ADVANTAGE TECHNOLOGIES

OpenText™ RightFax White Paper Series

Turning **Information Delivery** into a **Strategic Advantage**

Saving time and money by automating document delivery from back-office applications

Automating Document Delivery

Organizations have invested significant time and money to monitor the transactions and performance of information systems including purchasing, inventory, email, CRMs, EMRs, and managed financial systems. Companies can turn this information into a strategic advantage by quickly and cost-effectively distributing it to their customers, suppliers and trading partners. However, most enterprise applications do not address document delivery and receipt. This keeps them from realizing the significant benefits of an efficient information delivery solution.

Drawbacks of Traditional Document Delivery Methods

Delivering information via standard or overnight postal services or manual fax has substantial shortcomings. Manual processes are costly. In large organizations, the volume is huge-thousands to hundreds of thousands of documents per month. Mailing them costs $1.20 or more per document (printing, postage and labor), while automated faxing costs $0.10 per document (figures based on US dollars).

In addition, with the growing emphasis on speed, mail delivery is simply too slow.

- The postal service typically takes several days to deliver documents domestically and significantly longer for international deliveries.
- The result is longer lead times for purchasing, which may necessitate maintaining higher inventories to compensate for delays in receiving shipments.
- Delivery of invoices also takes several days, increasing Days Sales Outstanding (DSO), the number of days' worth of sales in accounts receivable (or average collection period for accounts receivable).

Furthermore, documents sent by mail are subject to loss, so payment of invoices may be delayed or orders may not be filled on time. Confirmations that purchase orders were received may also be delayed, and much time may elapse before a company realizes a critical document was not delivered.

Manual Fax Delivery

While manual fax delivery is significantly faster than postal delivery, it does not adequately handle high volumes. It is also time consuming, unsecured and error prone. For example, faxes may be sent inadvertently to the wrong recipient, or the incorrect destination number may be entered. Some companies also use general-purpose LAN fax servers. These are targeted towards managing faxes from desktops and integrating fax capabilities with email systems. They are not designed to handle critical, repetitive volumes or to integrate easily with back-office applications or host systems. As a result, a great deal of manual intervention and IT administration is still required.

Email Delivery

Email is another valuable document delivery method used by organizations today. However many businesses, industry analysts and security experts question email for critical document delivery. Email is plagued by spam, "phishing," viruses and a host of issues that present serious challenges to organizations that need to send and receive mission-critical and transactional documents. It can pose serious security concerns and expose documents to tampering. In addition, because of spamming and viruses, many people are not able to receive or are unwilling to open

email attachments. This means that important documents sent via email may not be opened, read or responded to as intended.

Addressing Business Challenges by Automating Document Delivery

Production fax and electronic document delivery and receipt solutions, which take advantage of enterprise fax, email and the Internet, are emerging as key enabling technologies for next generation document delivery strategies. They provide high-volume, low-cost, real-time, automated delivery and receipt of mission critical documents from mainframe, midrange, desktop, email, CRM, document management, ERP and other business applications.

This technology enables organizations to strategically address the challenges of:

- Providing reliable, low maintenance, document delivery capabilities without changing existing systems
- Improving workflow, transactional and business communications efficiency
- Providing timely, easy and secure access to key business information
- Reducing overhead costs associated with communicating with customers, suppliers and employees.
- Augmenting existing systems to incorporate document delivery capabilities
- Maintaining corporate compliance

By providing an alternative method of delivery and receipt, production fax and electronic document delivery and receipt solutions bridge the gap between generating information at the application level and disseminating information quickly and cost-effectively to customers, partners and suppliers.

Market Trends

Despite the attention given to the Internet and email, fax remains the cornerstone of communication between businesses. According to International Data Corporation (IDC), more than 500 billion fax pages are sent in any given year. However, companies are using fax servers for different purposes as the technology has evolved. While companies in the past primarily fax-enabled user desktops, today more and more companies are using this evolving technology to:

- Integrate document faxing capabilities with business applications, including ERP, MRP, CRM, wireless and document management systems.
- Provide an alternative way to automate application transmission requirements rather than just individual desktops.
- Improve the security and confidentiality of document transmissions
- Support compliance demands from Acts such as Sarbanes-Oxley (SOX), Health Insurance Portability and Accountability Act (HIPAA) and Gram-Leach-Bliley.

