



# Streamline

A Special Guide on Multifunction Products and Fax Server Software

Will Your Company Benefit from  
Consolidating Devices with Enterprise Fax  
and Multifunction Products?



Quit wasting your time and budget doing the paper shuffle. Automate document delivery with RightFax and you could save over a dollar per document. Deliver vital business documents via fax, email or the Internet. Securely. Reliably. Efficiently.

Some of the biggest names out there use RightFax to streamline business information delivery—including all of the Fortune 100. Perhaps even your competitors? So, go ahead, watch the savings stack up—not the paper and overhead. With RightFax. The right way to deliver business information.

You didn't get the memo?



# Streamline

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## **Will Your Company Benefit from Automating Document Delivery with Multifunction Products?**

One of the big trends within organizations today is to consolidate printing, scanning and copying services on a centralized Multifunction Product (MFP) to save valuable time, resources and office space. If you have ever managed multiple printers, scanners and copy machines you know that consolidating these services provides substantial advantages.

Although you can recognize substantial returns from consolidating these services, you may still have other office equipment draining your limited resources—the stand-alone fax machines and fax modems scattered around your organization. Plus if you haven't integrated fax server software with your MFPs, not only are you wasting time and money, you are also behind trends in technology consolidation. Fax server software combined with your MFPs and other business applications does the job more quickly and efficiently so your employees can be more productive. It also does the job more securely and accurately at a much lower cost.

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## Fax Server Software: What It Does

Today's fax server software gives organizations the flexibility to electronically send and receive documents via fax, email or over the Internet using a central server integrated on their network. Fax server software processes inbound and outbound faxes and stores them on the server. Among other functions, it can track fax history, add fax billing codes, route incoming faxes to groups or individuals fax or email Inboxes, provide fax cover sheets, supply notifications and fax broadcasting.

In addition, today the most versatile fax server software offerings extend network faxing capabilities beyond the desktop and email. They integrate with ERP, CRM, host, legacy, document management and other business applications to automate distribution of documents such as purchase orders, invoices and statements. They also integrate with MFPs to provide easy walk-up access to network faxing directly from the device, thus enabling organizations to centralize faxing, printing, scanning and copying functions.

## The Benefits of Combining Fax Server Software with Your MFPs

Implementing fax server software for e-document delivery has countless benefits. Some of the top benefits gained from integrating it with MFPs include the ability to:

### 1. Control Costs by Consolidating Resources

A single fax server can support many MFPs around your organization. This allows you to further consolidate resources and reduce costs by eliminating multiple stand-alone fax machines, modems, phone lines and associated supplies. This also offers a cost-effective, timely alternative to expensive and/or slow postal or express delivery services. Combine this with features such as least-cost routing and secure email or Internet delivery, which can dramatically reduce long-distance phone charges associated with faxing, and combining a fax server with your MFPs, can have a significant impact on revenues and costs. In fact, organizations are known to reduce their document delivery costs by over 50 percent simply by adding enterprise fax and e-document delivery capabilities into their office environment.

**2. Improve Office Productivity** By making it fast and easy to fax from MFPs and other applications employees use daily, your employees don't waste time using multiple devices to fax, print, scan and copy. Instead, they can conveniently fax right at a central MFP or from their desktop or other business applications. This reduction of manual processes translates into sizable improvements in productivity, not to mention more timely communications with customers and suppliers.

**3. Extend Infrastructure Investments** By combining network faxing capabilities with MFPs you can maximize your document output devices and achieve higher utilization of network resources. In addition, fax servers extend their value beyond MFPs by integrating with email, CRM, ERP, document management, workflow and other applications to make a more efficient, connected work environment. Such extensibility results in a rapid payback on an affordable investment.

*“Once they have RightFax, they wouldn’t think of giving it up. With RightFax, we now process several loans in the time it used to take to process just one.”*

—Billy Wilson,  
Network Specialist,  
BOK Financial Corporation

### ***Snapshot:***

Bank of Oklahoma (BOK) Financial Corporation integrates RightFax with their MFPs to improve productivity and enhance information security.

