

ADVANCED SOLUTIONS FOR
**FINANCIAL
SERVICES**

Retail Banks

Credit Unions

Investment Banks

Commercial Banks

Bank Offices and
Central Processing Centers



imageRUNNER
ADVANCE

ADVANCED SOLUTIONS FOR FINANCIAL SERVICES

Loan applications. Cash transaction reports (CTRs). Suspicious activity reports (SARs). There's no getting around it. If you work in the financial industry, you deal with paper and electronic documents all day — and you probably spend too much time tracking, distributing, and archiving them. Your operations may depend on traffic-heavy fax systems, legally mandated archiving, and labor-intensive integration between front and back offices. If that weren't enough, you have to worry about security too. What if confidential information is leaked or stolen, exposing your institution to expensive litigation or regulatory sanctions?

Canon offers a wide range of new hardware and software technologies to help financial services companies better manage, archive, distribute, and secure documents. Canon solutions can increase efficiency by automating workflows for loan applications and other processes. These solutions also help reduce manual errors during document distribution and enable financial institutions to meet client and regulatory requirements for confidentiality. The end result is more efficient and secure document processes for your business.



Streamline Document Distribution Processes

Most banks continually exchange forms and other financial documents with branch offices and outside companies. With so much incoming and outgoing traffic, fax lines get clogged, documents go missing, and valuable time is lost. The distribution of loan applications, wire transfer receipts, and other crucial records can also be labor intensive, involving multiple steps where errors can be made.

Canon offers a number of solutions that will help you overcome these challenges and more.

SENDING FORMS

We need to distribute many of our forms and documents via e-mail, fax them to multiple recipients, and archive them in our back-end systems. This is a very labor-intensive process that consumes both time and resources.

Execute Multistep Financial Processes at the Touch of a Button. Canon's Workflow Composer lets you quickly convert multistep financial processes into one-touch workflows.

With a single button, financial institutions can execute many tasks simultaneously such as scanning, faxing, e-mailing, archiving a document to a server, or even storing it to Advanced Box folders, a new file-sharing feature on imageRUNNER® ADVANCE devices. Workflow Composer buttons are fully customizable, so you can tailor them to your unique needs and processes.



BEFORE

Our staff was tied up, having to scan every hard-copy loan application, then faxing it to two separate loan officers, e-mailing it to four others, and storing it in our database.

NOW

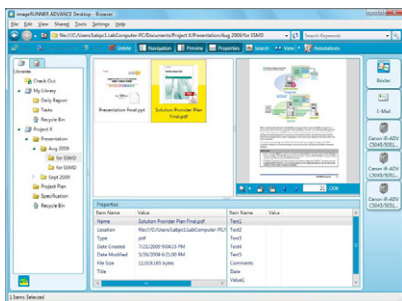
We save time and eliminate manual errors with one-touch buttons. Now we simply place the document on the device, press one Workflow Composer button, and all the sending, faxing, e-mailing, and archiving is done automatically.

PREPARING APPLICATIONS



To complete loan application packages and similar documents, we have to manually collate several files, including scanned forms, financial documents provided by the customer, credit reports, and more.

Sort, Find, and Combine Many Files into One Finished Document. With imageRUNNER ADVANCE Desktop, you can search for files in multiple formats and combine them into a single, comprehensive document. Desktop also allows you to drag-and-drop the file to fax, e-mail, or save to your PC or Advanced Box folder. Or you can print it using an array of professional finishing options.



imageRUNNER ADVANCE Desktop is an intuitive, easy-to-use PC application designed to complement conventional tools such as Microsoft® Office and Adobe® Acrobat®.

BEFORE

In several of our document processes we had to combine multiple hard-copy and electronic files. All the scanning, printing, and sorting took up too much time.

NOW

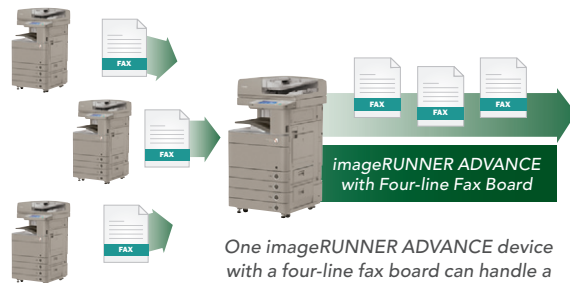
We improve our productivity by performing all these tasks remotely from a PC, within the intuitive interface of imageRUNNER ADVANCE Desktop.

FAX PRODUCTIVITY

In our bank, we exchange large volumes of faxed documents with branch offices every day. We need to ensure that fax lines remain open.

Always Have Fax Capability Ready. Many imageRUNNER

ADVANCE systems have the ability to offer up to four lines for faxing. Once an imageRUNNER ADVANCE device has been equipped with the optional Remote Fax capability and designated as a central fax distribution device, all other imageRUNNER ADVANCE devices on your network can share its four-line fax board. This enables a financial institution to save the cost of additional fax lines while providing instant faxing for everyone who needs it.