This trend and corresponding technology, originating from production fax, is rapidly changing the way companies exchange information generated from business applications. This technology provides a framework for next generation document-centric information delivery solutions that will enable extensions of fax server technology, allowing companies to integrate complete end-to-end information distribution with their core enterprise applications.

Thus, organizations making investments in fax server technology today can build a long-term document delivery solution as customer requirements evolve and grow.

Vertical Applications

Production fax and electronic document delivery provide substantial benefits, enabling industries and functional areas to increase efficiency, reduce costs, support compliance and more effectively communicate with customers and suppliers. Some of the industry applications of this technology include:

INDUSTRY	OUTCOME
Distribution	Automated document delivery helps circumvent costly, time-consuming manual faxing or emailing of bills of lading, shipping reports and other documents that must be transferred in large volumes to customers or suppliers.
Financial Services and Banking	Production fax facilities loan processing, wire transfers, rate/fee compliance, and a host of other financial processes by delivering financial documents quickly, securely and economically.
Healthcare	Tamper-resistant and automated delivery of medical information from healthcare information systems helps healthcare organizations support privacy laws and improve the timeliness of patient care while holding down costs.
Insurance	Integrated document delivery capabilities enable insurance providers to automate communications with agents and customers regarding insurance claims, procedures and policies. This improves service-levels and reduces claims processing costs.
Manufacturing	Automated delivery of transaction-based documents such as invoices and purchase orders helps organizations streamline their supply chains and more effectively manage inventory and costs

Improved Efficiency and Productivity

Many companies rely on postal services or general-purpose fax machines to deliver documents. Traditionally, these delivery methods involve labor-intensive, manual processes. In situations where companies are using postal delivery, this involves printing, bursting, folding, stuffing envelopes and mailing documents. For companies that rely on manual faxing, this involves printing documents, taking them to the fax machine, standing in line and often waiting for confirmations.

By enabling delivery of documents directly from desktops or automatically sending documents directly from the applications from which they were generated, companies can eliminate manual processes and more efficiently utilize resources.

Cost Reduction

Despite the fact more companies are becoming “digital”, printed materials can still be expensive and add to overhead costs. Automating document delivery and receipt allows companies to significantly reduce the costs associated with paper-based processes by eliminating the need to print documents such as purchase orders, invoices and statements.

When combined with the savings accrued by eliminating the labor, postal and equipment costs of manually processing and delivering documents via mail or manual fax, document delivery costs can be reduced by as much as 90 percent.

Streamline Business Processes and Improved Accuracy

Purchasing, inventory, order entry, financial and other enterprise applications generate huge volumes of business documents. Companies that automate document delivery from their business applications can streamline overall document-centric business processes and eliminate error-prone, time-consuming and repetitive manual routines.

Compliance and Secure Access

Government regulations have made safeguarding information and keeping accurate records more critical for organizations today. As a result, companies are under tremendous pressure to protect corporate informational assets from tampering while providing universal information access for employees. Traditional delivery methods (postage, manual fax and email) cannot ensure confidentiality and make information vulnerable to tampering. In addition, they are often unreliable and do not always provide guaranteed or confirmed delivery.

For companies that adopt a production fax and electronic document delivery solution, confidential material is sent in real-time directly from a business application to the intended recipient. For an added layer of protection, it also can be sent as certified email or encrypted PDF.

This limits security concerns and provides convenient, easy information access. Production fax and electronic document delivery solutions also can provide a communications backup during malicious virus attacks.

For example, should corporate email systems or intranets fail because of Internet-born viruses, organizations can keep operations up and running by sending documents automatically via fax since fax is not vulnerable to virus attacks.

End-to-end Integration with Business Applications

To efficiently manage business processes, many companies have invested large sums in systems—from mainframe and legacy systems to email, ERP, CRM and document management solutions. One way companies can extend the value of these systems is by integrating electronic document delivery capabilities with their existing enterprise applications.