### ***Background:***

BOK Financial Corporation is a multi-bank holding company based in Tulsa, Okla., with offices in six states. BOK’s trust company subsidiaries are responsible for \$15 billion in assets.

Processing thousands of loan applications, fund transfers and other financial documents required hours to feed paper transmissions, wait for confirmation, then organize the piles for filing. In 1997, BOK installed Captaris RightFax to cut the time and stress out of managing communication. In the years since, they have combined RightFax with their multifunction scanning products and other business applications resulting in substantial cost and productivity benefits.

### ***The Challenge:***

To contact customers across six states, BOK needed a reliable and secure communications medium, and found fax server software the best choice. Until 1997, they relied on a combination of slow fax machines and fax modems to send critical and confidential information. This created a potential security issue BOK did not want to risk. In addition, BOK’s modems and stand-alone fax machines were unreliable and in constant need of service. Plus they were inefficient. Employees wasted time standing in line waiting to send a fax, or trying to re-send a fax when a transmission didn’t go through. Combine this with skyrocketing costs for paper, toner, supplies and phone lines for modems and BOK realized their faxing situation was unsatisfactory.

According to Billy Wilson, a BOK network specialist, BOK needed a secure fax server to safeguard the personal and business financial materials BOK faxed. It also wanted a cost-effective solution that saved employees time, offered flexible integrations with other applications and maintained reliability with minimal administration.

### ***The Solution:***

To solve the faxing issues at BOK, Wilson researched numerous solutions. He found RightFax was the only choice that fulfilled BOK’s required criteria—and then some. Today BOK operates five RightFax servers in four locations and services close to 900 users who view it as a mission-critical. “Once they have RightFax, they wouldn’t think of giving it up.

With RightFax, we now process several loans in the time it used to take to process just one.” says Wilson.

**Security**—Wilson opted to use Direct Inward Dial (DID) routing to ensure security of confidential faxes. Rather than piling up on fax machines to be misplaced, incoming pages are automatically delivered directly to recipients, who then can electronically store important documents.

**Flexibility**—RightFax allows employees to fax from their desks, rather than wasting time at fax machines. “RightFax was the only solution that could do such a wide range of faxing with a wide range of applications,” Wilson said. The solution fax-enables BOK’s Microsoft applications, Iris mainframe system and other solutions. RightFax is also integrated with their multifunction scanning products for integrating paper documents into messaging and document management systems. According to Wilson, “Using the solutions together has substantially increased our faxing capabilities. We’re able to scan images and fax them quickly with RightFax.”

**Productivity**—Because employees can send and receive faxes at their desks with RightFax they can now process several loans in the time it used to take to process one. This saves time, increases productivity and allows employees to respond more quickly to customers. According to Wilson, “Saved time can be a competitive edge. With RightFax, you get that time.”

**Reliability**—According to Wilson, “Working in IT, what I love about RightFax is that once you put it out there, it works without babysitting. It’s one of the few products I’ve been able to stand firmly behind because it works so well.” RightFax has proven reliable even with a dramatic increase in fax traffic and is superior in handling growth as BOK has expanded its customer base. In 2001, Wilson reported 49,000 pages; 2003 returned almost 180,000 pages for only the first few months of the year.

**Affordability and Returns**—BOK realized a return on its RightFax investment immediately. According to Wilson they obtained ROI within the first year. He estimated RightFax saved them thousands of dollars monthly in supply costs alone.

**Manageability**—Centralized management of multiple servers significantly reduced maintenance time, leaving Wilson and his team to focus in other business areas. “Also,” Wilson offered, “the support we’ve received from Captaris has been excellent. It is timely and accurate...and RightFax will stay with you until any problems are resolved. That is worth a lot.”

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## 4. Safeguard Security and Corporate Compliance

Sarbanes-Oxley, HIPAA, Basel II and other regulations have made safeguarding information security and accuracy essential. Using a fax server to send and receive documents is an easy way to support corporate compliance. It performs as a centralized hub on the network and electronically distributes information as tamper-resistant documents directly from MFPs and other business applications. The best fax servers also offer features that let you track fax history, assign access permissions, provide delivery confirmation, route incoming faxes automatically to recipients and provide certified and encrypted delivery. All these capabilities increase accountability, support compliance and eliminate the need to worry about lost or missing faxes by providing automation, control and audit trail.

