



# **Fax Software and Fax Services**

Making the Best Choice



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# Introduction

Fax communication presents a challenge for organizations seeking to improve business process efficiency. As fax has remained a medium of choice for business information transfer, the latest fax technology gives organizations choices to replace stand-alone fax machines or enhance faxing capabilities:

- **On-premise fax server**
- **On-demand fax service**
- **A combination of the two**

And no matter what fax solution you choose, management of fax documents continues to play a crucial role in meeting standards established by mandates like the Sarbanes-Oxley Act (SOX) and the Health Insurance Portability and Accountability Act (HIPAA).

This paper is intended to help organizations gain the highest level of process efficiency and support for regulatory compliance from faxing solutions available today.

# Inefficiency of Manual Faxing

## Fax machines cost money

Even today, in a world dominated by email and other Internet-based systems, organizations of all sizes in every industry still maintain fax machines for at least some communications. Like any fax technology, fax machines offer the fundamental benefit of secure transmission of sensitive material to satisfy requirements such as SOX and HIPAA.

But manual faxing has considerable expenses and limitations. The deficiencies of fax machines require allocation of valuable resources to fax communication.

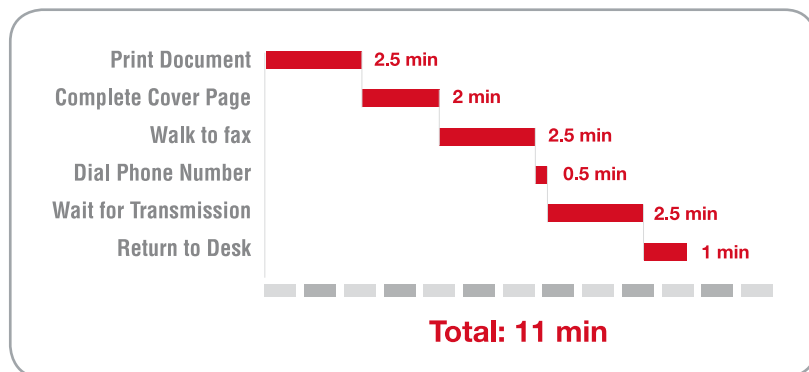
### For organizations that still rely on manual faxing, the cost of doing business includes:

- Purchase and maintenance of fax machines
- Photocopiers to support fax operations
- Telephone charges for multiple fax lines
- Material and supplies including toner, fax drums and paper
- Labor and productivity
- Late or lost faxes (and lost business)
- Manual retrieval, distribution, sorting and filing of fax documents (inbound and outbound)

Manual fax also causes the administrative headaches of managing multiple fax machines and fax traffic. Communication issues may arise from poor document quality and transmission failures. And because confidential or sensitive information may be exposed, sitting out in the open on the fax machine, document security requires close attention.

## Manual faxing takes time

### Time spent on a 2-page fax run



Enterprises are recognizing that conventional faxing methods involve:

- Inefficient manual tasks
- Significant expense
- Heavy infrastructure
- Limited flexibility to handle volume and peak usage periods

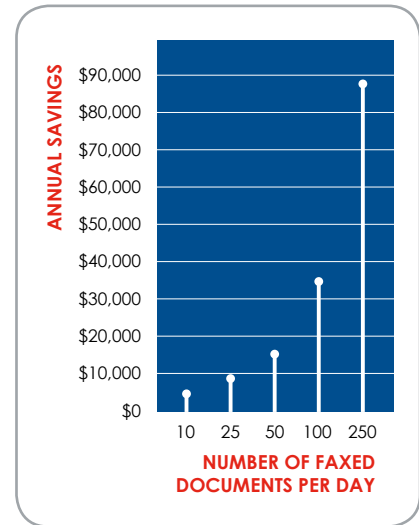
# Fax Automation Efficiency

Automation solutions have displaced fax machines, desktop fax modems, and manual fax handling in many organizations — especially where paper-intensive processes or high-volume document delivery is involved. With varying degrees of functionality, these solutions help organizations:

- Enable end-users to send and receive faxes from the desktop
- Integrate fax with business applications and messaging platforms
- Automate faxing on a production scale
- Improve fax traffic management and administrative control

Automating fax offers cost-reduction advantages by enabling an organization to reduce its use of paper and number of inbound telephone lines. Fax servers, for example, proved the capability to receive, store and route incoming faxes electronically, and send faxes automatically from enterprise applications or from desktop email/messaging clients.