This cost-effectively and efficiently handles business communications generated across the organization, allowing companies to maximize IT investments and provide better information access for transactional and decision-making purposes.

RightFax Production Fax and Electronic Document Delivery Solutions: Automating Business Communications to Improve Business Performance

RightFax production fax and electronic document delivery solutions, which include Business Integration, Enterprise Integration and the Integration Module, are designed to help companies solve the often-complex challenge of exchanging business-critical information quickly, efficiently and reliably.

RightFax provides a total approach to enterprise communications with solutions that allow organizations to electronically deliver and receive documents from virtually any application. The impact for organizations can be substantial. Efficiency gains, combined with improved response times and lower overhead costs, can lead to cost reductions of up-to-90 percent

as well as increased customer and vendor satisfaction.

Substantial Return On Investment

RightFax production fax and electronic document delivery solutions are designed to reduce overhead costs by providing flexible electronic fax and automated delivery options. Companies that employ RightFax to automate delivery of their transactional documents eliminate the costs associated with manual document delivery. The table below illustrates the cost savings companies can realize.

Proven Reliability

As an industry pioneer and innovator, Captaris now (Open Text) has been providing proven and reliable electronic fax and document delivery capabilities with RightFax since 1990. Captaris now (Open Text) was among the first to introduce production fax technology to automate document delivery, which supports business-critical applications such as invoicing, purchasing and loan processing.

RightFax is the world leader in fax server software, with a market share five times larger than its nearest North American competitor and 2.5 times larger than its nearest global competitor.

Integrations with Key Business Applications

Integration of disparate systems to extend technology investments continues to be a key priority for most organizations. RightFax production fax solutions were designed to easily augment many business systems by integrating electronic document delivery capabilities with nearly all business applications across an organization. Integration areas for RightFax production fax solutions include:

• CRM • Desktop • Document Management • Email	• ERP • Forms processing • Host • LAN • Imaging	• MFPs • Legacy • Records Management • Workflow

RightFax is a certified and recommended solution for leading software applications such as Canon, FileNet, Hewlett-Packard, IBM Lotus, Microsoft, Oracle, SAP, Sharp, Xerox and many others. This is a result of the tight integrations, partnerships and leading edge technologies available from Open Text.

Microsoft

RightFax combined with the RightFax Microsoft Exchange Module integrates with the Microsoft Exchange to provide a centralized place for users to send, receive and manage fax and email. The module uses RightFax to enable inbound and outbound faxing directly from the Microsoft Office Outlook® client and provides centralized administration and management through Microsoft Exchange/ Microsoft Outlook, as well as Active Directory synchronization with unlimited user licenses.

In addition to integrations with Microsoft Exchange, Open Text recognizes the value of Microsoft applications in many corporate IT environments. As a result, RightFax takes advantage of the Microsoft SQL database and is certified with Microsoft SQL Server 2000. In addition, RightFax maintains certification on the Windows 2003 Standard and Enterprise Servers and supports Microsoft Windows Vista and Windows XP. Additionally, RightFax supports the Microsoft Cluster environment and integrates with

Active Directory.

IBM Lotus

RightFax combined with the RightFax Lotus Notes Module integrates with IBM Lotus Notes to create a unified fax and email solution. The RightFax Lotus Notes Module uses RightFax to enable inbound and outbound faxing directly from the Lotus Notes client and provides centralized administration. Database synchronization is accomplished via a database mirroring process, which allows administrators to easily manage RightFax configurations and administration.

Oracle

RightFax has numerous ways to integrate with Oracle applications, making it easy and convenient for companies to implement, manage and use RightFax to automate document delivery from Oracle. In fact, RightFax is the only solution with built-in integrations to Oracle Purchasing 11i. These integrations allow leading electronic document delivery capabilities such as forms overlay, flexible scheduling with multiple priority levels, and advanced host notifications and management.

SAP

RightFax integrates with SAP applications using SAPconnect, SAPscript or SAP SmartForms to automatically send critical documents such as invoices, purchase orders and statements directly from SAP applications.

