

# Regions Financial Corporation Consolidates Electronic Document Delivery and Management with Open Text Products

Combines Electronic Delivery and Storage for Fast, Reliable and Scalable Enterprise Solution



*"I can count on Open Text to help us remain up and running."*

– Gilbert Dela Garza,  
Systems Administrator,  
Regions Financial Corporation

Regions Financial Corporation is a full-service provider of retail and commercial banking, trust, securities brokerage, mortgage and insurance products and services. It is one of the Top 15 US banks with 1,300 offices and 1,600 ATM network locations across the Midwest and South.

## The Challenge

When Regions Bank and Union Planters Corporation merged in 2004 it created a new regional force in financial services as well as one enterprise with several different document delivery and management

solutions. All of the groups relied—and still rely—on fax to deliver high volumes of business-critical files such as loan closing documents, billing statements, purchase orders and more. Regions' data centers estimate handling 550,000 outbound faxed pages and 300,000 inbound pages per month. Though most departments within both organizations used a previous version of Open Text Fax Server, RightFax Edition, they also maintained a number of smaller fax servers and a few departments used other electronic products or fax machines.

For the departments who previously used fax machines, the process involved frustrating amounts of printing, waiting and filing. Some areas had several fax machines while in others, such as the call center, employees would often find themselves waiting in line at one fax machine. "People would get tired of waiting after 10 to 20 minutes, then run into busy signals," said Gilbert Dela Garza, systems administrator with Regions. On the receiving end, customers could wait hours for information.

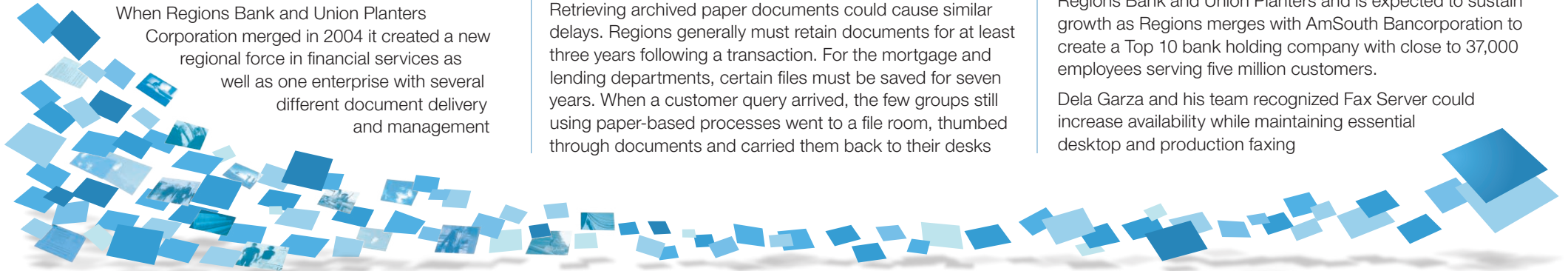
Retrieving archived paper documents could cause similar delays. Regions generally must retain documents for at least three years following a transaction. For the mortgage and lending departments, certain files must be saved for seven years. When a customer query arrived, the few groups still using paper-based processes went to a file room, thumbed through documents and carried them back to their desks

before returning calls. Departments using older versions of Fax Server or other competing products accessed the files electronically; however, keeping the files on each computer consumed huge amounts of drive space and affected performance, according to Dela Garza. "Users felt like they waited forever for faxes to display and this also affected server capacity." Additionally, storing faxes on individual desktop computers or laptops posed security risks. And, without server integration for back-up and redundancy, it could take up to a day to recover from a power outage or a server crash.

## The Solution

Regions has consolidated all of its fax and document storage products and methods into a single integrated and scalable Open Text enterprise solution. Together, Open Text Fax Server, RightFax Edition and Document Server, Alchemy Edition provide efficient document delivery, archiving and retrieval. The solution supported the 2004 merger between Regions Bank and Union Planters and is expected to sustain growth as Regions merges with AmSouth Bancorporation to create a Top 10 bank holding company with close to 37,000 employees serving five million customers.

Dela Garza and his team recognized Fax Server could increase availability while maintaining essential desktop and production faxing



capability. “As we grew, each area saw the benefits of using Fax Server,” he said. “We knew its potential and wanted to increase volume and use integrated capabilities.”

Regions consolidated its fax system into two load-balanced Fax Servers, housed respectively in its Tennessee and Alabama data centers. Each RightFax Enterprise Server has three remote board servers with 24 channels. Additional boards may be added as necessary. Fax machines have been eliminated, along with their associated telecom costs. Each department uses one fax number and also assigns Direct Inward Dial (DID) numbers to individuals. Using the Connector for Lotus Notes, employees send and receive faxes from within their email Inboxes. Regions is also installing the Web Access, PDF, Integration, and InternetLink Modules. These add-ons allow users to manage faxes using a Web browser, to convert PDF files to fax format as well as automatically send and receive application-generated files from dissimilar systems—including Regions’ mainframe and FileNet systems. Among other deliveries, the Regions interstate billing department conducts automated after-hours processing for 50,000 documents every day. The documents are sent via the Fax Server least-cost routing feature.

Further extending its Open Text investment, Regions implemented Document Server in late 2005. “Our faxes are now stored on the Document Server using a back-up SAN disk rather than on separate computers eating up disk space,” Dela Garza said. To ensure security, archived faxes are assigned to individuals by a Regions data security group—so that only designated personnel can access each file. Tight security using SSL and Open Text Document

Server Web Access Module also enables Regions to post documents for customers to access via its Web interface.

## The Results

Employees no longer wait in line to use a fax machine or struggle to use the separate fax products. “With desktop access and high bandwidth on our integrated Fax Server servers, they can send documents and not worry about busy signals or outages,” Dela Garza said. For high-volume output, Fax Server automatically directs transmissions to available fax boards. In the case of a server crash, users are redirected to another server, reducing any outages to only a matter of minutes. Fast and reliable information returns happy customers, according to Dela Garza. “Customers are not waiting hours for faxes, now they receive them immediately or within minutes.”

When needed, archived faxes are also accessed more quickly using Document Server. “Smaller groups that still handle paper and walk to file rooms are moving to Fax Server and Document Server,” Dela Garza said. For instance, the credit card disputes area plans to purchase scanners and use the Document Server Scan Module to capture paper documents into the Document Server repository. Using OCR and the Document Server search features, employees will find documents within minutes rather than days, Dela Garza estimated. “And by moving the files from individual computers to its server, Document Server displays information more quickly and keeps our systems running at full capacity all the time,” he said. As an administrator, Dela Garza appreciates knowing he can “count on Open Text to help us remain up and running.” On the enterprise level, the

integrated solution has proven flexible and scalable to meet growing needs.

## The Profile

**Customer:** Regions Financial Corporation

**Industry:** Financial

**Business Solution:** Open Text Fax Server, RightFax Edition; Open Text Document Server, Alchemy Edition

**Business Challenge:** Following a merger, the company owned several fax and document storage solutions; manual processing and lack of integration caused unnecessary expenses and delays

**Integration:** IBM Lotus Notes, mainframe system

**Results:** Retrieves customer documents in minutes compared to days; delivers documents to customers in minutes instead of hours; virtually eliminates fax server downtime; increases Fax Server performance by archiving faxes to Document Server

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