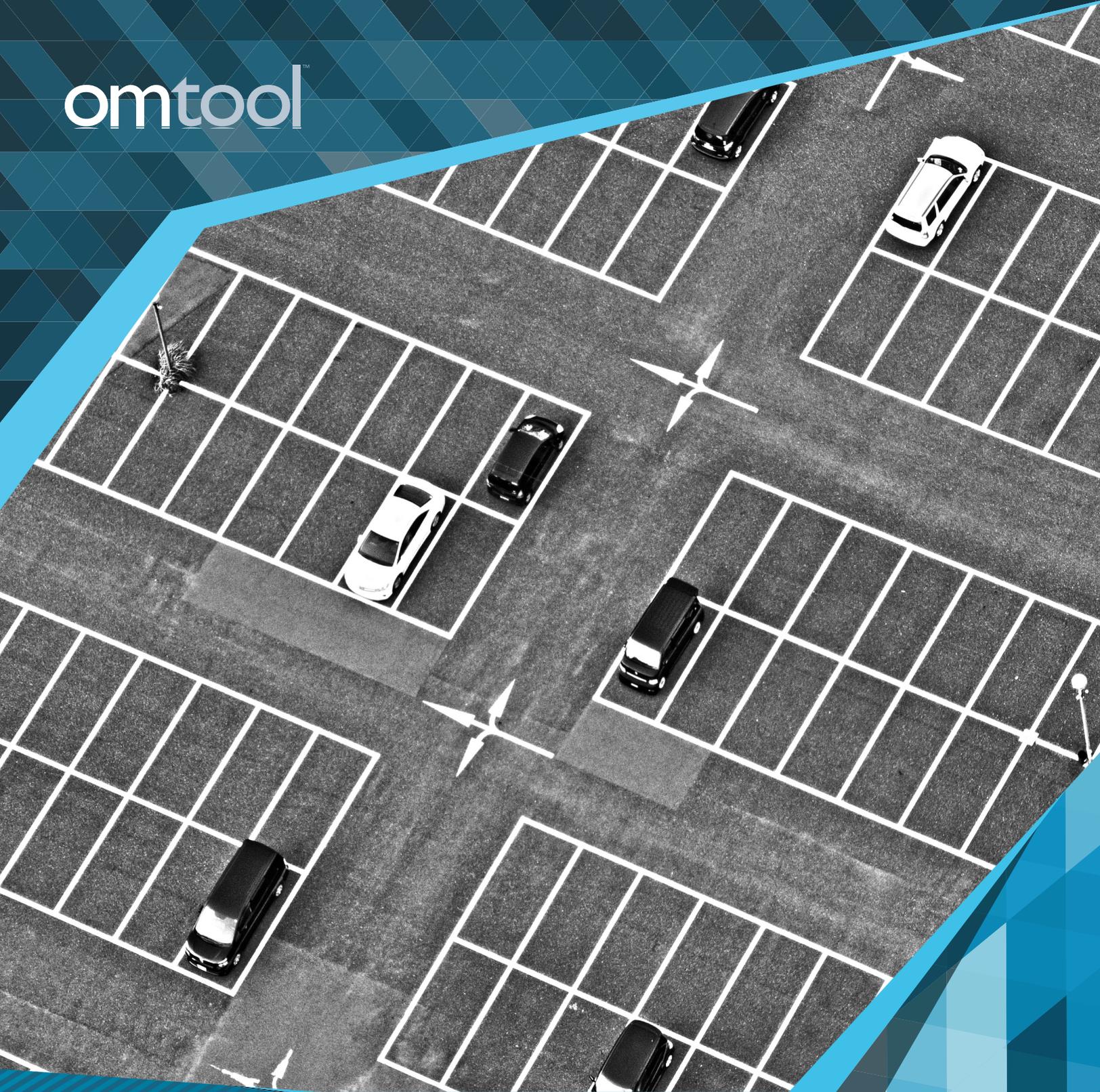


omtool™



# Consolidated Fax

*Solutions Brief*

# Enterprise Solution: Consolidated Fax Communications

## Creating a Centralized Fax Infrastructure to Reduce Costs and Meet Regulatory Requirements

Even today – decades after widespread corporate adoption of facsimile technology – traditional fax machines and hardware-based fax systems still dominate corporate environments. From dedicated phone lines and fax-modem cards to consumables like paper and toner, faxing presents significant costs to companies of all sizes. But greater concerns arise from outdated fax architectures that also present indirect costs, manageability issues, inefficiencies, and compliance risks that are no longer acceptable in today's highly regulated corporate environment. Whether it's SEC 17(a), Gramm-Leach-Bliley, Sarbanes-Oxley, or HIPPA, countless industries are under heavy regulatory pressure to secure employee communications with complete tracking, storage, accessibility, and auditability. For far too long, fax has been a cost and compliance vulnerability in corporate communications.

### A Closer Look at Fax Service Providers

Many organizations rely on fax service providers to organize, manage, and distribute inbound and outbound faxes – this comes at a price. With multiple fax service providers and different types of faxes (external inbound, internal inbound, internal outbound), organizations are often burdened with inefficient processes and high costs. Likewise, outdated analog phone lines are costly to support (as much as \$20 per line per month), reaching up to six figures annually for large organizations. Today, forward-thinking companies aim to:

- ➔ Eliminate the management and support of traditional fax machines
- ➔ Maintain transparency and provide an audit trail for all regulated paper and electronic communications
- ➔ Leverage networked MFPs to streamline faxing and scanning
- ➔ Improve user productivity
- ➔ Shrink the corporate eco-footprint

### The Challenge

Every day, companies rely on fax infrastructures to send, receive, and handle important documents that drive critical internal and external workflows. Unfortunately, this often translates into costly, repetitive, time-intensive, and tedious processes. For many companies, especially financial institutions, there is also a crucial need to meet current and emerging industry and government requirements to track, audit, and access content. Simply put, cost and compliance issues are causing companies of all sizes to rethink their fax-based communications.