## 5. Fax Servers Reduce Administration and

**Maintenance** Fax server software allows administrators to consolidate faxing services on the network. Administrators do not need to waste time dealing with multiple fax modems, phone lines or stand-alone fax machines. Centralized and easy-to-use administration tools make ongoing administration simple.

### Fax Servers For e-Document Delivery: Do You Need One?

Do you need a fax server? According to Maury Kauffman, managing partner of The Kauffman Group, a consulting firm specializing in fax server technology, if a 25-person organization manually faxes just 30 two-page documents daily, it's squandering 1,000 man hours a year. "That equates to one employee spending six months each year printing documents and feeding fax machines," explains, Kauffman. By providing easy walk-up access to faxing from your MFPs you can reduce time-consuming inefficiencies even more.

Eliminating stand-alone fax machines, fax modems, phone lines and associated supplies also provides significant cost savings.

The numbers above are impressive if you think about the number documents that go through your business every day. And they do not take into account the incalculable cost of even one vitally important fax that is lost or misplaced.

Another industry expert, Peter Davidson of Davidson Consulting, calculates that labor savings from using fax server software alone in a large company can exceed \$100,000 a year. In addition, companies that use fax servers to automate delivery of high-volume, batch-oriented documents such as purchase orders, invoices and statements can reduce document delivery costs by more than 50 percent.

Will your organization benefit from using fax server software for e-document delivery? Most firms with more than 25 employees sending faxes probably need fax server technology; those with more than 50 definitely do.

*RightFax reduces costs and improves efficiency and security by streamlining document delivery processes.*

- ✓ General correspondence
- ✓ Loan applications
- ✓ Order confirmations
- ✓ Proposals
- ✓ Sales literature
- ✓ Invoices
- ✓ Notices
- ✓ Promotions
- ✓ Purchase orders
- ✓ Statements

## Monthly Costs of Manual Fax Machines

Number of Existing Fax Machines	100	500	1,000
Analog Line Cost (approx. \$35 per fax machine)	\$3,500.00	\$17,500.00	\$35,000.00
Device Cost (approx. \$45 per fax machine)	\$4,500.00	\$22,500.00	\$45,000.00
Maintenance and Supply Costs (approx. \$30 per fax machine)	\$3,000.00	\$15,000.00	\$30,000.00
<b>*Total Estimated Monthly Cost to maintain manual fax machines</b>	<b>\$11,000.00</b>	<b>\$55,000.00</b>	<b>\$110,000.00</b>

\* These costs reflect estimated average monthly expenses associated with manual fax machines. Implementing enterprise fax server software eliminates these costs, and typically pays for itself in 3 to 6 months.

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## Choosing Fax Server Software For Your Organization

Choosing the right fax server software can be overwhelming because every manufacturer claims to be the leader, with every product seeming to have “Yes” checked in every column of a reviewer’s feature comparison chart. If you’re about to make a substantial investment in an installation, you probably wonder how you make an informed decision about fax server software before committing yourself.

**1. Research Fax Server Technology** It’s simple: ask the right questions; get the right answers. As computer-based fax server technology has matured, so has fax server software. Fax server software provides more than just network faxing. Now fax servers provide a base platform for e-document delivery via fax, email or the Internet, as well as secure and certified delivery options. Remember that all products are not created equal. Some features touted as available in a product are executed so differently in real application that they are hardly comparable without in-depth research.

Where do you start your research on fax server technology? Trade shows, Web sites, online computer magazines and other industry-magazine reviews will help you pinpoint fax server products.

**2. Determine Your Faxing Needs** The next step is to evaluate your company’s faxing needs. When selecting a fax server, saving time, leveraging hardware investments, ease of faxing, and integration with applications you are already using should rate high on the list. Do your employees use MFPs for their scanning, copying and printing needs? Do your employees “live” in Outlook, Microsoft Word, IBM Lotus Notes or other desktop applications? Do you need to integrate faxing capabilities with ERP, CRM, workflow, archival and imaging applications? You’ll need an application that reliably supports the devices and software programs your organization uses most. By adding network-faxing capabilities to these MFPs and business applications you can extend these infrastructure investments to enhance productivity and reduce costs.