It provides SAP-certified, leading electronic document delivery capabilities such as unlimited forms overlay, flexible scheduling with multiple priority levels, faxing from multiple applications and host/fax status notification directly to the SAP user.

Security

Traditional delivery methods (postage, overnight services and manual fax) all open the possibility for breaches in information confidentiality since documents must be printed and can be lost, misrouted or viewed by an unintended recipient.

For companies that take advantage of RightFax production fax and electronic document delivery solutions, confidential information is sent in real-time directly from the application in a tamper-resistant format. This eliminates many security concerns associated with error-prone manual processes and supports compliance efforts.

RightFax also provides options to transmit confidential documents as certified email or as secure encrypted files. Documents digitally encrypted require passwords to access them, so they cannot be read if intercepted on the network. In addition, a certified delivery feature is available that allows users to verify the receipt of a sent document and the time it was accessed by the recipient

Intelligent Information Exchange Tools

Automated and Redundant Delivery Channels

Organizations today require business communications in many formats, including facsimile, email, print and even over the Internet. RightFax production fax solutions automate the delivery of information in various forms, depending on document types, recipient requirements and other delivery rules.

These delivery methods work in unison, originating from a single set of rules to avoid

duplication. For example, a fax document, which fails due to telephone error, can be delivered alternatively as an email, printed to a local printer for subsequent mailing or configured for all three methods simultaneously.

Flexible Data Recognition Tools

RightFax production fax solutions provide data recognition tools that enable organizations to integrate with virtually any application or device. RightFax is the only product that provides the option to use a highly flexible Facsimile Command Language (FCL) or embedded codes. This makes fax- or email-enabling of legacy, host and ERP applications fast, simple and straightforward without modifications to the application code.

Advanced Integration and Internet Technologies

RightFax production fax solutions provide tools, such as a flexible integration wizard, and take advantage of Internet standards such as Java and XML. These technologies provide powerful, flexible tools for integrating or customizing solutions specific to an organization's faxing and electronic document delivery needs and environment. They also allow more rapid implementation of electronic document delivery solutions.

High Performance Scalability

Expandable

RightFax is highly scalable to meet expanding needs. For companies that want a single, enterprise-wide solution, RightFax provides a full range of document delivery capabilities. Customers can start with one RightFax solution and add capabilities to enhance document delivery not only from mainframe applications, but also midrange, LAN and email applications. In addition, customers can start with a single server and as few as two fax channels, and then add document delivery channels as capacity requirements increase. Furthermore, the product is based on open, nonproprietary Microsoft Windows 2003 architecture, providing easy system integration, superior user interfaces, management capabilities and increased scalability.

Connectivity

RightFax production fax solutions provide several connectivity options to meet the needs of various host environments. These include Line Printer Remote (LPR) connection, 3270 connection, Transmission Control Protocol/Internet Protocol (TCP/IP) socket connection, File Transfer Protocol (FTP) connection, IBM MQ Series client 5.1 for Microsoft Windows NT and Serial.

Redundancy and Load-balancing

RightFax maximizes system performance by providing the ability to distribute essential processes for redundancy and load-balancing purposes, as well as the capacity to maximize hardware in clustered server configurations. These features enable organizations to derive the most value from their hardware investment and guarantee that no single server is overworked.

Simplicity—Easy to Use and manage

Simplified System Management

RightFax production fax solutions feature an intuitive Graphical User Interface (GUI) for system management, letting administrators

manage RightFax Servers easily—locally or remotely.

Documents can be accessed at any time through the RightFax FaxUtil user interface or RightFax Web Access module utilizing the user's Web browser.

Advanced Notification Tools

RightFax production fax solutions have comprehensive monitoring and notification features. To ensure users are confident their documents are delivered to the right destination, RightFax can send notifications to the fax originator, whether that is a host system, email address or other application.

RightFax provides numerous host notification options and notifications can be customized to include a range of information. Popular interfaces such as

- Microsoft Exchange/Outlook
- IBM Lotus Notes
- Simple Mail Transfer Protocol (SMTP)
- High-level Language Application Program Interface (HLLAPI)
- Open Database Connectivity (ODBC)

All be notified instantly upon a successful or failed document transmission.

