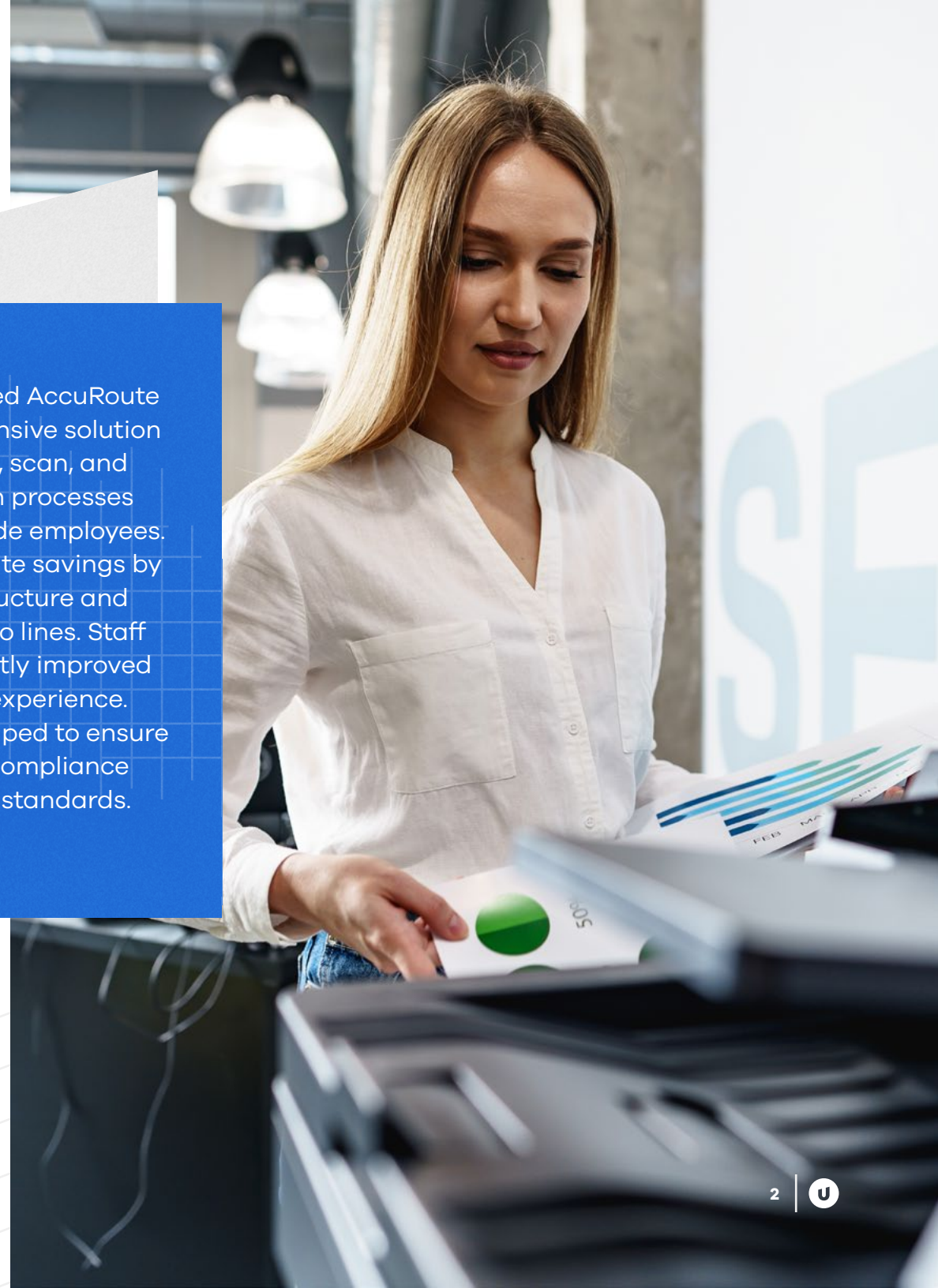**upland**

AccuRoute

Case Study

Global 100 financial firm upgrades fax to reduce costs and ensure security.

