

Enterprise Fax Integration Solutions for Microsoft® Exchange

Streamline Business Communications by Leveraging the Combined Technologies of Fax and Email

BENEFITS OF FAX AND EMAIL INTEGRATION

While many businesses have invested significantly in corporate email infrastructure to link their companies and employees to the rest of the world, fax continues to play a key role in providing secure and reliable document exchange. Emerging technologies today offer unparalleled opportunities to integrate fax and email, even voicemail—to streamline business processes and reduce costs.

Choosing the right technology to enable streamlined communication is critical for both system administrators and users. Building on the foundation of email messaging—technology with which most employees are familiar—speeds up implementation and acceptance, as well as reduces the need for training and end-user support. This one interface can connect everyone in the organization regardless of workstation type or location.

Integrating fax and email provides a number of substantial benefits, all designed to meet the demands for immediate, cost-effective and global business communications solutions.

For IT administrators, the benefits of fax and email include:

- Leveraging existing IT network infrastructure
- Single point administration at the fax server or email server, including remote access to administrative tools
- Reduce document transmission costs
- Lower system maintenance and support costs by eliminating recurring costs such as toner, paper, repairs and training
- Improve cost control and accountability
- Rollout/deployment gains

For network users:

- Easy to use, centralized universal inbox in which to manage communications
- The ability to send, receive and track the status of faxes through the familiar environment of an email box, such as Outlook
- Improved productivity and efficiency
- Document confidentiality and enhanced security
- Global, remote access to critical business documents whether on the LAN, WAN or the internet
- Reliability of document delivery with confirmation/customizable notifications
- The convenience of attaching documents in their native formats, such as those in Microsoft Office Word, Microsoft Office Excel, Microsoft Office PowerPoint (including xlsx, .docx, pptx, jpeg, gif and html)
- Mixed addressing (fax and email recipients) in the same message

THE RIGHTFAX DISTINCTION

RightFax is the proven market leader in fax server and document delivery software with market share of more than five times greater than the closest North American competitor and 2.5 times greater than our closest International competitor. It delivers the most reliable and robust fax software solutions to integrate and automate the flow of a full range of fax, paper and electronic documents and data, enabling enterprises to achieve significant cost reductions. By using a RightFax Server, companies can securely and efficiently deliver business information from virtually any application via fax, email, print devices or over the Internet. RightFax is also the leader in enabling network fax solutions for MFPs.

Some of the RightFax advantages over less robust fax servers are in its gateway architecture. RightFax easily integrates with an organization's technology and information system infrastructure. What's more, RightFax is built on the premise of server independence to serve as a document delivery engine. RightFax does not rely on the operation of a mail system to enable the sending and receiving of faxes. Even if the mail system is down, faxes can still be received and transmitted with RightFax.

Other fax servers that boast complete integration with mail servers actually rely on these mission-critical business systems for fax transmission processing. In such cases, any downtime on the email server means that fax service is also interrupted. In some instances, a company's entire messaging system can be brought to a standstill, cutting off vital business communications. In addition, mail-dependent fax servers cannot connect to other business applications without integrating through the mail system. Most mail systems do not provide advanced fax functionality through features such as Least-Cost Routing, ERP integration, or workflow processing, so this integration may be difficult, if not impossible to accomplish.

Scalability and extensibility are also key differentiators to the RightFax solution. Whether for a small business or a multinational enterprise, no other fax server solution offers the breadth and depth of product to meet your specific document delivery needs.

Windows Certification

RightFax is certified on Windows 2003 Standard and Enterprise Servers. Certification provides application reliability, continuity in the user interface experience, and ease of installation and ongoing operation. Applications that are certified on Windows 2003 have gone through a rigorous third party testing process to ensure conformance with Microsoft application requirement specifications. Reliability and decreased cost of ownership make certified applications a preferred choice.

Conformance with Microsoft guidelines ensures the smooth operation of the RightFax Server and reduces any risk of downtime that may be experienced with uncertified products. Certification on Windows 2003 Standard and Enterprise Servers takes this a step further by providing assurance that the RightFax Server works in a Microsoft environment. Captaris partners with industry-leading technology companies to provide customers with some of the most advanced document process automation products on the market today. These certifications show our level of commitment to reliability and providing enterprise-class solutions. As a Microsoft Global ISV Partner, Captaris is one of an elite group that provides world-class Microsoft solutions. Captaris has demonstrated a proven success in developing software for Microsoft platforms. The company's strategic partnerships are an integral part of the product offering and also include Canon, IBM FileNet, Hewlett-Packard, IBM Lotus, Oracle, SAP, Sharp and Xerox among many others.

