

IF IT WORX, IT'S



More case studies



CASE STUDY with FileStream

Finance | Pensions | Insurance

A focus on security issues experienced by a finance and pensions company. This study explores how security issues can be overcome using FileStream

UTAX solve major data security breach within a finance and pensions company, using FileStream.

The Security Issue

A large Finance and Pensions organisation based in the UK discovered that their internal security systems were not sufficient.

This was because the client ID used to access individuals' pension portals was validated using customer names, which meant their system had no way of differentiating between customers with the same name.

As a result, customers were finding themselves accessing pension portals of other individuals with the same name as them. Clearly, this was a huge security breach which needed to be rectified.



The Solution

UTAX understood the urgency of the issue, and knew that using FileStream would be an effective way of resolving the issue. FileStream was able to use new algorithms which enabled it to use individuals' NI Numbers instead of their name to validate their client ID. With everyone within the UK having a different NI number, this ensured there was no possibility of the client ID being duplicated.

UTAX were instrumental in improving our internal security and rolling out new software

Migration to FileStream took less than

1 WEEK

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Have you or your customers had a similar experience? If so, give us a call on **01793 783 298** to see how UTAX can help improve your secure processes.

100%
successful

100%
effective

Secure processes help ensure your business thrives



About FileStream

FileStream is document management software that is able to expand and adapt to your business needs. It provides efficient and secure document management for small businesses and cloud-based services. All documents are encrypted, have audit histories and RBAC (Roles Based Access Control) making it secure and GDPR compliant.

FileStream allows you to build complex workflows to ensure the right information is distributed to the right users at the right time. It can be tailored to your needs precisely using a Rule Manager, enabling you to generate workflows that make sending documents, questionnaires for data collection, access rights for departments automatic, writing off the risk of human error.



Benefits

- ▶ Quick and easy document storage
- ▶ Improve communications, improve service offered
- ▶ Roles-Based Access Control (RBAC) for businesses to determine access rights
- ▶ Application Programming Interface (API) which can communicate across multiple systems
- ▶ Design it around the business processes and needs
- ▶ Automated workflows to improve efficiency
- ▶ Electronic signature module greatly improves administrative procedures and security



file stream
PARTNERS IN DOCUMENT MANAGEMENT

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