How it Works: RightFax Produciton Fax and Electronic Document Delivery Solutions Overview

Four Phases for Automating Back-office Document Delivery with RightFax

RightFax utilizes a four-phase workflow process to automate document delivery and receipt from back-office business applications.

The process captures any form of information, renders it an electronic image, distributes the document via fax, email, certified email, secure PDF or SMS and creates customized reports, including host notifications.

Phase 1: Data Capture

RightFax captures many forms of information and data. Companies using virtually any application and platform, from desktop systems to back-office, ERP, mainframe or legacy systems, can interface with a RightFax production fax solution to automate document delivery and receipt. Recognition tools include powerful XML and Java interfaces, as well as a variety of host connectivity protocols.

Phase 1. Data Capture: Powerful RightFax tools and interfaces allow for multiple forms of input data and connections into the RightFax production fax and electronic document delivery platform.

Phase 2: Document Assembly and Preprocessing

The second phase involves processing captured data and converting it into deliverable documents. This may entail the use of lookups and synchronizations to contact databases in various formats to determine recipient information.

This phase involves the assembly of raw data into documents using templates or forms packages to create the appropriate document (purchase order, invoice, etc). Phase 2 also determines the unique rules governing how a document is delivered. This can include scheduled delivery, alternative recipients, notifications and various formatting rules.

Phase 2. Document Assembly: Using various tools such as FCL, filter, embedded codes or integrations to forms packages, data is transformed into documents based on content, transactional rules and predefined templates.

Phase 3: Document Delivery

RightFax production fax solutions offer multiple redundant and automated delivery methods. Documents can be sent as faxes and emails to print devices or routed over the Internet. In addition, secure PDF files can be sent directly or as an alternative, redundant delivery method to fax. Delivery methods take into account the need for backup delivery if a fax fails. RightFax also offers a certified delivery option whereby email delivery can be tracked and recorded via tools that provide the recipient with an inbox to manage all document communications.

Phase 3. Document Delivery: Multiple methods of document delivery, working in redundancy to ensure reliable end-to-end communications.

Phase 4: Reporting, Tracking and Monitoring

RightFax production fax solutions employ tracking and monitoring tools to report on document delivery status. Notifications can be sent to individual document senders or directly to the host application that generated the documents. RightFax management tools can be customized for all aspects of message reporting and tracking.

Delivery confirmations can be presented in many forms, depending on success or failure of the sent document(s). Custom notifications can be attached to documents, triggered accordingly and sent to a variety of host platforms or mailboxes.

Phase 4: Reporting, tracking and monitoring tools allow delivery confirmation, internal auditing for accounting purposes and real-time status of document messages.

Technologies

Open Text leverages the most proven, reliable and secure technologies to provide the most comprehensive, flexible and dependable solution available for addressing document delivery needs.

Advanced Integration and Internet Technologies

RightFax production fax and electronic document delivery products take advantage of Internet and programming standards such as Java and XML. The RightFax XML schema is similar to a Document Type Definition (DTD) and includes seven schemas, which can be incorporated or translated into an XML data structure. Schemas define such things as document submission and addressing information, unique transaction IDs, status query and status information, ID and action tags, as well as notifications.

The RightFax Java Class Library allows for fax submission from any Java based platforms or applications that are involved in managing, retrieving or creating documents requiring automated fax delivery. Java developers can simply develop code in native Java. The RightFax Java Application Program Interface (API) then converts the document into XML on the host computer before transmitting it to the Integration Module.

Once received, the RightFax XML interface will convert the XML into FCL and process and send the document. Using the RightFax API for Java, users can submit a document, query the RightFax Server for document status and perform various fax management options (forward, delete or create into a library document) on previously sent documents.

Transport Protocols for Java/XML: Java submissions that are converted to XML and native (or translated) XML documents can be transported to RightFax using various transport protocols such as Hypertext Transfer Protocol (HTTP), Hypertext Transfer Protocol over Secure Socket Layer (HTTPS), IBM WebSphere MQ or FTP. For example, transport and access list security can be provided, as well as transport encryption using HTTPS.

