Streamline

A Special Guide on Fax Servers and Electronic Document Delivery

Will Your Company Benefit from Fax Servers and Electronic Document Delivery?

OPEN TEXT

The Content Experts™

Quit wasting your time and budget doing the paper shuffle. Automate document delivery with Open Text Fax Server, RightFax Edition and you could save over a dollar per document, as much as 90 percent annually. Deliver vital business documents via fax, email or the Internet. Securely. Reliably. Efficiently.

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

You didn't get the memo?

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Will Your Company Benefit from Automating Document Delivery?

Today's economy presents enormous business challenges. Companies are under increasing pressure to increase profits and strengthen vendor- and customer-relations while cutting costs, streamlining processes and improving efficiency. Demands for speed, accuracy and reliability in communications also turn up the pressure.

To remain competitive and profitable, companies look to their Information Technology (IT) investments—systems such as email, ERP, CRM, workflow applications and MFPs—to help them address these challenges and improve overall business performance. These applications, as well as other business systems, generate huge volumes of information vital to running a high performing, profitable and customer-focused business. Efficient, secure and cost-effective distribution of this business information can have a significant impact on overall business performance by extending process efficiencies. That's where fax server software can provide a business edge. >>

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Fax server software provides enterprise fax and electronic document delivery capabilities that enable companies to dramatically improve office productivity and reduce costs by streamlining information delivery.

That means if your organization is still employing stand-alone fax machines, it is wasting time and money and is way behind current fax technology. So, too, if your employees use desktop modems to fax documents, or if you manually fax or mail batch-oriented documents generated from your back-office applications. Fax server software 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.

Fax Server Software: What It Does

Today's fax server software provides fax and electronic document delivery capabilities, to give organizations the flexibility to distribute virtually any document from any application, using a central server integrated in a company's network.

Fax servers process inbound and outbound documents and store them on the server. They also integrate with desktop, email and MFPs to enhance office productivity and reduce costs by bringing network faxing capabilities to office-workers' fingertips. Among other functions, they can track fax history, add fax billing codes, route incoming faxes to group's or individual's fax or email inboxes, provide fax cover sheets, supply fax notifications and broadcast fax. However, today's fax servers provide more than just faxing of user-generated documents from desktop and email applications.

They also integrate with ERP, CRM, host, legacy and other business applications to automate the delivery of documents such as purchase orders, invoices and statements. This process, also known as production fax, provides an unattended, electronic method to cost-effectively exchange information with customers and suppliers via fax, email or over the Internet.

Fax Server Software Benefits

Implementing a solution for enterprise fax and document delivery has countless benefits. Some of the top benefits include:

Reduced Costs Fax servers eliminate the labor, printing, postage, equipment and supply costs associated with manual faxing or mailing documents to provide significant savings. In addition, the use of a fax server generally reduces the number of phone lines in a company to make lower telephone bills the norm. Adding multiple servers allows for Least-cost Routing, which enhances cost savings even more.   >>

> "I chose RightFax for many reasons—it permits integration with other application platforms, is easy to use, lets us choose our own hardware and has outstanding administrative capabilities. Our business relies on our ability to communicate, and we rely on RightFax."
>
> —Ed Villalobos,
> applications development manager
> for Barnes & Noble

SNAP SHOT Barnes & Noble operates 500 bookstores and 508 B. Dalton bookstores in 49 states and the District of Columbia. The company offers more than 175,000 book titles from more than 27,000 publishers. Along with the comprehensive in-store selection, each store can fill customers' special orders from more than one million books in print.

The Barnes & Noble distribution center is responsible for maintaining the books offered by the Barnes & Noble and B. Dalton bookstores as well as orders placed on the barnesandnoble.com Web site. The distribution center operates from a four-building facility with more than one million square feet and more than one million books in storage, ready to stock orders. The center has an Ethernet network, Compaq servers and runs Windows NT Workstation at users' desktops.

THE CHALLENGE To maintain the massive supply of books to fulfill orders placed at Barnes & Noble and B. Dalton bookstores and on the barnesandnoble.com Web site, the distribution center must continually communicate with publishing houses. "We place orders with many different publishing houses on a daily basis," said Ed Villalobos, applications development manager for Barnes & Noble. To place these orders purchase orders must be sent to the publishing houses, and fax is the communication method of choice for this task.