One imageRUNNER ADVANCE device with a four-line fax board can handle a large amount of fax traffic.

BEFORE

It was expensive to maintain underutilized fax lines at each regional branch.

NOW

We now reduce all those costs with one central imageRUNNER ADVANCE device that everyone, even those in the regional offices, can share. This allows us to maintain high productivity while paying for only the fax lines we need.

Improve Front-to-Back Office Document Processes

Banks and other financial institutions process and store huge volumes of documents. They need to quickly move these documents from hard-copy paper format to digital files so they can be distributed and archived for long-term storage.

Canon and its partners offer hardware and software solutions to help streamline these workflows, eliminating repetitive and labor-intensive tasks while making your office work more efficiently.



STORING FORMS

The loan application process is paper intensive. Prospective clients must fill out a range of forms that take up so much space. These forms also continually change.

➤ **Store Forms on Your Device.** The Advanced Box feature enables you to store a large volume of documents such as loan applications, credit report requests, and wire transfers right on your imageRUNNER ADVANCE device. These print-ready documents can be accessed and printed from that device or any other imageRUNNER ADVANCE system on your network. From a PC, you can access both the print-ready and native files.



Access print-ready documents such as forms directly from your imageRUNNER ADVANCE MFP, or from any other networked imageRUNNER ADVANCE device.

ACCESSING COMMON DOCUMENTS

We need everyone in our office to have easy access to the same documents.

➤ **Store and Distribute Documents with Your imageRUNNER ADVANCE MFP.** Advanced Box allows you to store documents in their native file formats on your device. You can place them in shared or password-protected personal folders and access them from your PC. This allows you to share documents with remote offices, exchange and collaborate with co-workers on files, and much more.



BEFORE

We spent much time ensuring that everyone in the office had the most updated version of privacy policies and other important documents.

NOW

We store important documents in their native file formats in an Advanced Box folder. Since everyone can access them, we only need to update those files once to ensure that everyone has the most up-to-date version.

ARCHIVING



We must ensure that the files from the documents we scan today will be searchable and readable many years from now.

➤ **Scan into an Archive-Ready Format Using Workflow Composer.** With imageRUNNER ADVANCE systems, you can scan and index hard-copy paper documents into PDF/A-1b files. This format stores all the necessary typographic and color information needed in a standard, future-proof file format that complies with industry standards.



imageRUNNER ADVANCE systems enable you to convert and archive documents into a file format developed to stand the test of time.

SCANNING & STORING DOCUMENTS

We need a better way to manage financial records and other documents. But isn't document management software only for big firms?

➤ **Document Archiving and Management for Everyone.** imageWARE Scan Manager provides an easy way to solve the problem of scanning and indexing large numbers of documents. Scan Manager can integrate with existing document management systems and can also link seamlessly with imageWARE Document Manager so that you can search, view, and collaborate on files with an entire office.

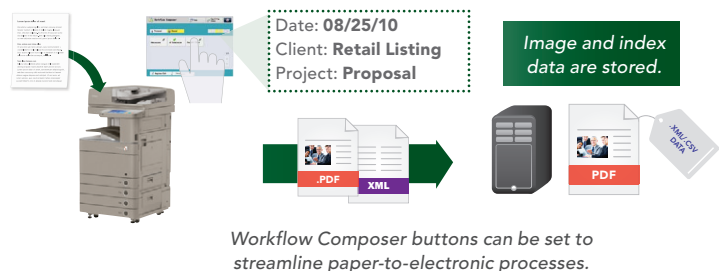


BACK OFFICE SCANNING

It takes a long time for our front office to convert hard-copy paper documents and forms into the electronic records our back offices require.

➤ **Easily Integrate Documents into Back Office Systems.** Workflow Composer with MEAP® Connectors or eCopy ShareScan can enable timely and convenient ad hoc scanning with customizable indexing and integration with practically any back office system.

Workflow Composer can also easily store documents in both Microsoft® SharePoint® Server (MOSS) and imageWARE™ Document Server.



BEFORE

We used a manual, PC-based scanning and indexing process to archive documents.

NOW

We save time with a one-touch button that scans the document, automatically asks for the relevant indexing information (the applicant's name and social security number), and then sends the information to our database.



Protect Your Devices and Documents

When banks lose confidential customer information, headlines appear in newspapers across the country. While you probably have security systems in place to guard your data, you may be leaving your multifunction devices vulnerable. Today, these devices often have capabilities rivaling those of desktop computers, making them a potential source of leaks.

Canon closes this security loop with a variety of solutions to ensure that private documents and information printed, scanned, or stored on your imageRUNNER ADVANCE system remain confidential.

PROTECTING CONFIDENTIAL INFORMATION

We're worried that contractors or temporary workers may gain access to confidential documents and use our devices to either copy them or send them to someone outside our bank.

➤ **Limit Device Access to Authorized Personnel.** Canon offers a flexible range of access solutions that can accommodate any existing card or password-based system. You can easily add your imageRUNNER ADVANCE system to your existing security solution or create a new one based on your own requirements.