Connectivity Protocol Support

RightFax supports a multitude of connectivity protocols such as IBM WebSphere MQ, 3270 and 5250 emulation, File, Named Pipe, Serial, Print/LPR, HTTP/HTTPS and TCP/IP, to name just a few. This allows virtually any application or device to connect to RightFax platforms for conversion of data into automated document delivery scenarios.

FCL or Embedded Codes

RightFax production fax and electronic document delivery solutions provide the option to use highly flexible FCL or embedded codes to make it quick and easy to fax- or email-enable applications without modifications to the application code or data stream. FCL commands are usually embedded into the print application of the host. RightFax production fax offerings can read the commands to format, build and deliver documents.

FCL can also be activated using a data recognition filter, which identifies the appropriate data elements in an unchanged data stream, and then, triggers the appropriate FCL from a predesigned template.

RightFax provides more than 100 FCL commands, so organizations can customize RightFax to meet their unique requirements. This translates into the most dynamic enterprise fax and electronic document delivery system available today.

Embedded codes can be inserted within a PCL print stream or PostScript print stream. With embedded codes, algorithms are used to strip out extraneous PCL and convert PCL spacing commands to American Standard Code for Information Interchange (ASCII) spaces.

Automated Email and Secure Information Delivery

Extending the solution across the Internet is also possible with RightFax tools. Delivery methods include email, with supported document formats such as PDF, Graphics Interchange Format (GIF), TIF (group 3 or 4) and PCX. Also, secure email is an option, utilizing digital PDF encryption technology to protect emailed PDF files. Certified delivery options allow for notification of sent email documents to be provided to the sender, via a managed inbox process recipients use to retrieve and download their documents. On doing so, immediate notifications are sent back to the sender, ensuring the end-to-end communication process that is traditionally enjoyed with fax communications.

Conclusion: The Impact of Automated Document Delivery

Using a production fax and electronic document delivery solution to automate document delivery with customers, suppliers and employees is an ideal method of improving communications efficiency and security while reducing costs. It provides automated, low-cost, real-time

electronic document delivery directly from existing applications to fax and email recipients. It leverages the ubiquitous fax technology that is the cornerstone of business-to-business communication to provide universal access to important document-centric business information. Through document delivery and receipt automation, it reduces costs and eliminates time-consuming, labor-intensive, manual processes. In addition, it improves customer and supplier satisfaction by providing secure, reliable and immediate document delivery to domestic and international destinations. Combined, these have a tremendous, positive impact on organizational performance.

RightFax is the world leader in fax server software, with a market share five times larger than its nearest North American competitor and 2.5 times larger than its nearest global competitor.1 RightFax customers are found in financial services, healthcare, government, manufacturing, legal and virtually all other industries. In addition, it is installed in the Fortune 100 and many Global 2000 companies.

By incorporating a RightFax production fax and electronic document delivery solution into their document delivery strategies, companies can enjoy the advantages of automated, low-cost electronic document delivery and receipt directly from their host, legacy and enterprise applications. As a result, they can streamline business processes, speed information delivery and dramatically reduce costs. This positions companies to meet increasing demands to improve efficiency and drive better business performance.

About Advantage Technologies

Advantage Technologies has been providing on-premise and cloud-based enterprise fax and automated electronic document delivery solutions for over 20 years. Our team has completed thousands of successful system deployments worldwide in such industries as finance, insurance, banking, government, manufacturing, transportation, and healthcare.

Our North American helpdesk and sales team are certified on OpenText RightFax, Alchemy, RightFax Connect, Secure Mail, Secure MFT, Brooktrout fax boards and FoIP software, Dialogic Media Gateways, Sonus Fax Gateways, and cloud-based fax solutions. Advantage Technologies is a leading OpenText Platinum Partner and Authorized Support Partner (ASP).

Throughout our partnership with OpenText, Advantage has been recognized as RightFax Partner of the Year, IX Partner of the Year, and an IX Partner Leader.

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