THE RIGHTFAX INTEGRATION WITH EXCHANGE

RightFax offers the most sophisticated network fax and email integration for Exchange, providing a comprehensive feature set that allows users to perform virtually every fax function from the familiar interface of their existing Outlook desktop. With the introduction of a RightFax Microsoft Exchange Module to your enterprise, users who wish to consolidate their messages through Outlook can send and receive faxes and notification messages from their existing desktop clients. Since the RightFax Microsoft Exchange Module installs at the server and uses email client software, there is no need to install additional software on each desktop and no need for additional training.

Comprehensive Feature Set

- **Inbound Fax Routing** Automatically routes faxes directly to inboxes. Faxes are received as dcx, pcx, tif (Group 3 and 4), or gif attachments, according to predetermined specifications.
- **Optical Character Recognition (OCR) Attachments** Received faxes can be automatically converted to editable text files with the optional RightFax OCR Converter module. The editable text files are then attached to inbound email messages with the original fax images.
- **Outbound Faxing** Users can send documents and messages to the fax server as easily as constructing an email message.
- **Phonebooks/Fax Contact List Integration** No need to maintain separate address books; simply select an address from existing email address books and RightFax automatically resolves the appropriate fax address information such as a home or business fax number.
- **Notification and Real-time Status Information** Users can choose to be alerted to a variety of notification messages about sent and received faxes in their Outlook Inbox. Organizations can also route undeliverable messages to defined accounts based on their business processes.
- **Attachments/Native Document Rendering** Email messages containing a variety of file attachments are automatically converted to fax format at the server. RightFax also preserves Rich-text Formatting (RTF) message bodies created in email forms or messages, so users know their faxes will look right every time.
- **Scheduling Options** Users can choose the time of day or day of the week they want to send faxes, to ensure optimal transmission times or to take advantage of off-peak rates.
- **Least-cost Routing Options** Sophisticated RightFax dialing rules ensure that a fax is sent successfully by the best method, using many different levels of dial-string matching, including fax number pattern, priority, time and day restrictions, initiating user/group and server availability. The system is so flexible that administrators can construct rules to send the fax correctly every time, regardless of the format in which the user enters the fax number.
- **Reporting/Billing Analysis** RightFax can track two billing codes and one unique document ID per fax, and validate the codes for accuracy before sending. In addition, a wide selection of built-in models can be used to generate usage and billing reports with the RightFax Reporter.
- **Hold for Preview** Faxes created in Outlook can be converted by the fax server and then returned to Outlook for viewing and approval before transmission.
- **User Account Synchronization** Administrators can automatically synchronize user accounts in Exchange or Active Directory with RightFax user accounts.
- **Unified Administration via Email** Mail and fax user properties can all be maintained within the mail system.
- **Auto-Enrollment** Users do not need a RightFax account to be able to send faxes. RightFax modules can be configured to let any email message with the correct fax format be sent via RightFax.
- **Easy-to-use Interface** Because users are familiar with their email systems, no additional training or ramp up time is required. They can begin faxing minutes after installation.
- **No Installation or Quiet Installation** RightFax offers several options to meet administrators' installation requirements. Whether they wish to install desktop software themselves, automatically "push" it from the server or install no software at all, RightFax has an option for everyone.
- **Multiple RightFax Servers can be supported by a single Exchange Server** A single Exchange Server can support multiple RightFax Servers with multiple connections that allow for separation of the document traffic.
- **Components of the RightFax Microsoft Exchange Module** The RightFax Microsoft Exchange Module consists of four components that work together to allow inbound and outbound faxing via email, user database synchronization and unified administration.