When fax automation lives up to the potential of the available technologies, organizations benefit from having fewer manual processes, a more consolidated IT infrastructure, streamlined information flow into and out of the organization and better business communication. Organizations sending as few as 25 faxes per day can see significant return on investment in as little as three months with a highly capable fax automation solution.



Deciding what fax solution to invest in doesn't only fall in the hands of top-level executives. For system administrators, choosing the right technology to integrate with existing applications while enabling seamless communications can be a formidable task. And, finding a fax solution that fits your organization's unique environment and specific document delivery requirements is crucial. Selecting a fax automation solution that fits with your current infrastructure, doesn't require custom programming, and is easy to use should be high on the company wish list.

## Key outcomes of fax automation

### Cost reduction

In addition to eliminating as much as 90% of manual fax expenses, fax automation offers the potential to improve telecommunications cost efficiency, financial reporting and overall profitability.

### Productivity

Fax automation helps organizations optimize use of human and material resources, with minimal resources allocated to fax communication and more resources available to support core business activities. Fax automation can also help organizations achieve unified messaging goals and improve communication efficiency throughout the enterprise.

### Business process efficiency

Automating fax communication can help businesses reduce Days Sales Outstanding (DSO) and improve cash flow, streamlining key business processes (such as purchasing, sales administration, invoicing and cash collection) and shortening the cycle time of communicating with customers, suppliers and other trading partners.

### IT simplification

Organizations leverage value from existing systems through consolidation of fax infrastructure and distribution of fax loads for highest availability, manageability, scalability, integration and flexibility to support changing requirements.

# Fax Automation and Compliance

Regulatory compliance requires some basic elements where business documents are concerned: structure, repeatable processes, security, auditability, and archiving. Fax servers and fax services offer features that bring improved organization and greater control of documents to support compliance initiatives. With their workflow, access control, version control, and search and retrieval features, fax automation systems support the controls that companies seek to establish in their efforts to satisfy regulatory requirements.

In undertaking compliance initiatives, it's important for companies to maintain focus on core business goals: efficiency, customer service, and profitability. Companies can align compliance support with these objectives and benefit from:

- Streamlined business processes
- High productivity
- Low operational costs
- Effective risk management

While compliance expertise typically resides in legal and auditing disciplines and in the business units themselves, IT professionals can play a critical role in shaping how compliance efforts manifest themselves in the infrastructure. In fact, regulatory compliance can be the key driver for business process improvement through automation.

## Compliance challenges associated with faxing

Having fax machines "out on the floor," using traditional scanning and printing technologies for input and output, presents challenges that directly affect an organization's ability to support regulatory compliance.

- **Security:** Given their usage patterns and costs, many companies deploy their fax machines as shared devices in public places. Unfortunately, that cuts directly against many regulatory compliance requirements that mandate strict controls on the privacy of patient or customer information. You need to restrict access to the sensitive data that typically pours in over the fax machine — salaries, tax information, revenue forecasts, personnel matters and more. When that confidential information arrives by fax, you don't want it reviewed by random bystanders. For this reason alone, traditional fax machines are unsuited to many processes governed by regulatory requirements.
- **Process control:** Without a dedicated user or log-on, walk-up fax machines and fax procedures are inherently unstructured. Faxes arrive and depart without careful logging or routing. Not surprisingly, many get lost before they reach their intended recipient. Paper trays empty out. Ink and toner cartridges run out. Machines jam. Output quality can fluctuate. It all adds up to too many opportunities for document-dependent business processes to slip from their defined steps because of the shortcomings of conventional fax appliances.
- **Auditability:** Most compliance frameworks — and SOX in particular — require outside parties to audit processes, documents, and results to make determinations about the controls that are in place. For example, SOX requires you to track virtually any document (in any media) that is a record of a transaction, either in part or in whole, that affects the income statement. That could encompass virtually everything from sales quotes to purchase orders to invoices. Traditional faxing is an inherently unauditible process. Businesses need a recorded and transparent trail of document flows, routing, reviews, and approvals.
- **Archiving:** Retention requirements vary based on the governing legislation, but companies need the ability to efficiently store and quickly produce selected documents on demand for auditing and legal discovery processes. Faxes are often the documents that fall through the cracks, subjecting companies to fines and sanctions.

Traditional appliance-based, publicly accessible fax transmissions and receipts evade the systematic controls required for compliance. In taking on the task of systematizing processes to meet compliance requirements (and improve efficiency and customer service as well), organizations need fax solutions to support those efforts.

