IMAGE ACCESS CORP

CASE STUDY

Intelligent document processing through AI orchestration with ImageTrust

ABOUT

When business units have a need for business applications or equipment - they rely on an IT Shared Services Group for advice and support. Such was the case for a leading Global Financial Services Firm operating in more than 60 countries and has over 240,000 employees, that was looking for a more efficient way to enable, deploy and support capture requirements for all lines of businesses worldwide.

Our client reached out to see how we could leverage ImageTrust to provide intelligent document capture services that simplify content processes. Whether content is structured, unstructured, handwritten, or typed, we deliver automation though AI orchestration.

COGNITIVE CAPTURE	FINANCIAL SERVICES	60 COUNTRIES	240k+ EMPLOYEES
Use Case	Industry	Location	Size

CHALLENGES

Supporting departments with a common document capture solution that was not flexible enough to meet volume, document variables and timeline requirements affected overall competitiveness and customer satisfaction - and became a major challenge. When changes were needed, the current solution had to be "customized" with specialized development, impacting responsiveness to business units needs, errors in processing documents and complexity of support.

- **Implementing a global common capture platform**
- **Responsiveness to customers and business units' needs**

TECHNICAL REQUIREMENTS

- Eliminate the need to install and support capture software on every user's desktop.
- Maintain performance and functionality equivalent to the current thick-client solution.
- Leverage existing investments in advanced capture and ECM environments.
- Enable capture of both scanned documents and e-docs.
- Allow users to capture documents continuously without waiting for uploads to complete.
- Ensure compliance with all internal and industry security standards for browser-based applications.
- Support easy implementation of capture across the organization as needed.
- Adapt quickly to new document types and processes.
- Centrally manage users, jobs, and document class definitions.

THE SOLUTION: TRUSTED INTELLIGENT CAPTURE

When this financial institution set out to identify a capture platform with tight integrations to line of business systems and applications which all departments could leverage globally, they reached to Image Access Corp., a long time provider of Capture and ECM Solutions.

The financial institution was seeking a capture solution that was web-based, as this would bring many efficiencies to implementing and supporting many users, document types and lines of businesses world wide. The solution had to be cloud friendly as part of the bank's policy to move all their infrastructure to the cloud. When evaluating other browser based solutions - performance and security issues prohibited implementation.

After going through a rigorous process to completely understand requirements, document types, user and World Wide Lines of Business needs, Image Access Corp's web based capture solution ImageTrust – was chosen as the capture platform. The Global Trade Department along with the Legal Department (Subpoena processing) were two of the first departments that went live with the new solution leveraging ImageTrust's unique functionality including the Automatic Redaction of Personal Identifiable Information (PII) solution.

RESULTS: AN EFFICIENT CAPTURE SOLUTION

> **"**
>
> *The reason we use ImageTrust is because it is web based - enabling us to easily implement and deploy capture to literally 100s of departments and 1000s of users.*
>
> *When a new document type is required, it can be implemented in a matter of a couple of days, not weeks. End-user support has become very cost efficient. Additionally, we feel Image Access is not only a vendor, but part of our team".*
>
> **I.T. Director, Shared Services**

Reduction in Errors

ImageTrust's user-friendly design reduces errors and improves quality across business processes.

Fast Implementations

With unified capture across applications and integration with a common workflow, service request processing is faster and more efficient.

Rapid Responsiveness

Creating and deploying capture jobs, projects, and new document types is 50% faster than traditional capture solutions, supporting over 160 internal departments.

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