- **RightFax Gateway** This component is responsible for converting email messages to fax format and delivering them to the RightFax Server for processing. The gateway also directs incoming faxes to the RightFax connector for processing by Exchange.
- **RightFax connector for Exchange 2007** This service, which is installed and runs on the Exchange Server, handles all messaging between the Exchange 2007 Server and RightFax Server.
- **RightFax connector for Exchange 2000 or 2003** This service, which is installed and runs on the Exchange Server, handles all messaging between the Exchange 2000 or 2003 Server and RightFax Server. The RightFax Connector can be configured through the Microsoft Management Console (MMC) for Windows 2000 and 2003 and through Microsoft Exchange Administrator with Exchange 2000 and 2003.
- **The Outlook Fax Extension** This component allows users to easily generate and send new faxes to one or more contact addresses in the Outlook Contacts folder. The optional Outlook Fax Extension must be installed separately to be available to Outlook clients.
- **RightFax Form for Outlook** The RightFax Form for Outlook allows clients to create and send faxes from an integrated fax form installed into Outlook. The RightFax Form for Outlook also allows clients to receive new faxes into a form that includes a built-in fax viewer. The RightFax Form for Outlook can be installed on each client workstation separately.

RIGHTFAX CONNECTOR FOR EXCHANGE 2007 AND ACTIVE DIRECTORY

Microsoft Active Directory schema is not extended for this connector for the RightFax Connector for Exchange 2007. Instead, all database synchronization between RightFax and Exchange (Active Directory) is managed through the Captaris Sync Module. This module is an XML/XSLT based tool that allows RightFax administrators to create and synchronize users from Active Directory (domains, groups, and organizational units) and LDAP compliant data sources.

RIGHTFAX CONNECTOR FOR EXCHANGE 2000 OR 2003 AND ACTIVE DIRECTORY

Microsoft Active Directory is a centralized network directory service based on the ISO X.500 protocol. The hierarchical structure of Active Directory stores an organization's directory information in useful containers, such as countries or organizational units. Directory information consists of objects (ranging from people to computers) and their attributes. The attributes for characterizing an object vary depending on the type of object. For example, a user object has attributes such as name, telephone number and address. The default attributes for an object are defined by its schema. A forest, which is a collection of Active Directories (or trees) in one organization, consists of a single schema. Active Directory replicates the directory information across all the domain controllers throughout the forest.

RightFax can be enabled to synchronize to Active Directory. This synchronization is one-directional only, meaning that RightFax properties are updated by Active Directory. The interval for the updates is customizable. The RightFax Active Directory Wizard walks administrators through the configuration. When synchronization is enabled, RightFax extends the Active Directory schema with the following three object classes.

[Figure 1. Object Classes Added by RightFax to the Active Directory Schema.]

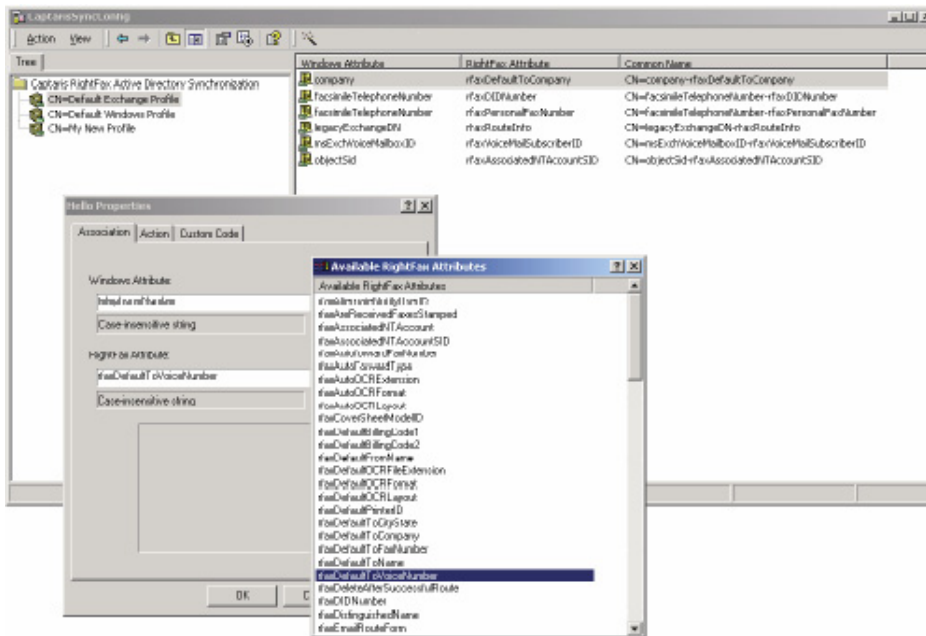
Class	Definition	Attributes	Definition
CaptarisSyncObject	Individually mapped user attributes	<ul style="list-style-type: none"> CaptarisSync CustomAction Captaris Sync FilterAction captarisSync RightFaxAttribute captarisSync WindowsAttribute 	<ul style="list-style-type: none"> Custom VBScript to execute during synchronization VBScript used for filtering The RightFax user attribute The corresponding Active Directory User Attribute
captarisSync SchemaObject	RightFax user attributes	<ul style="list-style-type: none"> captarisSync FieldType captarisSync VBSField 	<ul style="list-style-type: none"> Field type (string, Boolean, etc.) VBScript map to individual RightFax user attribute
capatarisSync ProfileContainer	Container for captarisSyncObjects	<ul style="list-style-type: none"> captarisSync ProfileModifiable CaptarisSync ProfileParent 	<ul style="list-style-type: none"> Flag indicating whether or not the container is modifiable Attributes (if any) inherited from parent class