As enterprises and IT professionals contemplate the right strategies to improve compliance while streamlining their business processes, many are giving fax automation careful scrutiny as a potential solution to these challenges. Fax automation supports centralized faxing for network-connected nodes. Users can add cover pages, specify transmission instructions, integrate contact information from address books, send faxes from enterprise applications, and automatically email incoming faxes to named recipients.

## Supporting compliance with automating faxing

The advantages of fax automation are numerous, of course, because a central system manages the flow of faxed information in electronic format rather than paper. That immediately enables IT departments to structure how that information is accepted, routed, audited and archived. The capabilities and benefits of this approach include:

- **Integration with other IT systems:** Integrating fax communications with business systems speeds up processing, reduces the risk of human errors and lowers operating costs associated with manual fax processes.
- **Electronic capture and storage:** Faxes are captured as electronic images, such as a PDF or TIFF file. The result: easier (and lower-cost) storage, access and the ability to share securely.
- **Inbound fax routing:** Compliance requirements make secure inbound fax routing essential for many companies. Using Direct Inward Dialing (DID), a fax server can intercept an inbound call, capture the fax, and route the electronic image to a specific email inbox. This ensures the fax is delivered directly to the intended recipient and eliminates the risk that sensitive documents will be intercepted by the wrong individual at the fax machine. This privacy/security is a critical component of how fax servers improve regulatory compliance.
- **Document management integration:** With their built-in check-in, check-out, storage and retrieval of electronic documents, document management systems complement fax solutions to automate the process of archiving faxes as they are sent or received. This helps the enterprise conform to relevant rules for archiving and retention.
- **Searchable indexes:** Some fax solutions incorporate or integrate with technology that enables indexing of incoming fax documents to create a searchable PDF document for later retrieval. This capability can significantly mitigate legal discovery or auditing costs by eliminating the manual sifting through thousands or millions of documents. Instead, users can search on a key phrase and quickly retrieve a results set of relevant documents.
- **Workflow integration:** Fax automation systems can integrate with business process management or workflow applications that extend automated processing of faxed documents. For example, a company could specify a process under which a faxed document must first be forwarded to a supervisor for review prior to transmission.
- **Security:** Automation enables users to send faxes from their own computers, rather than printing, walking over to a public fax machine, perhaps waiting in line and possibly leaving sensitive information in plain view and unintentionally exposing confidential information. It's a similar story for inbound faxes as well — electronic routing ensures only intended recipients see the documents.
- **Improved auditing:** A fax solution integrated with a comprehensive document management system enables enterprises to create and store a complete, auditable log of all inbound and outbound transmissions, including length/pages, time, and destination/source, as well as any indexed searchable content. This helps ensure transparency of process controls.

# On-Premise Fax Servers

Organizations can choose from many commercially available software applications to gain the automation capabilities provided by fax server technology. Any fax server must provide reliable format conversion, telecommunications and network connectivity, and client/viewing functions as appropriate for your computing environment. While all fax servers offer these essential functions in some form, the methods and depth of functionality vary greatly. Along with specific selection criteria, there are several basic requirements to consider.

## Essential functions

Desktop fax users need familiar interfaces and intuitive capabilities that minimize the need for training and troubleshooting. Fax server administrators need ease of installation and management — convenience and control with real-time status, central management of fax servers anywhere in the network and historical reporting. Standard administrative tools and techniques are generally preferable to proprietary interfaces.

High-volume production faxing requires seamless integration with enterprise software systems (whether packaged commercial solutions or custom-developed applications), support for multiple operating systems and protocols, scalability and fault tolerance for around-the-clock operations.

When choosing a fax server vendor, look for an established company with a solid reputation for innovation and service — and customer references to back it up. Expert technical support and professional services should be readily available to help you achieve maximum benefit from your fax server implementation.

## Beyond the basics

The best of fax server technology converges in solutions that satisfy the fax requirements of the entire enterprise with comprehensive functionality, reliable operation, ease of use and a solid yet flexible architecture. Such a solution is easy to deploy and simple to administer, receives any fax and sends any document, offers maximum leverage of your existing information systems, finds the most cost-efficient delivery paths for faxes, lets you choose the capabilities you need and grows with your organization.

## Esker Fax Server Solutions

Fax server solutions from Esker are designed to meet and exceed all of these criteria. Organizations using less-capable fax servers may miss out on substantial benefits resulting from a well-designed architecture incorporating a full range of interworking fax functions. Esker fax servers support many sources of documents, provide reliable operation at high volumes, integrate with messaging solutions and applications, allow cost-optimized deployment and provide a convenient way to manage and account for the operation of the system. Organizations also gain a solid foundation for end-to-end document process automation that extends beyond fax and email to encompass data capture from any inbound document source and outbound delivery in any document format via any transport media.

