unity Suite as a highly configurable and flexible user interface with enhanced security and entitlements features.

The Unity tools have become the foundation of their Document Management Portal for Mortgage Origination and Management. The solution provides a fully integrated set of features to bank employees as well as end customers. These capabilities provide a flexible, intuitive view of a clients combined data irrespective of source, providing enhanced customer insights and world-class client support through a single 365 degree view of client accounts, data, documents, and requests.

Empowering clients and employees

Providing clients and bank employees instant insight to all aspects of a clients accounts and requests. One source. One unified view.

Bank of America utilizes the Intellective Unity Suite including Intellective's zero footprint Viewer (zViewer). Intellective Unity provides the flexible user interface, search capabilities, and data normalization required for consistent access across a wide array of sources and legacy systems. Additionally, the Unity Intelligence Engine (UIE) provides an enterprise-class index optimized for rapid, insightful searching, using common terms for both employees and clients.

In addition, zViewer provides a no-install method of accessing, viewing, and reassembling documents including support for HUD document formats.

Bank of America leveraged the Intellective Unity Suite for the following capabilities:

- Instant integration to legacy business systems
- Single low-latency query across multiple source systems
- Rapid configuration and deployment of new solutions and enhancements to existing solutions

- Consistent method for access of mortgage documents, metadata, and in-process work across all repositories and systems
- zViewer for zero-install viewing of documents and redaction of sensitive information from within a browser
- Custom connectors to systems of record
- Display of mortgage origination content in Stacking Order
- Use of entitlements via SSO-enabled role-based security

The system is ubiquitous for the banks mortgage employees and clients alike, providing immediate access to the data required to make informed decisions immediately.

Today, Bank of America has more than 35,000 employees utilizing the Unity based Document Management Portal daily, as well as all mortgage customers for access to account documents and data. In addition, improvements to the solution continue with new features intended to streamline processes further and empower users.

The incredibly flexible, configurable Intellective Unity user interface, with connectors to most major ERP, CRM, ECM, Process, and Legacy platforms, allows Bank of America to deliver a consistent, meaningful user experience to employees and constituents alike.

For more information

For more information on how Intellective and Unity can help your company achieve its vision, please contact your Intellective representative or Business Partner, or visit: www.intellective.com

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