"In the past, four or five employees had the sole task of faxing purchase orders to the publishing houses," said Villalobos. "Because this job was done from traditional fax machines, it was a tremendously cumbersome process that took hours and was never quite complete." Not only did the employees have to manually fax each purchase order, they had to follow up the next day and research which fax transmissions weren't completed due to wrong or busy fax numbers, human error or fax line problems. "When you manually fax about 10,000 pages each month, the time commitment is huge. We spent a lot of money on manpower and continually ran the risk of orders not being complete due to POs not getting to the publishing house."

THE SOLUTION When Villalobos joined Barnes & Noble, his first responsibility was to eliminate the tremendous amount of time and effort it took to fax out POs. "I knew that faxing problems such as tracking unsent faxes and wrong fax numbers would go away with a fax server." Because Villalobos had used Open Text Fax Server, RightFax Edition with prior employers, he began testing Fax Server at Barnes & Noble. Testing was successful, and the company chose Fax Server as the fax solution for the distribution center.

Using Fax Server, the distribution center has been able to reduce the number of employees dedicated to faxing from five to one. "Installing RightFax allowed us to place several of our employees formerly bound solely to faxing into other areas of responsibility," Villalobos said. "The cost-savings of our RightFax installation were immediately apparent."

Villalobos has also recognized and instituted other Fax Server uses at Barnes & Noble. The human resources department uses a private fax number to receive all incoming résumés. Customer service representatives continually send and receive correspondence for Barnes & Noble stores around the country regarding back orders, out-of-print books and other business. "All of this communication is done via fax. Because our customer service representatives have their own fax numbers through DID routing, the process is quick and easy." The distribution center also has plans for a charge-back process in the finance department. If Barnes & Noble has been overcharged, a fax will be automatically sent to the publisher. This will free finance employees from the time currently spent faxing charge-backs so they can return to other responsibilities.

"I worked with RightFax products for many years before coming to Barnes & Noble, and I feel that each upgrade has shown great advancements," said Villalobos. "I chose RightFax for many reasons—it permits integration with other application platforms, is easy to use, lets us choose our own hardware and has outstanding administrative capabilities. Our business relies on our ability to communicate, and we rely on RightFax."

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Improved Productivity By providing faxing capabilities from desktop and email, as well as automating document delivery from back-office applications, companies that implement fax server software can reduce time-consuming manual processes. Your employees do not have to waste time in line at a fax machine waiting to send or receive documents. Instead, they can conveniently fax documents right at their desktop or automatically from business applications.

Enhanced Security and Reliability Fax servers integrate faxing and document delivery capabilities with your business applications, eliminating the need to worry about lost or missing faxes. Users can send and receive documents directly at their desktops. In addition, large batches of documents such as invoices and purchase orders can be delivered automatically and unattended directly from back-office applications. They can also take advantage of the latest computer security features and can provide secure delivery alternatives to ensure document confidentiality.

Reduced 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 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. 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 up to 90 percent.

The numbers above are impressive if you think about the number of documents that go through your business every day. And they don't even take into account the cost of buying fax machines or modems, modem software, toner and paper, or repairs. Nor do they take into account the incalculable cost of even one vitally important fax that is lost or misplaced.

Does your organization need a fax server for electronic document delivery? Most firms with more than 25 employees sending faxes probably need fax server technology; those with more than 50 definitely do.   >>

Fax Server 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

Return on Investment
Fax Server is designed to reduce overhead costs by providing flexible fax and electronic document delivery options that eliminate the costs associated with manual document delivery and receipt processes. The table below illustrates the cost savings companies can realize.