## Application and infrastructure integration

**Email and messaging systems** — Esker fax server solutions make faxing as easy as sending email. Users can send and receive faxes directly from a familiar email interface, such as Microsoft® Exchange/Outlook®, Lotus Notes® or Novell GroupWise®, and have a “unified inbox” for all fax and email communication. This integration employs the standard techniques and structure of the messaging platform environment.

**Business systems** — Implementing Enterprise Resource Planning (ERP), Customer Relationship Management (CRM) and other business systems helps companies address part of the document management challenge. Every day, users fax business-critical documents generated by these systems, such as invoices, purchase orders, shipping documents, reports, statements, contracts, legal documents, sales quotes, order confirmations, collection letters and more.

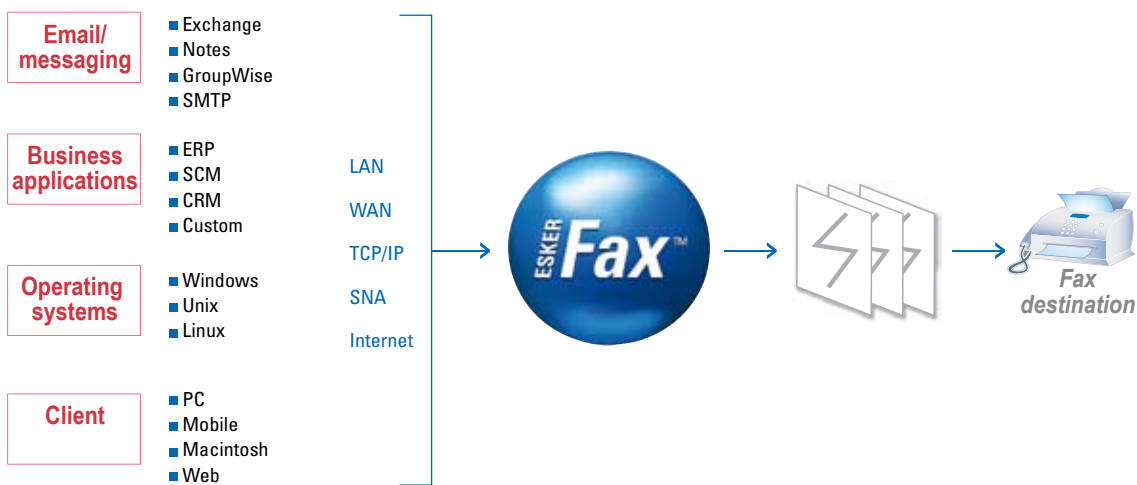
But the automation these systems provide does not extend to document delivery. As companies seek competitive advantages, they are identifying huge potential for process improvement in the area of document flow.

In addition to enabling desktop faxing from common desktop applications like spreadsheets, word processing, and presentations, Esker fax server solutions offer the ability to fax directly from ERP, CRM and similar enterprise systems, including custom-developed solutions. Organizations can use Esker fax servers to automate business processes that rely on delivery of documents, such as billing and procurement. Esker fax servers connect with enterprise solutions such as those from SAP®, Oracle®, Siebel™, PeopleSoft®, JD Edwards®, Baan®, and others — without requiring custom programming changes to the applications.

**SAP solutions** — Customers of the inter-enterprise software company SAP have already taken a major step toward enterprise-wide automation and consolidation of business information. But when it comes to delivering that information (in the form of invoices, purchase orders, reports, and other documents) outside the organization, many companies rely on manual fax or point-to-point fax solutions. Esker fax servers integrate seamlessly into SAP application environments. Administrators can use SAP Output Determination to configure the fax server as the default output device, making it easy for organizations to fax-enable any SAP solution module. With Esker fax servers, users easily send faxes through their standard SAP desktop interfaces — no training required. Status notifications are returned directly to the SAP system, so they are accessible to users via the same interface. Esker fax servers support SAP communication and connection architectures, enabling faxing directly from SAP solutions without requiring costly programming changes.

**Platforms and protocols** — Today's enterprise computing environments typically consist of a diverse mix of platforms and protocols from which fax servers can derive significant business value. Esker fax servers support multiple operating systems, including the latest versions of server and messaging platforms such as Microsoft Windows Server and Microsoft Exchange or Lotus Domino and Notes, as well as open source platforms such as Linux and Unix. And a fax server that supports legacy systems makes vital business information readily available, leveraging the power of these systems. On the client side, Esker fax servers take into account the need to support both local and remote/mobile users via PCs, laptops, or web. Esker fax servers support proprietary software applications for high-volume print generation, such as IBM® Advanced Function Presentation (AFP). Esker fax servers also provide a rich, well-documented Application Programming Interface (API) offering multiple integration methods such as Java, C++, COM, and Visual Basic.