### The Solution

Network-connected MFPs have the ability to harness current technologies and consolidate the fax infrastructure to deliver a solution that meets cost-cutting and compliant communication demands while leveraging the investment already made in today's MFP fleet. With the right document process automation and archiving solutions companies can simplify the fax experience while reducing costs, improving accessibility, strengthening compliance and security, and enhancing productivity.

# Today's Fax Infrastructure – Areas to Address

## Leverage Workspace, Networked MFPs

Organizations have embraced networked MFPs that can copy, scan, and distribute documents. Even so, many companies still rely on stand-alone fax machines or traditional, hardware-based fax solutions – an inefficient and costly choice, especially if the organization relies on faxing as a method for internal communication. By not leveraging its internal networked MFPs, organizations incur needless costs and inefficiencies. Users waste time and the valuable benefits of sophisticated MFPs are lost, such as the ability to audit and capture documents for regulatory compliance. In situations where each fax incurs a cost from the fax provider to the company, it quickly becomes a very costly method of communication.

## Streamlining User Infrastructure

Today, many companies are still scanning individual documents into a fax machine. Then, they manually enter fax numbers or e-mail addresses, which takes time and poses a risk for error. By not streamlining the process, productivity remains low and sending multiple documents is cumbersome and time consuming.

## Regulatory Compliance

Many companies lack a method for identifying “regulated” employees who fax documents. This can be problematic especially for financial institutions operating under strict compliance frameworks. Global 100 and public companies need identification methods and processes to track and record all regulated employee actions and document transactions. These records often must be stored in a secure archive and still be quickly accessible. Organizations can face millions of dollars in fines if they fail to comply.

## Fax Processing Automation

Stand-alone fax machines are simply a document transmission vehicle. They do not provide any means of identifying who the person is sending a fax, the contents of the fax, or the ability to store the faxed communication. Further, they require documents to be processed one at a time. By integrating networked MFPs within fax communication processes, companies can streamline their copy, scan, fax, and distribution processes while lowering costs and increasing efficiency. This is of particular importance especially for companies concerned with regulatory compliance where employee authentication and document capture solutions enable communications from regulated employees to be tracked and logged automatically. Additionally, storing these documents in an onsite secure archive provides full transparency and immediate accessibility.