RESTRICTING ACCESS & SENDING

Many of our employees make copies of or have access to send confidential financial documents to unintended destinations.

➤ **Stay Secure and Productive.** The Access Management System, which comes standard with any imageRUNNER ADVANCE model, enables you to establish access rights by specific user roles. Once set, Function Level Log-in can require authentication only for security-sensitive functions.

For example, you can allow anyone to make copies, but you can require that employees log in for access to the Send-to-E-mail, Send-to-Folder, and Send-to-Fax functions. You can also restrict sending documents only to approved destinations.

BEFORE

We were worried that our cleaning service or other unauthorized contractors might obtain documents with our clients' social security numbers and e-mail them from our office using our MFP.

NOW

We've closed this potential vulnerability with an imageRUNNER ADVANCE system that restricts which functions users can access.

SECURE PRINTING

We often print documents that contain vital personal information. How can we be sure that they aren't left vulnerable on the output tray?

➤ **Prevent Unauthorized Retrieval of Confidential Printouts.** Canon Secured Print and uniFLOW Secured Print require that a user authenticate at a device before a file is released for print. This helps prevent confidential information from accidentally lying vulnerable in a print tray.

BEFORE

Loan officers and other bank employees had to rush to a print device whenever they sent a job, or they had to send them to a device in a secure location.

NOW

With uniFLOW, they can send a job to any networked printer at any time. Then, at their convenience, they can authenticate and release it for printing directly at the device.



Reduce Needless Printing and Increase Productivity

Like any business, banks and other financial institutions must manage how and what they print to maximize productivity.

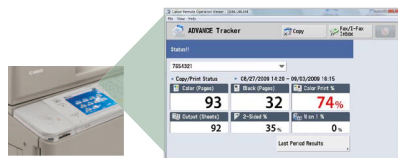
Excessive paper output, color usage, and personal copying and printing may lead to unnecessary expenses. Canon imageRUNNER ADVANCE devices offer a variety of ways to help you reduce the total cost of ownership.



PRINTING POLICIES

Everyone in our office prints whatever they want, whenever they want. They use far more toner and paper than they should.

Influence Positive User Print Behaviors. Canon imageRUNNER ADVANCE Tracker, a serverless application, helps you monitor, influence, and reduce wasteful user behavior on an imageRUNNER ADVANCE device. Tracker reinforces awareness of user output with customizable pop-up reminder screens on the user interface. It also monitors individual and group output activity through a Web-based application to help your financial institution manage costs.



BEFORE

Our paper and toner costs were sky high and we didn't know why.

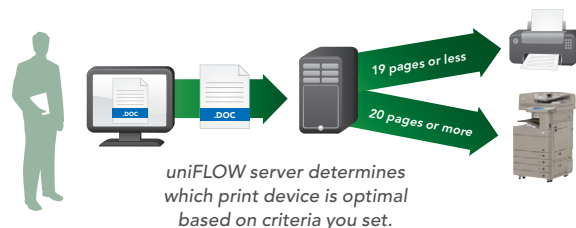
NOW

We've cut these expenses because we can understand and control who's printing what. This also helps improve our environmental efforts.

ASSESSING COSTS

We need a better way to gain insight into costs across our entire fleet.

Control Costs Comprehensively. uniFLOW Output Manager enables you to gain control over all print usage, even across a large organization. You can limit user access to more costly operations, route jobs automatically to less expensive printers, proactively manage your fleet, and create detailed analytical reports to identify areas where you can reduce costs.



BEFORE

Our audit department was using way too much paper but had no idea which personnel were responsible.

NOW

Analytical reports give granular insight into usage. We can now identify those departments or individuals abusing their privileges.

BEFORE

Too many of our bank employees and tellers were printing HUGE jobs on inefficient desktop printers.

NOW

We save money by automatically routing all print jobs of a certain size to the high-volume printers in our copy and print room.

Workflow Solutions for a Wide Range of Financial Organizations

Canon offers an extremely robust and wide-ranging set of financial workflow solutions, both on its own and through integration with third-party vendors.

Depending on your requirements, you may want to ask yourself some of the following questions:

- What are my specific financial workflows?
- How does my back office and front office scan, fax, copy, print, and archive day-to-day documents?
- What kind of documents does our financial institution scan, fax, copy, print, and distribute to our regional offices and customers?
- What are my bank branch managers' pain points within their document workflows?
- How do we secure our clients' financial data once we receive and distribute it internally and to other financial institutions?
- How do I control my printing and distribution expenses?
- What and where are the bottlenecks in our document workflows?

Meeting the Unique Output Needs of Your Business

In an era of relentless competition, business leaders look for solutions that simplify and improve critical processes within their infrastructure. Canon stands ready to offer in-depth knowledge, practical expertise, and field-tested technology when developing solutions for all your document-related challenges.

Whether you're considering hardware, software, or both, Canon Professional Services can help your team analyze and evaluate your existing processes, then partner with you to carefully implement integrated solutions linked to your business goals.



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