



Case Study: Global 100 Company

» The Challenge

Over time, financial organizations have built enterprise-class technology infrastructures. In some cases, these infrastructures were constructed due to mergers and acquisitions. Multiple branch and office locations make supporting this environment a logistical challenge, and can also prove costly to maintain. One large, global 100 'Company' in this situation needed a comprehensive solution for automating its fax, scan, and document distribution processes for its 30,000 worldwide employees. This print-based initiative would also need to reduce costs while meeting corporate and government regulatory obligations to track communications of its regulated employees.

The Company's corporate and government regulations require all forms of communication and document transmissions by regulated employees (those responsible for customer and corporate communications) to be secure, traceable, and readily accessible for auditing purposes. To meet these regulations, the Company needed to significantly enhance its fax infrastructure consisting of outdated stand-alone fax machines (and multiple ISVs) that could not support document capture and did not offer the enhanced security measures required for compliant communications. Although the Company had already invested in thousands of multi-function peripherals (MFPs) for copying and scanning, it hadn't leveraged these investments to incorporate faxing capabilities.

Previously, the process was extremely inefficient and costly. The Company's stand-alone fax machines required tens of thousands of dedicated telco circuits, each costing up to \$20 per month. Separate maintenance and supplies, such as additional toner and paper, added to the costs. The fax machines were also often underutilized, consuming valuable office space and energy. For users sending multiple faxes, these machines were extremely labor-intensive because they could not batch documents together. Using fax service providers, the Company paid a per-page fee for all internal/external and inbound/outbound fax traffic – a particularly costly service, since 60 percent of its faxes were sent to internal destinations.

Without transparency and auditability, the standalone fax machines provided an unmanaged entry point for unauthorized users to send or receive sensitive documents, leaving the Company vulnerable to unnecessary risks and severe penalties.

Consolidating the Fax Infrastructure and Meeting Compliance Requirements

Like most organizations, the Company had disparate fax infrastructures handled by multiple independent software vendors, each with a broad user base and existing application interfaces. Faxing stations were disbursed throughout the organization – separate from the Company's recently purchased multi-function peripheral (MFPs). For this reason, the Company was relying on traditional stand-alone fax machines and fax services that depended on costly hardware, maintenance, and supplies to support. However, none of the fax communications through any of these systems were being tracked or monitored providing no accountability for regulated employees. These systems also did not support any method of document capture or retention.

When the Company sought to improve its fax infrastructure and security/communications, it worked closely with a managed print service (MPS) provider. Their MPS provider consulted Omtool, the leading provider of document process automation solutions. The Company subsequently selected Omtool's AccuRoute® document process automation platform to capture, process, distribute, and archive all of its documents.

CLIENT REQUIREMENTS

The Company's infrastructure requirements called for the following functionality:

- ▶ Enterprise fax capabilities
- ▶ Consolidated resources through one IT-controlled infrastructure
- ▶ Secure inbound/outbound fax communications
- ▶ Use of existing networked MFPs
- ▶ Fewer ISV dependencies by deferring pay-per page charges for internal faxes
- ▶ Elimination of telco fax lines and associated costs
- ▶ One-touch button capable of sending multiple documents to multiple recipients
- ▶ User Authentication to ID regulated employees
- ▶ Delivery confirmation and detailed fax metadata (who, when, to whom, content, delivery status, etc.)
- ▶ Automatic archiving of text-searchable copies of all faxes
- ▶ High levels of usability with minimal transition or training

Enterprise-Wide Fax Infrastructure Consolidation and Compliant Communications

With the consolidation of its fax infrastructure, the Company achieved a significant and measurable return on investment (ROI) through:

- ▶ Elimination of telco fax circuits, each costing \$17-20 per month
- ▶ Reduction of maintenance and supplies such as toner and paper
- ▶ Reduction of office storage and energy consumption

With the adoption of Omtool AccuRoute, the Company and its regulated users increased their productivity and benefitted from the following secure fax communication enhancements:

- ▶ User authentication and validation to provide regulated employee accountability and corporate transparency
- ▶ User access control and MFP-hold features that provide standard access for sensitive and confidential documents
- ▶ User identification through personalized Routing Sheets and user-defined distribution lists
- ▶ Automatic formatting to text-searchable electronic copy
- ▶ Delivery confirmation
- ▶ Formatting for transmission and conversion to text-searchable PDF
- ▶ Archiving

AccuRoute integrated with the Company's fleet of network-connected MFPs. These MFPs replaced the traditional fax machines, reducing redundancy and cost. The devices were specifically chosen to integrate tightly with AccuRoute while providing a streamlined user experience, including one-button scanning when sending a fax.

» The Result

The Company was able to implement a comprehensive document capture solution and justify the acquisition cost solely through the savings accrued from consolidating its fax infrastructure and eliminating outdated telco circuits while meeting compliant communication requirements.

This new approach increased user productivity by standardizing processes through a consistent, enterprise-wide system with a common user experience. Training and use was simple and universal across the entire organization. Fax communications were more secure, auditable, and accessible than before. AccuRoute also increased productivity for compliance and record keeping, making it possible to automatically retain all records, rather than putting the responsibility on the user and business unit.

SUMMARY:

The Client now realizes the benefits of:

1. Reduced costs through fax network infrastructure and hardware consolidation
2. Full compliance for fax communications to avoid potentially significant fines
3. Extensibility to many document-routing workflows requiring multiple distributions, archiving, and security
4. Greater productivity through highly available and distributed MFPs
5. Lower costs associated with filing, maintaining, and accessing paper documents that are readily accessible in text-searchable formats

"The Company has been able to leverage their large-scale MFP deployment and their current fax infrastructure using Omtool's AccuRoute platform as the gateway for all their fax communications.

As a result, this Global 100 client saved millions of dollars within a year through the reduction of fax lines while addressing all of its corporate governance concerns. This has created the platform for all future document processing requirements."

A Trusted Partner in Enterprise Fax Solutions

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