As a recognized industry leader in document capture, Omttool delivers solutions to help companies of all sizes manage their paper processes cost-effectively and efficiently.



# Consolidated Fax Communications

## AccuRoute® for Consolidated Fax Communications

As a recognized industry leader in document capture, Omttool delivers solutions to help companies of all sizes manage their paper processes cost-effectively and efficiently. With Omttool's AccuRoute document process automation platform with integrated fax, companies can consolidate their fax infrastructure to reduce fax-related costs and achieve regulatory compliance. This fax communications solution delivers:

- ➔ **Employee identification at the MFP** allowing users to see user-defined distribution lists and fax documents with the touch of a single-button
- ➔ **Scan and fax multiple documents efficiently** using barcoded Intelligent Routing Sheets containing the user's routing instructions
- ➔ For a document that exists in electronic format (such as a PDF or Word document), users can simply **create an e-mail message and address it to a fax number** rather than an e-mail address
- ➔ **Automatically store text-searchable, electronic copies** of all fax documents for compliance and easy retrieval
- ➔ All incoming **faxes can be received on the AccuRoute Server and forwarded** via e-mail to the appropriate e-mail address on a corporate Microsoft Exchange Server

The AccuRoute® capture and processing software uniquely delivers flexible, distributed document capture with a highly scalable infrastructure, extensive capabilities, configuration flexibility, and the ease of use necessary to implement simple or complex solutions, involving hundreds or millions of documents per month, out-of-the box.

From fax costs to meeting compliance, the process of fax communications is now easier, faster, more secure, cost-effective, and efficient with the adoption of Omttool AccuRoute.

# AccuRoute® — The Distributed Document Process Automation Platform

## Creating a Centralized Fax Infrastructure to Reduce Costs and Meet Regulatory Requirements

AccuRoute is Omtool's enterprise-class document process automation platform for the deployment of solutions to capture, process, deliver, and archive critical business documents. The AccuRoute capture and processing software uniquely delivers flexible, distributed document capture with a highly scalable infrastructure, extensive capabilities, configuration flexibility, and the ease of use necessary to implement simple or complex solutions, involving hundreds or millions of documents per month, out-of-the box.

At the heart of AccuRoute is the ability to capture, process, and distribute documents that originate in paper (and often electronic format). Paper documents are "captured" (scanned) from any networked scanner, scan-enabled digital printer, copier, fax, or MFP and prepared for processing by the AccuRoute Server. The AccuRoute Server converts documents to a variety of formats, collects and provides document-related metadata, validates information, compresses the documents, and then delivers the documents to the destinations required.

During the conversion process, documents may be OCR'd and/or converted to any variety of formats including PDF, text-searchable PDF, DOC, JPG, RTF, TIFF, TXT, XLS, among many others).

Many document processes require the capture of related information that is passed along to the destination with the document image. The metadata collection can be implemented with AccuRoute through a number of options including:

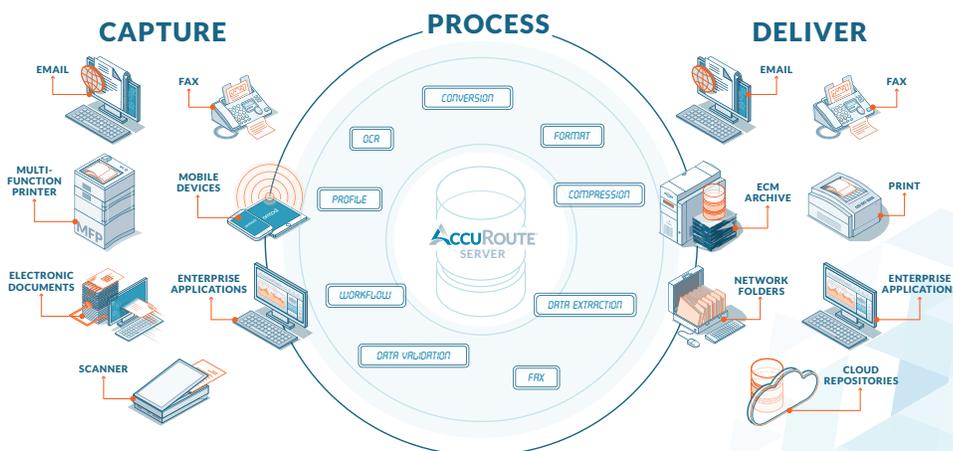
- ➔ Profiling documents using native document management system profile screens
- ➔ Extracting data from documents
- ➔ Printing/Scanning with prompts to capture new information at the MFP panel when scanning
- ➔ Validating collected data against predefined