## 3. Determine Your Fax Server Software Budget

Finally, look at cost. What is the budget – both in hard costs to purchase a fax server software system, and in hidden costs such as the ability to leverage the hardware and software your company already owns? Ask how transparent the fax server software is for users. If it is difficult to learn and use, people will revert to old-fashioned, manual routines and potential savings will be lost.

## Fax Server Software Features To Ask About

When looking for a fax server software solution to support your document delivery needs and integrate with your MFPs and other business applications, there are some important features to consider.

## Tested and Certified Integrations with Leading MFPs

You will have the most dependable and cost-effective integration if you look for a fax server solution with tested and or certified integrations with leading multifunction product vendors. Find out if they have developed efficient integration tools that ensure that your implementation is reliable and easy to deploy and manage.

Ask if the vendor has partnerships and integrations with multifunction product vendors.

**Fax and Email Integration** Fax and email integration is vitally important because people already communicate extensively via email. Your solution needs to integrate fax with the email program your employees already use, for example Microsoft Exchange or IBM Lotus Notes. They should be able to fax from within the application and receive fax documents as attachments to email messages.

**Fax Server Integration with Back-office Applications** Leverage your fax server investment by looking for a solution that has proven and reliable integrations with all the applications you use to run your business. Does the vendor have strong partnerships and tested integrations with leading ERP, email, CRM, document management, imaging and workflow applications? Does your fax server take advantage of technologies that make it easy to integrate with your business systems?

**Single Fax Server Platform for Desktop and Back-office** IT departments are under increasing pressure to justify the value of any IT investment. Therefore, your fax server should give you long-term value and provide a platform for all of your document exchange needs. Can it provide convenient desktop faxing capabilities as well as automate delivery and receipt of documents generated from ERP, CRM, financial and other business applications? Is it robust enough to handle multiple users and integrate with multiple applications? What is the ROI?

**Routing of Faxes** The ideal fax server routes a fax over telephone lines, Internet, intranet, WAN and LAN environments, and directs incoming faxes to the appropriate desktop without human intervention.

**Least-cost Routing (LCR) of Faxes** Where do people send their documents? Is your business mostly local? Or does your company have branches and/or clients all over the country, even the world? According to Davidson Consulting, faxing can account for as much as 40 percent of a company's long-distance telephone costs. Ask about LCR, which automatically transmits faxes by the most economical path, taking

advantage of off-hour telephone rates for non-critical faxes and even bypassing commercial telephone lines altogether by using the Internet for international transmissions. Most developers offer LCR, but some have added enhancements that save even more time and money. Check to make certain you can customize LCR. If your company is in New York City but conducts a lot of business in Westchester County and Long Island, you already know that intrastate telephone rates can be higher than interstate. Can you tailor your fax server installation to route your faxes to your firm's fax server in Philadelphia or Boston, or to a third-party service provider to save telephone line charges? With some fax server products you can also customize LCR to optimize server installations at your branch offices. For instance, if your server in Atlanta has a busy fax queue, yet an associate there has prepared a critical outgoing fax, special rules within the fax software can assure the fax goes instantly from your Atlanta office to Chicago for transmission. The sender will not have to do anything to make this happen, and sender and receiver alike will be unaware of the routing change. They will know only that the fax arrived quickly.

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## **Fax Server Software with Multiple Document**

**Delivery Channels** With today's fax server software, fax should be just one of the methods for document delivery. Does the software allow you to deliver your documents via fax, email or over the Internet? Does your vendor have a plan in place to take advantage of new and expanding document delivery channels as technology evolves?

