



Case Study: Global Accounting Firm

» The Challenge

This top three global accounting firm's existing document capture solution was not able to handle the current volume of their scanning and OCR requirements (up to three million pages per month of multi-paged documents). When their existing scan solution became bogged down, the firm's productivity was negatively affected due to the enormous back-log of time-sensitive documents for tax clients.

» The Solution

This accounting firm has over 12,000 users who need to scan and OCR large volumes of multi-paged documents on approximately 1,000 HP devices across their 28 US-based offices. It was determined that Omtool's AccuRoute document capture and handling platform was the perfect solution to handle the firm's level of scanning volume and intensive document conversion

» The Result

In anticipation of the upcoming tax season, this accounting firm needed a complete solution, fully implemented within six weeks of signing the agreement to embark on this joint project. Today, the firm is capturing and processing their tax documents with Omtool's AccuRoute solution through network-enabled HP MFPs. HP and Omtool were able to provide a cost-effective solution, delivering electronic images of documents from the firm's remote offices to the corporate processing center within minutes. As a result, this accounting firm has the foundation in place to expand and provide greater user functionality to successfully address all of the paper-intensive business processes it faces on a daily basis.

QUICK LOOK

The Global Accounting Firm presented the following need/challenge:

- ▶ The firm needed a scanning and OCR solution to handle over 3 million pages per month using the firm's existing fleet of HP MFPs

Omtool® and HP® provided the following solutions:

- ▶ A complete document capture and routing solution within six weeks, in time for the firm's upcoming tax season
- ▶ More than 12,000 users with comprehensive document scanning capabilities using over 1,000 HP MFPs throughout the firm's 28+ US-based offices

Enterprise-Wide Fax Infrastructure Consolidation and Compliant Communications

The adoption of the AccuRoute® document 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

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

» 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 fax-related costs through fax infrastructure consolidation and the elimination of traditional fax machines
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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