

DATASHEET

Workflow Wizard Powered by Teemplate

Improve Accountability, Efficiency and Control Throughout the Document Lifecycle by Extending RightFax with Powerful Workflow Capabilities

OVERVIEW

The RightFax Workflow Wizard, powered by Teemplate, extends RightFax with intelligent workflow automation capabilities that enable RightFax users to improve efficiency, effectiveness, control and accountability. The RightFax Workflow Wizard automates fax routing, approval and delivery processes to streamline business functions such as processing insurance claims, loan approvals, mortgage applications, purchase orders and more. This enhances collaboration, improves productivity, reduces errors and speeds processing times while providing an added level of security and control not available with manual or email routing and approval processes.

FEATURES AND CAPABILITIES

Build fax-enabled workflows without programming - Enable developers or knowledge workers to create, map and deploy fax workflows without scripting using a Web-based workflow wizard that provides a simple, intuitive graphical user interface (GUI), Web forms and custom actions. Custom actions include: send fax, monitor incoming fax, purge fax and monitor job status. In addition, pre-defined templates are available to guide you through the model process for insurance or mortgage loan workflows.

Leverage .NET - Take advantage of .NET and Web services within the Workflow Wizard for rapid development.

Set workflow rules and assign tasks - Use business rules to establish, prioritize and assign tasks and task lists to a person, group or role.

Send faxes - Initiate a fax to a single recipient or to a broadcast list as part of the workflow process based on information from workflow participants. Developers can hard code the desired fax information or map that information to XML data. Data can then be dynamically entered and passed to RightFax for transmission.

Receive and route faxes - Monitor RightFax accounts for new inbound faxes, route received faxes based on the DID to appropriate people or departments to initiate or facilitate a workflow.

Route faxes - Advance documents and route them through their defined workflow process for review and approvals, sending via fax. Based on their job status, faxes can be advanced through the workflow as necessary to other tasks.

Monitor status - Check fax status including tasks, subordinates' tasks and the overall workflow process through the task list within the Web-enabled GUI. Based on job status, faxes can be advanced through the workflow.

Send notifications - Send email notifications internally or externally to facilitate fax routing and approval processes.

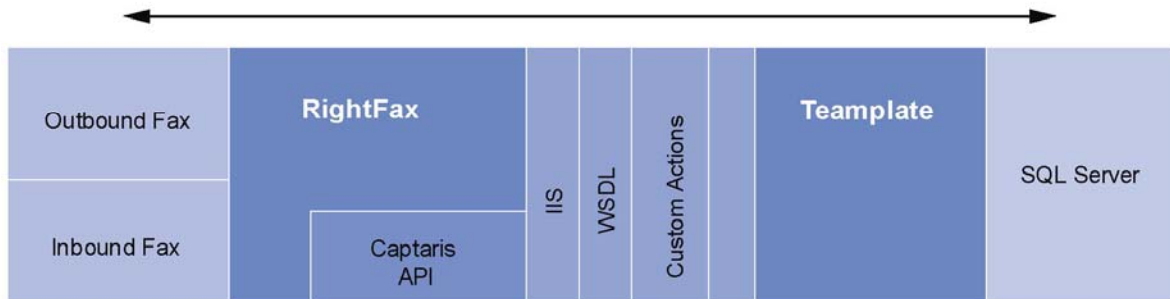
Monitor business activity - Support decision-making and manage the document lifecycle by monitoring and managing who, when and how many faxes were responded to through graphs, tables and statistics.

Purge faxes - Delete faxes from the server to free up server resources.

HOW IT WORKS

The RightFax Workflow Wizard provides the ability to create workflow for RightFax deployments. It ships with a user administration tool, a workflow server (or engine), a Web-based, wizard-driven development environment, a set of predefined actions and Web forms for building out common faxing actions for receiving and routing, approving and sending. It utilizes Web services and RightFax to enable the workflow functions and provides a fax-based integration between RightFax and Teamplate to enable the sending and receiving of faxes through RightFax to the Teamplate-powered user interface.

RightFax Workflow Wizard: Inbound and outbound faxes are managed by RightFax. Information from the fax is passed via IIS and a Web Service into the RightFax Workflow Wizard which then accesses the process model in Teamplate.



RightFax sends, receives and internally routes faxes. The RightFax Workflow Wizard uses an exposed Web service on the RightFax server to read inbound or send outbound fax information. The RightFax Workflow Wizard polls the Right Fax server and passes the inbound fax image and metadata to the Workflow engine. As the workflow process advances, the workflow information is used in the business logic to route the fax. The workflow engine stores fax images in a shared virtual folder using IIS. These faxes can be referenced by a hyperlink from within a special Web form.

COMPONENTS	SYSTEM REQUIREMENTS
Teamplate Database Setup 4.1.x.0	Microsoft Server 2000 and Server 2003. This includes clustered servers.
Teamplate Server Setup 4.1.x.0	RightFax 8.5, 8.7
Teamplate Server Client Tools 4.1.x.0	.NET Runtime (Version 1.1 of .NET Framework)
Teamplate IIS Setup 4.1.x.0	IIS 5.0 or higher and access to SQL server 2000, SP3
Teamplate RightFax Adapter Installation 4.1.x.0	
Teamplate RightFax Repository Installation 4.1.x.0	

WORKFLOW SOLUTIONS BEYOND THE RIGHTFAX INTEGRATION

The RightFax Workflow Wizard is designed exclusively to extend RightFax with workflow automation capabilities. For workflow solutions that include reporting functionality and/or integrate with other business applications, such as ERP and CRM systems, Captaris offers the complete Teamplate Workflow solutions. Teamplate is a process automation solution that improves the access and control of unique business processes for compliancy and competitive advantage. Teamplate makes it fast and easy to develop and support workflow applications within Microsoft environments, increasing collaboration, productivity and accountability.

FOR MORE INFORMATION

Captaris is a leading provider of Business Information Delivery solutions that integrate, process and automate the flow of messages, data and documents. Captaris produces a suite of proven products and services, in partnership with leading enterprise technology companies, delivered through a global distribution network. Captaris has installed over 80,000 systems in 44 countries with 93 of the Fortune 100 using the company's award-winning products and services to reduce costs and increase the performance of critical business information investments. For more information please contact us at www.captaris.com or call +1.520.320.7000.

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