The Active Directory synchronization is performed by one or more RightFax Workserver modules. The service account used by each Workserver module that performs Active Directory synchronization must be able to read from Active Directory.

Customizing with Microsoft Management Console (MMC)

Administrators can customize the synchronization by changing the mappings for these property associations directly from the MMC. The administrator can then manage all user accounts from Active Directory and modifications to any user in Active Directory automatically update the corresponding user in RightFax.

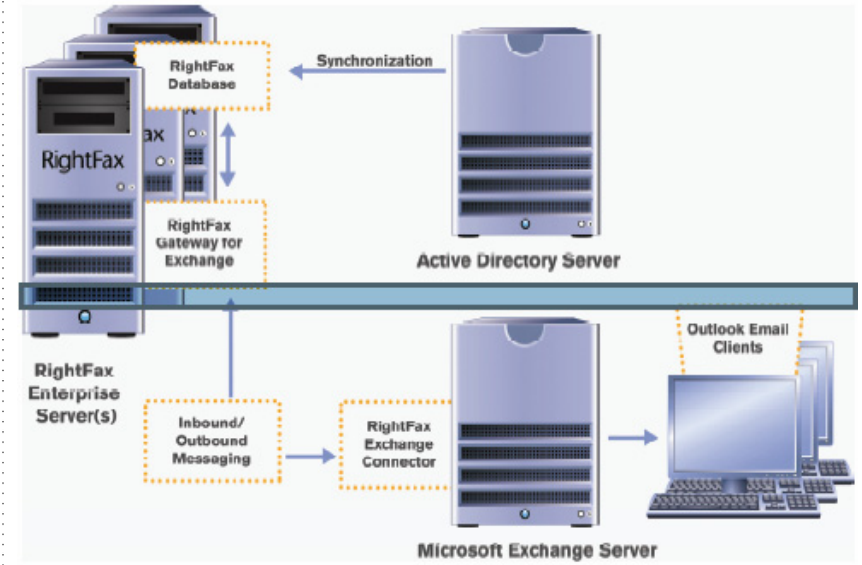
[Figure 2. Mapping of Active Directory fields to RightFax fields is made easy with the RightFax Snap-in for MMC.]



Administrators can specify which Active Directory accounts should be synchronized, the interval between synchronization and other conditions. In addition, a default user account can be designated as the template on which all new users will be based. By

choosing from the available containers, administrators can also configure RightFax to synchronize users across their Active Directory domain.

