

**Industry**  
Financial

**Solutions Implemented**

Reform Enterprise  
Modular Object Scanning Technology  
Tag Doc  
Captaris RightFax

**Processes Automated**

Fax, Email, Document Approval



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## **Major Bank Uses FabSoft's Solutions & Captaris RightFax**

### **MFPs are transformed into an enterprise fax & email system**

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#### **The Challenges**

One of the most renowned banks in the world has over 35,000 employees and 780 branches worldwide. They provide various services such as direct banking, savings, loans, corporate securities, foreign exchanges and overseas operations. Since these are such sensitive processes, it is crucial for this bank to handle them in the most secure and reliable manner. Previously, they were using ad hoc fax machines placed throughout the facility. Due to strict security measures, faxes had to be reviewed by an alternate employee before they could be sent. In addition to replacing this time-consuming fax method, the bank also needed a more efficient method to email and save documents internally.

#### **The Solution**

In order to improve the bank's processes, their standalone fax machines had to be eliminated since they were not suitable to handle the needs of such a large facility. These machines were replaced with Ricoh java-enabled MFPs equipped with FabSoft's Modular Object Scanning Technology (MOST), which allows users to specify document distribution right from the MFP display screen. To facilitate such a high volume of faxes, Captaris RightFax was implemented, a proven market leader in reliable fax software and solutions. MOST integrates with RightFax in order to provide very tight control over every fax.

First, the bank defined three global RightFax fax books, with each fax book associated to an active directory group. Each group has an assigned person that must review the fax before it can continue to be faxed to the destination. In order to fax a document, the user walks up to the MFP display screen and logs in to MOST. Using MOST, they can select fax cover pages or enter in subjects and additional notes. They can also search through and select contacts stored in their RightFax fax book. MOST will recognize the user upon login and present them with their associated fax book. The fax number of the recipient can also be entered manually if it is not in their fax book. Once the user is finished entering the fax destination information, the document is scanned. Upon scanning, the document is automatically sent to Document Authority Control (DAC), which is a web interface that enables users to view, approve and edit documents. DAC informs the appropriate person that a fax is waiting to be reviewed. The employee reviews the fax from DAC and once they approve, it is automatically faxed according to the information that was entered with MOST. In order to see if the fax has been sent successfully, the user can navigate to the MOST Status tab and view the current real time statuses of all fax jobs.

In addition to the faxing capabilities, the bank could use MOST to perform other document activities from the MFP as well. With MOST, documents can be scanned to email. Internal email addresses can be accessed and searched through by performing lookups and LDAP searches. The email body and subject can be entered, and upon scanning, the document is emailed accordingly. Additionally, users could scan and save documents right to their LDAP home directory. They can browse their directory structure right from the MFP MOST screen, select a folder, and the scanned document will be saved to that location. All PDFs can be password protected with 128-bit encryption and up to 30 characters.

#### **The Benefits**

- Scan documents to fax and email from the convenience of the MFP
- The MFP is transformed into a reliable and secure enterprise fax system
- Faxes are sent at a quicker rate than with standalone fax machines
- Users can browse their LDAP directory and select where scanned documents should be saved
- Documents are automatically routed to the necessary employee to review before they are faxed
- Convenient access to information stored in the RightFax fax book and internal databases