



Windows Vista Customer Solution Case Study



Customer: Town & Country Bank
Web Site: www.tcbankutah.com
Customer Size: 1 PC
Country or Region: U.S. Southwest
Industry: Financial

Customer Profile:

Town & Country Bank is a new Southern Utah community bank providing a suite of concierge banking services for retail and business-related customers.

Software and Services:

- Microsoft Windows Vista Ultimate SP1
- Microsoft Office 2003 Professional

For more information about other Microsoft customer successes, please visit:
www.windowsvistaexperience.com

Windows Vista Accelerates FDIC Compliance Document Management for New Bank

"I create and manage content for more than 60 different compliance manuals required by the FDIC. Instant Search helps me find and juggle all of the information sources for this on-going task."

Don Boshard, Senior Vice President, Town & Country Bank

What does a Mini Cooper, a new community bank and Windows Vista have in common? Nimble navigation. Town & Country Bank in St. George, Utah offers curbside concierge service (courier banking) to its retail and business patrons. Its loan department was also looking for a new level of document handling for FDIC compliance manuals— well accessorized with reliable security features. Windows Vista Ultimate with SP1 is proving a genuine performer.

Business Needs

Starting a new bank is a challenging task. The Federal Deposit Insurance Company (FDIC) provides strict oversight through a volume of regulations and creation of compliance documents among other things. In fact, Town & Country Bank must create and manage over 60 different FDIC compliance manuals, the specific job of Don Boshard, senior vice president in charge of the task.

"Not precisely maintaining the contents of each compliance manual invites a response from the Federal regulators," said Boshard. "We must be able keep track of new

information and integrate it into our documents. The FDIC expects compliance and we demand it of ourselves as well."

Typical compliance manuals include detailed documents for loans, funds available, security for computers, employee manuals, the Security Bank Act, etc. With so many manuals to manage, document version control becomes a potential problem too. Further, each manual is subject to normal semi-annual audits from the FDIC so documents must be both up-to-date and accurate.

Information security is a top priority as well. Not only does information on computers



need to be secure, but the bank must insure Internet access is safe.

Solution

Using the IT expertise of ProNet, a well-established industry resource for over 3,000 U.S. financial institutions, Town & Country Bank designed its computer network with all of the backup, redundancy and security features necessary. New Windows Vista features are also providing additional built-in user capabilities.

Instant Search

From the Start menu in Windows Vista, Boshard can find virtually anything on his PC with fast-as-you-can-type performance. As he types, Windows Vista instantly searches file and application names, metadata, and the full text of all files, and it displays the search results organized by the type of asset.

BitLocker Drive Encryption

Drive encryption protects Boshard's data by preventing unauthorized users from breaking Windows file and system protection on lost, stolen or inappropriately decommissioned computers. This protection is achieved by encrypting the entire Windows volume.

Windows Aero-Flip 3D and Thumbnail Images

Boshard uses the START+TAB keys to initiate the 3-D view, then flips through open windows by using arrow keys or the scroll wheel on his mouse to quickly identify and select the one wanted. Also in Windows Aero, live taskbar thumbnail images display the actual contents of both windows that are currently open and those that are minimized.

Shadow Copy

This feature automatically creates point-in-time copies of files as Boshard works, so he can quickly and easily retrieve versions of a document he may have accidentally deleted.

Shadow copy is automatically turned on in Windows Vista and creates copies on a scheduled basis of files that have changed. Boshard can easily access this feature by right-clicking a file or folder and selecting "Restore previous versions."

Dynamic Security Protection

Internet Explorer 7 offers dynamic security protection to help defend against malicious software as well as new ways to protect users from unintentionally providing personal data to fraudulent websites that use deceptive practices such as phishing.

Benefits

■ Better Document Content Management

Instant Search provides more powerful document management.

"I create and manage content for more than 60 different compliance manuals required by the FDIC," said Boshard. "Instant Search helps me find and juggle all of the information sources for this on-going task."

"The original content for all of the compliance manuals was created without the use of Instant Search," said Boshard. "But weekly maintenance, often as challenging as the initial work, is much easier because I can find and manipulate updates quickly."

New capabilities within Windows Aero interface provides easier navigation of multiple opened documents.

"Flip 3D and thumbnails images helps me better manage multiple open documents," said Boshard. "A mouse scroll or hovering over any document in my system tray makes my job a lot easier."

And Shadow Copy protects against inadvertently deleting data.

"Shadow Copy takes the worry out of accidentally making changes or deletes," said Boshard. "I can revert back or recover a previous document with a simple right-click of the mouse...whew!"

■ Increased Security Protection

Additional security features built into Windows Vista secures all laptop data for Boshard and protects his Internet experience as well.

"BitLocker acts as a 'safe' for all data on my laptop," said Boshard. "Every key stroke is automatically encrypted on my hard drive to guard against potential loss or theft."

"Safely navigating the Internet is vital to what I do," said Boshard. "Windows Vista and IE 7 provide additional protection against malware and phishing. It's simple and more secure."

■ Confident Software Compatibility

Windows Vista is compatible with Town & Country's existing line-of-business software.

"The Bakerhill loan analysis software and LaserPro loan origination software works perfectly with Windows Vista...just what we expected," said Boshard.