Table 1. Cost Savings in US Dollars Using Fax Server*

Number of pages faxed	100	200	300	500	1,000
Mail cost per page	$1.20	$1.20	$1.20	$1.20	$1.20
Cost if mailed	$120.00	$240.00	$360.00	$600.00	$1,200.00
Fax Server cost per page	$0.10	$0.10	$0.10	$0.10	$0.10
Cost if delivered with Fax Server	$10.00	$20.00	$30.00	$50.00	$100.00
Monthly savings	$2,200.00	$4,400.00	$6,600.00	$11,000.00	$22,000.00

*Based on averages of intrastate and interstate phone rates at various times during the day. Mail costs include postage, printing, labor and associated supply costs.

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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 a solution before committing yourself.

Research Fax Server and Electronic Document Delivery Technology It's simple: Ask the right questions; get the right answers. As computer-based fax server technology has matured, so has the fax server software. Today it provides more than just network faxing. Now fax server software provides a base platform for 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.

Determine Your Document Delivery 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 the applications you are already using should rate high on the list. Do your employees "live" in Microsoft® Office Outlook, Microsoft Office Word, IBM Lotus Notes or other desktop applications? Do you need to integrate faxing capabilities with ERP, CRM, workflow, archival and imaging applications? You will need an application that supports the software programs your organization uses most. Do you have an MFP for copying, scanning and printing? You can add network-faxing capabilities to this solution to enhance productivity as well.

Determine Your Fax Server Software Budget
Finally, look at cost. What is the budget—both in hard costs to purchase a fax server software solution and in hidden costs such as the ability to leverage the hardware and software your company already owns? Ask how transparent the software is for users. If it is difficult to learn and use, people will revert to old-fashioned, stand-alone fax machines, and potential savings will be lost.

Fax Server Software Features To Ask About

When looking for a fax server software solution for your document delivery, there are some important features to consider.

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.

Integration with Business Applications Your fax server investment will be best leveraged if you look 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 MFPs? Does your fax server take advantage of technologies that make it easy to integrate with your business systems?

Sound Return on Investment 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 delivery needs. Can it provide convenient desktop faxing capabilities as well as automate delivery and receipt of back-office documents? Is it robust enough to handle multiple users and integrate with multiple applications? What is the Return on Investment (ROI)? Does the vendor have tools and strategies in place to help you build a long-term solution for your information delivery needs?

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

Least-cost Routing 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 Least-cost Routing (LCR), which automatically transmits faxes by the most economical path, taking advantage of off-hour telephone rates for noncritical 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.

Cost Recovery If the fax server software you are contemplating integrates with many other popular document management systems, work done by your employees is 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.

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Easy Administration Is the fax server program easy to install? To maintain? Is backup automatic? Will you have to shut down the fax server to back up or make changes or will the system run 24x7? For your own convenience, is remote management possible? What kinds of statistics can you monitor on the server? Can you receive pager alerts to help you respond quickly to any potential problems? What about disaster recovery? 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 pages.

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 tools and a plan in place to take advantage of new and expanding document delivery channels as technology evolves?

Multiple Input Connectors and Data Recognition Tools Organizations today require business communications in many formats from a variety of desktop and back-office 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 electronic document delivery needs and environment.

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.

System Security Naturally, you want to assure that your company's fax documents are safe from prying eyes—both in-house and externally. Expanded government regulations and heightened privacy and security concerns make it essential to put into place measures to safeguard business information. In this environment, security features that help ensure privacy and data integrity as well as provide a comprehensive audit trail are extremely important. As a result, you should make sure your document delivery system has robust security and management features to ensure that documents are not altered and that confidentiality is retained. You should make certain that passwords cannot 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.

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? Can notifications be customized to include a variety of information?

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 a lot more money down the line for planned or unforeseen expansion?

Database Design What is the database design for the fax server? Does it provide an open database design to simplify administration, maintenance and customization? Look for a solution that provides an open database that can cost-effectively meet your performance, storage and interoperability needs.

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.

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.

About Open Text

Open Text is a leader in Enterprise Content Management (ECM). With two decades of experience helping organizations overcome the challenges associated with managing and gaining the true value of their business content, Open Text stands unmatched in the market.

Together with our customers and partners, we are truly The Content Experts,™ supporting 46,000 organizations and millions of users in 114 countries around the globe. We know how organizations work. We have a keen understanding of how content flows throughout an enterprise, and of the business challenges that organizations face today.

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