

SUMMARY

The Fax Import Integration for Captaris RightFax works behind the scenes; systematically capturing, classifying, and storing electronic copies of business faxes sent or received through a RightFax Server. The imaged fax documents are indexed based on the fax metadata, utilizing a set of configurable rules. Captured fax documents are immediately archived into the OnBase repository making them widely available to authorized personnel across the enterprise.

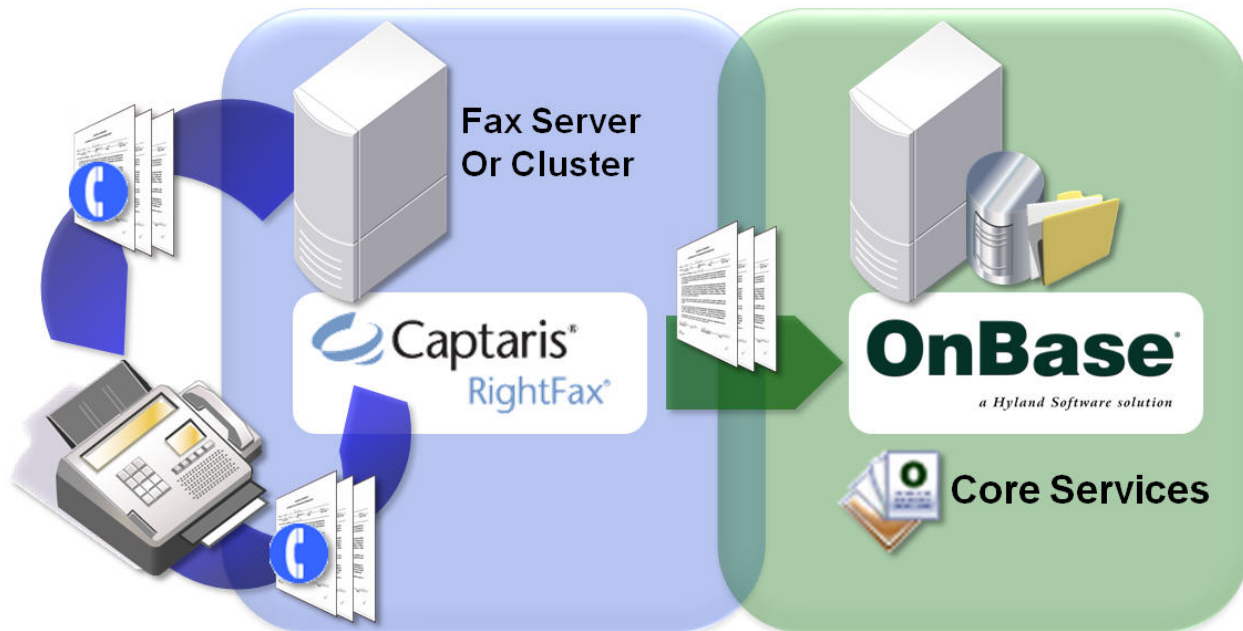
KEY BENEFITS

- **Prevents the time-consuming paper chase** by archiving faxes electronically.
- **Reduces business cycles** by making faxes available immediately throughout the enterprise.
- **Minimizes compliance risks** by automatically maintaining copies of inbound and outbound faxes.
- **Safeguards private or sensitive information** by eliminating the need for paper documents.
- **Automatically receives, stores and classifies faxes** without manual intervention.

BUSINESS APPLICATIONS

- **Owners of Captaris RightFax** can leverage their software investment by further automating their business processes built around faxed documents. The integration automatically indexes and archives documents directly into an OnBase system, making the faxed documents immediately available to all authorized employees.
- **Business process owners** will find that faxed documents archived into OnBase are immediately available, not only for access, but for automating business processes through tools such as Workflow. Fax metadata including sending fax number and received fax number can be used to automatically route the documents to specific business users that need to verify the faxed documents for completeness before processing continues.

DESIGN



Incoming and outgoing faxes on the RightFax Server or Cluster are evaluated for archive into OnBase. Fax documents are automatically classified and indexed in OnBase based on configuration rules and mapping of fax metadata.

The RightFax Integration and OnBase Core Services of the same version must be installed on the integration workstation or server.

KEY FEATURES

- **Automatically archives faxes** directly from a RightFax Server to an OnBase system.
- **Rules based configuration** classifies faxes to a specific document type.
- **Metadata mapping** provides automatic keyword indexing for imported faxes.
- **Faxes can optionally be sent to a scan queue** for further evaluation or processing.
- **Ad hoc import** is available from the RightFax FaxUtil, via-drag-and drop to an OnBase folder.

INTERFACE

Fax Connector Configuration – metadata mapping

The screenshot shows the 'Fax Connector Configuration' window with a menu bar (File, Service, Configuration, Rule, Help) and a tree view on the left. The main area is divided into sections: 'Rule Condition' with a dropdown for 'When the' (set to 'To Fax Number') and a dropdown for 'Is a phone number equal to' (set to '18005555000'); 'Archival Settings' with a dropdown for 'Choose the default document type:' (set to 'AP - Vendor Invoices'), a checked checkbox for 'Add document to the following scan queue:' (set to 'QA Process'), and an unchecked checkbox for 'Archive Fax History into document type:'. The 'Keyword Mappings' section contains a table:

Type	Property	Keyword Type
Fax Property	From Name	Vendor Name
Static Value	RECEIVED	Status

Optional OnBase ad hoc import folder in RightFax FaxUtil

The screenshot shows the 'RightFax FaxUtil' interface with a menu bar (File, Fax, List, Tools, Help) and a toolbar. The main area displays 'OnBase - All Faxes' for user 'Dev-rightfax: ADMINISTRATOR [5370]'. The left pane shows a tree view with folders for 'Srv-rightfax [ONBASE\rgerwig]' (Main, Trash, All) and 'Dev-rightfax [administrator]' (Main, Trash, All, OnBase, Other Users). The right pane shows a list of faxes with columns for 'Date/Time' and a search icon. The list includes:

- 1/8/2004 10:58 AM
- 1/8/2004 9:57 AM
- 12/5/2003 6:33 PM
- 12/2/2003 5:29 PM
- 12/2/2003 11:28 AM
- 12/2/2003 11:27 AM
- 10/14/2003 10:17 AM (highlighted)

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