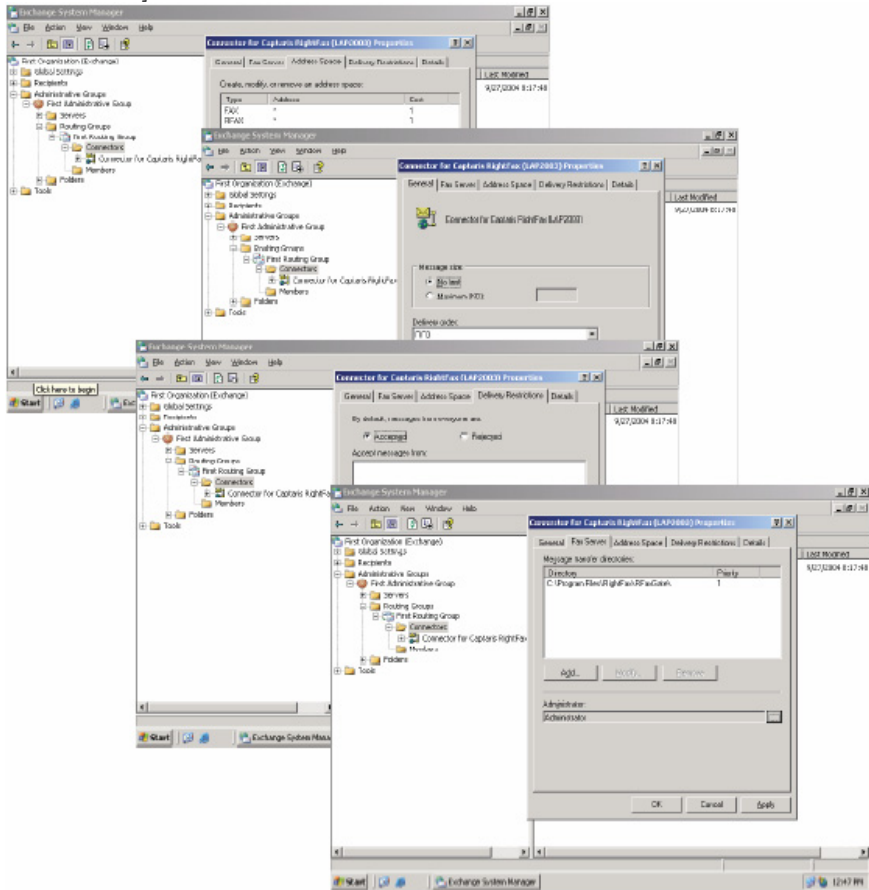
[Figure 3. Configuration of the RightFax Microsoft Exchange Module allows synchronization of user account information between the fax server and the mail server or Active Directory and can scale across multiple RightFax Servers.]



ADMINISTERING RIGHTFAX

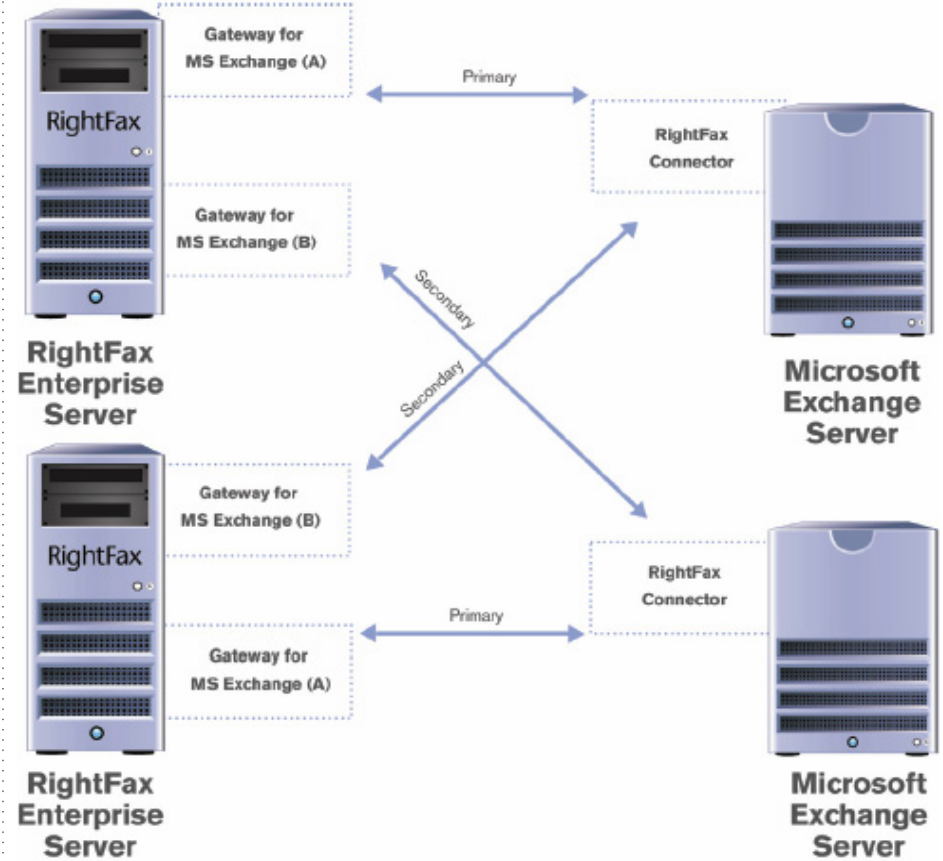
The key to creating a universal inbox is allowing users and administrators to perform all necessary fax and other messaging functions from a single interface. RightFax gives fax functionality right from Outlook, while also providing administrators the flexibility to manage fax users from Exchange or Active Directory. RightFax includes a snap-in for MMC for centralized administration.