## **Fax Servers with Multiple Input Connectors and**

**Data Recognition Tools** Organizations today require business communications in many formats from desktop, ERP, CRM, financial, document management and other business systems. Look for a solution that provides the flexible data recognition tools needed to capture data from virtually any application. Companies also need to be able to integrate their fax server using technologies that fit their environment. Look for technologies such as Java, XML or Facsimile Command Language that provide powerful, flexible tools for integrating or customizing the solution specific to an organization's faxing and e-document delivery needs and environment.

**Fax Server Scalability** Think about your fax server from the perspective of both today and tomorrow. How many people will use it today? How many employees will your organization have five years from now? Organizations grow much faster than you think; nearly every company needs a scalable fax server (one that can grow as your company grows). Will the system you are considering let you build a modular fax server network, i.e., expand, add on and customize to meet your specific needs? Also, look at licensing. Is the number of users limited, which will necessitate replacing, or spending more money down the line for planned or unforeseen expansion?

**Fax Server Administration** Is the fax server program easy to install? To maintain? Is back up automatic? Will you have to shut down the fax server to back up or make changes, or will the system run 24x7x365? For your own convenience, is remote management possible? What is the fax server software developer's reputation for technical support? Judge this from magazine reviews, industry awards and success stories on companies' Web sites.

**Remote Fax Access** How many people do business away from the office? How important is it for them to have access to faxing while on the road? Does the program let users send, receive and manage faxes from their email mailboxes? Can they access their faxes from the Web? From a touch-tone phone? Be clear about remote-access capabilities of the fax software you are considering.

**Intelligent Fax Board Support** Fax boards vary in price and, as with all products, you get what you pay for. Does the fax server support intelligent fax boards? Intelligent fax boards cost more than modems, but provide hardware intelligence through advanced compression schemes that reduce fax transmission time, thereby lowering operating cost. They also assure a path for smooth upgrades in the future.

**Open Database** What kind of database does the solution have? Look for a solution with an open database architecture that supports the scalability, reliability, performance and interoperability needs of your organization.

**Fax Server System Security** Naturally, you want to assure that your company's fax documents are safe from prying eyes—both in-house and externally. All fax server products promise security, but you should make certain that passwords can not be read in plain text, and that password lists are inaccessible to other users. Ask about additional safeguards that ensure that a fax cannot go to the wrong number. Ask if the fax server lets you send documents as encrypted files or certified email to ensure the confidentiality of important communications. Also, check to see if the administrator can control access to billing codes.

**Cost Recovery** If the fax server software you are contemplating integrates with popular document management systems, work done by your employees may be automatically assigned billing codes—with time spent tracked and updated automatically. If billing codes are important to the way you do business, check that it includes this feature.

**Document Faxing** All desktop faxing systems can fax almost anything that resides on the desktop computer. But, what if a user needs to fax another document and wants to maintain formatting, graphics or signatures? Can you fax a variety of file formats? Make certain the faxing software you are considering supports more than message faxing.

**Fax Status and Notifications** The documents you fax are the lifeblood of your business so you need to be confident that they reach their destination. Ask what types of fax notifications are available with your solution. Can you receive fax status confirmations in your email or back to a host application?

After considering your organization's faxing needs you will come up with more questions, but with these, you are on the way to making an informed decision about the correct fax server software solution for you.

## For More Information

Captaris Business Information Delivery solutions help organizations of all sizes automate the information and document flow throughout the information lifecycle (capture, process, archive, deliver). With a comprehensive suite of software and services, Captaris helps organizations to grow revenues and increase profits while meeting compliance goals. Through a global distribution network of leading enterprise technology partners, Captaris has installed more than 90,000 systems in 95 countries in companies of all sizes, including the entire Fortune 100. For more information please contact us at [www.captaris.com](http://www.captaris.com) or +1.800.443.0806.

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Captaris Business Information Delivery solutions help organizations of all sizes automate the information and document flow throughout the information lifecycle (capture, process, archive, deliver). With a comprehensive suite of software and services, Captaris helps organizations to grow revenues and increase profits while meeting compliance goals. Through a global distribution network of leading enterprise technology partners, Captaris has installed more than 90,000 systems in 95 countries in companies of all sizes, including the entire Fortune 100. For more information, visit [www.captaris.com](http://www.captaris.com) or call +1.800.443.0806.

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