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# AccuRoute® —

## The Distributed Document Process Automation Platform

### AccuRoute® for Consolidated Fax Communications

When the processing is complete, AccuRoute will deliver the document image and its related information to the destination(s) desired. While the image need only be captured once, AccuRoute enables multiple processing tasks and delivery to any number of destinations simultaneously, using a single scan. The delivery to destinations include:

- ➔ **Scan-to-Self**—email, network folder, or web folder
- ➔ **Scan-to-Distribute**—email, fax, printer, and/or distribution list
- ➔ **Scan-to-Store**—enterprise content management (ECM) including document management, records management, and traditional enterprise content management systems, repository, archive, network folder
- ➔ **Scan-to-Line-of-Business** Application

Throughout the document lifecycle, AccuRoute automates the document processes and provides the enterprise-class delivery with the ability to scale from single department or small business use to large, multi-location corporate deployments. In the case of faxing, leverage MFPs to capture and transmit internal or external faxes quickly and efficiently while accommodating government regulations.

### Achieve Compliance and Consolidate Your Fax Infrastructure with AccuRoute Solutions

#### AccuRoute Web Client—Defining Fax Numbers and Destinations

Whether at the office or working remotely, users can create distribution lists, define fax phone numbers, and assign destinations from the desktop. This “viewer” provides constant and immediate access to current numbers and destinations if needed for future reference.

#### ObjectArchive™—Maintaining Fax Communications

This high-performance file system stores the documents, forms, images, and other data that have been captured electronically. With ObjectArchive, you have immediate access to the documents, and records you need, where and when they are required.

## Achieve Compliance & Consolidate Your Fax Infrastructure with AccuRoute Solutions

# The Benefits of Implementing Omtool AccuRoute for Fax Communications

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## One-Touch Button Faxing for Outbound Faxes

Once the user authenticates at the MFP, they can scan any document in multiple formats and send it anywhere. User authentication eliminates the hassles of punching in phone numbers and email addresses manually in addition to identifying the originator of documents.

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## Archive Information for a Complete Audit Trail

With AccuRoute, you know who was the originator of communications, the content of those documents as well as the date and time they were submitted. Avoid regulatory fines and meet government regulations. Ensure faster document retrieval and easier manageability using AccuRoute with Omtool ObjectArchive.

## Batch Files Together Using Intelligent Routing Sheets for Easy Scanto- Fax

Define fax numbers and destinations right from the desktop using the easy-touse AccuRoute Web Client. Or, save time and eliminate redundancy by batching large volumes of documents and scanning several Intelligent Routing Sheets simultaneously.

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## Least Cost Routing for Faster, Easier Internal Faxing

AccuRoute will send internal-bound faxes directly to the destination MFP without the assistance of a fax service provider or associated charges.

Today, Omtool AccuRoute provides document capture and consolidated fax communications to hundreds of companies worldwide.

## *The Leader in Financial Document Process Automation*

For more than 20 years, Omttool has helped some the world's largest corporations and leading financial services providers cost-effectively manage their document-intensive process-automation challenges. Continually refining its technology innovations, Omttool offers a platform with an architecture that incorporates our extensive experience in high-volume document processing to address "all the paper."

Today, AccuRoute provides the infrastructure for automating document processes in hundreds of firms worldwide. Our solutions are now the standard for organizations looking for enterprise-wide automation of their paper-centric processes. With our extensive experience automating processes involving millions of documents per month, multi-function device vendors, software and service providers, and financial services firms trust Omttool to handle all their paper-document process automation needs.

## A Trusted Partner in Enterprise Fax Solutions

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