[Figure 4. The RightFax Snap-in for MMC provides for centralized system administration.]



can be assigned a priority setting to permit load-balancing and redundancy among servers.

[Figure 5. Multiple RightFax Gateways optimize load-balancing among servers and provide redundancy for fax operations. (Each Gateway is licensed separately)]



Redundancy and Load-balancing

While only one RightFax Connector is installed on each Exchange Server, this connector can communicate with multiple RightFax Gateways across a company's network. In addition, each Connector/ Gateway directory connection

Using Outlook Fax Forms

RightFax administrators can install the RightFax Form for Outlook form on client desktops to expand and simplify the process of sending and receiving faxes via Outlook. The RightFax Form for Outlook must be installed and configured on each client workstation, although "quiet" installation and SMS options are available.

Web Delivery

Depending on the needs of your corporation and use of fax technology, fax images can become large. As a result, some administrators prefer that their email servers not store all their corporate faxes. Web Delivery sends user notifications through email of received faxes, but rather than attaching the actual fax image to the email, the RightFax Server attaches a hyperlink to the fax. The user simply clicks on this link and their browser takes them straight to the fax image, which remains on the RightFax Server. This frees up the email server and saves disk space for email traffic. The RightFax Web Access Module is required for this feature.

INTUITIVE USER INTERFACE

RightFax provides a comprehensive feature set that allows users to perform virtually every fax function from the familiar Outlook mail interface. Since the gateway is installed on the Exchange Server, there is no need to install additional software on each desktop and no need for additional training.

Sending Faxes from Outlook

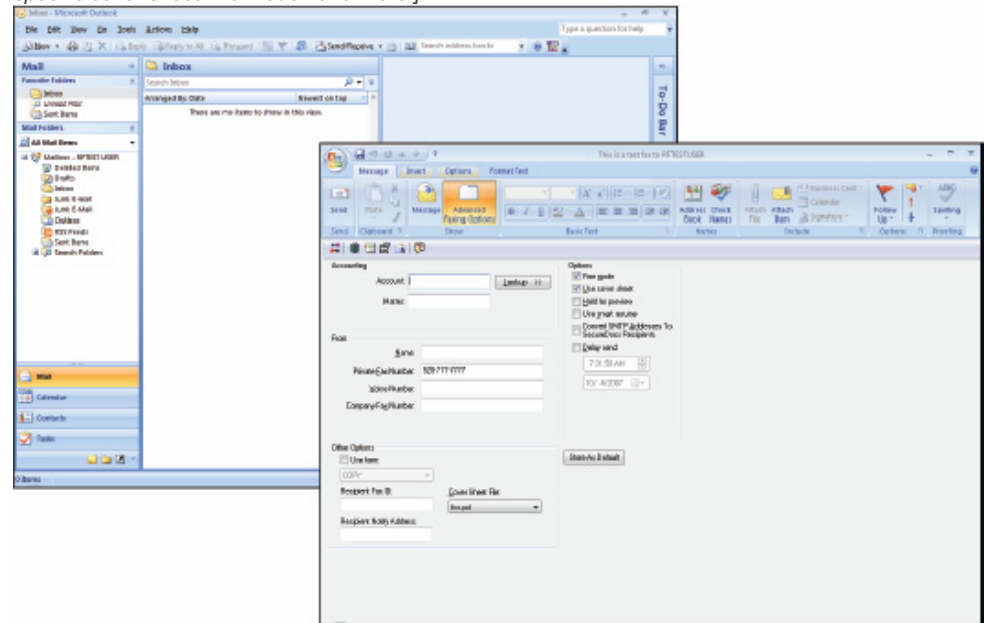
Sending a fax message is as easy as sending an email. When users send email messages, they tell the mail system where to send them by specifying an address. Most email addresses include a user ID, the user's post office and other downstream information. RightFax follows the same principle, except that instead of sending a message directly to another user, it sends the message through the RightFax Gateway.