INDUSTRY
Finance

COMPANY
Global 100
financial firm

This financial firm used AccuRoute to create a comprehensive solution for automating its fax, scan, and document distribution processes for its 30,000 worldwide employees. The firm saw immediate savings by consolidating infrastructure and eliminating costly telco lines. Staff productivity also greatly improved due to a unified user experience. Finally, digitization helped to ensure audit-readiness and compliance with communications standards.

How can fax save the day when it comes to data security and compliance?

Outdated processes were costly and put this company's data at risk.

This large, global 100 financial firm wanted a comprehensive solution for automating its fax, scan, and document distribution processes for its 30,000 worldwide employees. The firm wanted to reduce costs, consolidate resources, eliminate outdated infrastructure, and ensure data security to meet corporate and government regulatory obligations that require all forms of communication and document transmissions to be secure, traceable, and readily accessible for auditing purposes.

AccuRoute was the centralized solution this firm needed.

The firm worked closely with a managed print service (MPS) provider who recommended AccuRoute as an ideal technology partner to implement the document capture, processing, distribution, and archival of all documents. The firm saw immediate cost savings through fax network infrastructure and hardware consolidation, as well as the elimination of costly telco circuts. By digitizing processes, the firm also had a full audit trail of communications to ensure compliance with regulatory standards.

"Within a year after implementing AccuRoute, we saved millions of dollars through the reduction of fax lines while addressing all of our corporate governance concerns. AccuRoute has created a standard platform for all future document processing requirements."

– IT Director
Global 100 Financial Firm

Upgrading to a modern capture and fax infrastructure was overdue.

The time to upgrade was "now".

In order to meet government regulations, the firm needed to significantly enhance its fax infrastructure, consisting of unsecured, outdated stand-alone fax machines that could not support document capture. Although the firm had already invested in thousands of multifunction peripherals (MFPs) for copying and scanning, it hadn't leveraged these investments to incorporate faxing capabilities.

Legacy hardware was costly and promoted unsafe practices.

The firm's stand-alone fax machines required tens of thousands of dedicated telco circuits, each costing $50 or more per month. Additional costs per machine included maintenance and supplies, such as toner and paper. For users sending multiple faxes, these machines were extremely labor-intensive because they could not batch documents together. The client 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.

What's more, without transparency and auditability, the stand-alone fax machines provided an unmanaged entry point for unauthorized users to send or receive sensitive documents, leaving the firm vulnerable to unnecessary risks and severe penalties.

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AccuRoute

Productivity went through the roof, all thanks to secure fax capabilities.

Now data is more secure than ever.

With the adoption of AccuRoute, the firm increased productivity and benefited from the following secure fax communication enhancements:

- User authentication and validation to provide regulated employee accountability and corporate transparency

- User ID 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

Fast integration, user adoption, and cost savings weren't the only perks.

AccuRoute integrated with the firm's fleet of network-connected MFPs, which were specifically chosen to work in conjunction with the platform to provide a streamlined user experience including one-button scanning when sending a fax. These MFPs replaced the traditional fax machines, reducing redundancy and costs while eliminating outdated telco circuits.

AccuRoute also increased user productivity by helping the firm to standardize processes through a consistent, enterprise-wide system with a common user experience. Training and daily use was simple and universal across the entire organization worldwide.

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.

Finally, with AccuRoute, this firm's fax communications are now more secure, auditable, and accessible than before, ensuring compliance with regulatory communication requirements.

Upland AccuRoute helps organizations accelerate business processes by allowing users to easily capture, process, deliver, and fax content from any device using a single, unified platform. AccuRoute automates data capture and extraction using optical character recognition (OCR) to securely process through workflows to applications, people, or storage.