The RightFax Microsoft Exchange Module is tightly integrated with the mail system. Messages sent through the module are transported to the RightFax fax server, which converts them into faxes and transmits them over the phone lines, intranet or Internet.

Users can store frequently faxed names and fax numbers in their Outlook Address Lists in the appropriate RightFax address format, rather than manually entering fax destination information every time. The RightFax extension allows users to easily generate and send new faxes to names in their Outlook Contacts list. When the Outlook fax extension is installed, Outlook automatically scans selected contacts for fax numbers and other addressing information to automatically resolve the appropriate fax

address format for the module. The fax number is taken from the Contacts' Business Fax field. If the Business Fax field is empty, the Home Fax field is used. When available, a contact's company, city/state, billing information and voice numbers are included in the fax address for display on the fax cover sheet.

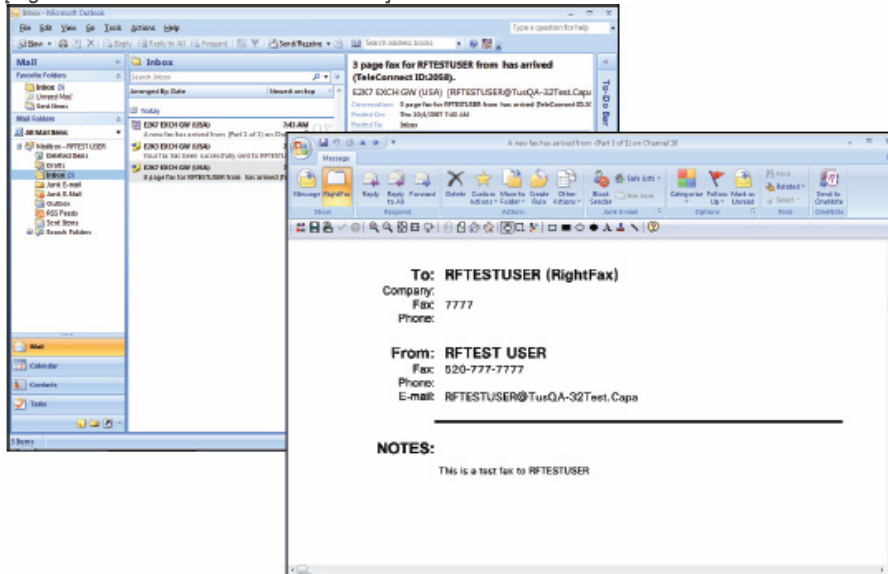
[Figure 6. RightFax Form for Outlook lets users include billing code information, library documents, specific cover sheet information and more.]



Receiving Faxes in Outlook

Routing received faxes into email accounts is the same process as sending faxes, only in reverse. When a fax arrives on a phone line, the fax board receives it and RightFax determines to whom the fax belongs based on various predetermined routing options. Once the fax arrives into a RightFax account, RightFax checks to see if the fax should be routed to an email account, if the proper user email address is specified. The fax can be automatically deleted from the user's RightFax account or remain for future reference.

[Figure 7. Fax view in the Outlook Inbox.]

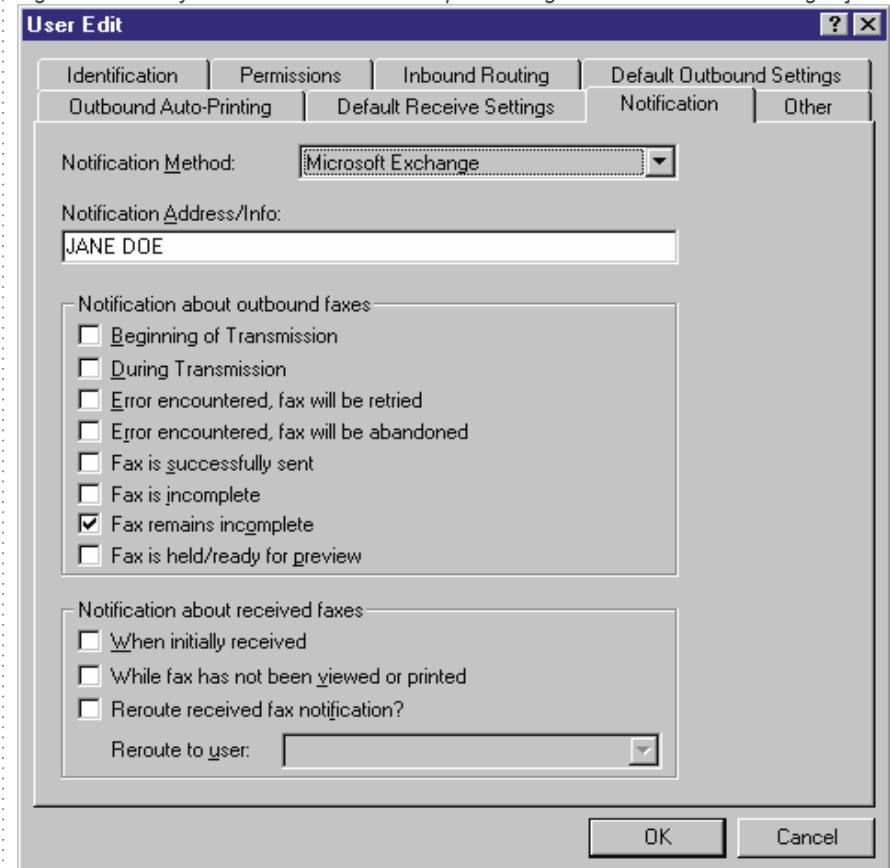


Faxes arrive in the Outlook Inbox with the sender's CSID in the subject line (if available). The message may read, "A new fax has arrived from 520-555-1212." By double-clicking on the message, users can view the fax's email body and corresponding history information. The fax arrives as a gif or tif (Group 3 or 4) attachment.

Notification and Message Tracking

RightFax can generate custom, automated notifications about sent and received faxes. For example, a user can specify that all incoming faxes go to his/her RightFax mailbox but have the notification message "A new fax has arrived from XYZ" appear in their email mailbox.

[Figure 8. A variety of conditions set in User Options will generate notification messages.]



In addition, organizations can route undeliverable messages to defined account based on their business processes. This improves fax management, tracking and audit trail capabilities.

The RightFax Connector can also track each RightFax message (inbound faxes, outbound faxes and notifications) in the Exchange Message Tracking Log, if enabled. This allows administrators to determine if a particular fax is still being processed within the Exchange system or if it has been transferred to RightFax.

THE RIGHTFAX ENTERPRISE SOLUTION

RightFax is at the forefront of today's document delivery market. Captaris is the leading provider of integrated and scalable fax server and electronic document delivery solutions to meet the varying document delivery needs of any organization. Captaris continues to deliver innovative technology that drives the industry forward.

RightFax, the proven world market leader in fax server and electronic document delivery solutions, integrates with Exchange and other business applications to provide easy-to-use, easy-to-manage document delivery capabilities. The RightFax Microsoft Exchange Module provides advanced desktop faxing features, creating a unified fax and email solution from the familiar Exchange/Outlook environment. What's more, RightFax provides a total approach to enterprise communications with a complete range of network, production and Internet fax delivery options that integrate with desktop, email, CRM, ERP, document management and other business applications.

For companies that want a single, enterprise-wide fax solution, RightFax modules provide a full range of document delivery capabilities. Customers can start with one RightFax Server and add modules to fax-enable not only email applications, but with ERP, CRM systems and legacy mainframe applications as well. This modular approach leverages a company's investment in its fax server technology and simplifies installation and ongoing administration with a range of on-premise and outsourced delivery options, RightFax is uniquely positioned as the single source for all fax and electronic document delivery needs.

By incorporating RightFax into their document delivery strategies, companies can enjoy the advantages of high-volume, low-cost document delivery across their enterprise. As a result, they can streamline business processes, increase productivity and speed information delivery while dramatically reducing costs.

About Advantage Technologies

For over 14 years Advantage Technologies, Inc. has been considered one of the leading providers and integrators of Automated Document delivery solutions, including business process automation, document management and fax server solutions in the U.S. For more information, please call 866-730-1700 or email sales@ATechnologies.com. You can also visit us at <http://www.ATechnologies.com>

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Open Text, an enterprise software company and leader in enterprise content management, helps organizations manage and gain the true value of their business content. Open Text brings two decades of expertise supporting 50 million users in 114 countries. Working with our customers and partners, we bring together leading Content Experts to help organizations capture and preserve corporate memory, increase brand equity, automate processes, mitigate risk, manage compliance and improve competitiveness.