**Connectivity** — A fax server should offer the breadth of connectivity that any enterprise may require, allowing integration without special protocols, proprietary software or custom programming. This includes TCP/IP support to fax-enable Unix/Linux systems and IP-based applications via FTP, LPR/LPD, and SMTP; and SNA support to fax-enable IBM mainframe and AS/400® (iSeries®) computing systems, including 3270, RJE, and APPC protocols.



## User productivity

**Fax client** — With Esker fax servers, intuitive interfaces guide users through fax operations like sending, receiving, status checking, and fax management. Client features such as fax preview, name/address books, automated cover pages, document templates, phone number filtering to help eliminate spam and control outbound faxing, mail merge from applications such as Microsoft Word, and notification boost user productivity and minimize the need for training.

**Web interface** — A browser-based web client enables fax sending, receiving, viewing, and management from virtually anywhere in the world. Organizations also have the ability to customize the web interface.

**Basic workflow** — To help streamline business processes, Esker fax servers provide a simple workflow interface enabling users to validate, review, correct, approve, or reject inbound and outbound documents or data prior to delivery. Customizable user forms should be available to specify the information to be validated.

**Advanced inbound routing** — Beyond the ability to send an incoming fax to a destination, Esker fax servers can make routing decisions based on sophisticated criteria such as a combination of the dialed number and the day of the week, time of day, size of the file, date or other attributes of the fax. This ensures secure delivery and helps prevent delays in information exchange due to lost or misrouted faxes.

**Image quality** — Esker fax servers offer a precise means of rendering and faxing documents. With capabilities like native file conversion for application printing and electronic merging of plain-text print files (from a mainframe, for example) with electronic forms, Esker fax servers enhance fax document images.

**Data and document formats** — In addition to supporting a full range of data and document formats, including files from applications like Microsoft Office, as well as TIFF, PCL, PostScript, PDF, and RTF, Esker fax servers offer recognition of inbound fax or image documents, including the ability to reformat TIFF to PDF for delivery via email attachment.

## Administration

**Central management** — Esker fax servers provide highly integrated, centralized administration of all networked fax servers, centralizing management of fax servers and other applications. With a single management entry through a familiar Microsoft Management Console (MMC) interface, administrators are able to manage Esker fax servers through enterprise databases and from any network-connected computer.

**Scheduling and batching** — Queue management capabilities prioritize and schedule fax jobs for sending at specified times, taking advantage of slow traffic periods and lower rates. In addition, call batching capabilities can help reduce telephony costs by combining and managing faxes directed to a common phone number into a single call.

**Least cost routing** — Esker fax servers optimize efficiency in geographically dispersed and multi-server enterprises. Least cost routing directs outgoing fax traffic to the servers in the locations that will incur the lowest cost, for maximum volume at minimum telephony charges during peak periods of high fax traffic.

**Security** — Esker fax servers take advantage of industry-standard security mechanisms to protect against unauthorized access to incoming fax documents, administrative functions and the telecommunications facilities of the server.

**Accounting and reporting** — With Esker fax servers, administrators can take advantage of flexible reporting capabilities to measure activity and allocate costs with accounting codes. Esker fax servers also provide database support for the use of other preferred tools for customized reporting, rather than relying on a proprietary database.

**Records** — User of Esker fax servers can easily access an audit trail through a central archive of faxed documents.

**Notification** — Esker fax servers make it easy to monitor and correct transmission failures (such as a busy fax number, an out-of-paper condition, or a voice answer) with email notification of failed transmissions and job status.

## Scalability and performance

**Load balancing, clustering, and monitoring** — Accommodating multi-server environments with a wide range of fax traffic and volumes, Esker fax servers support load balancing, clustering and remote monitoring. Load balancing and clustering coordinate the operation of multiple and/or geographically dispersed fax servers, improving efficiency and document delivery speed by distributing workloads among servers. A distributed, clustered environment also provides failover capabilities, redirecting resources and redistributing fax workload as needed in the event of a server failure. And to maximize uptime for uninterrupted delivery of critical business documents, Esker fax servers also provide network management protocol (SNMP) and print management support along with comprehensive logging of fax events.

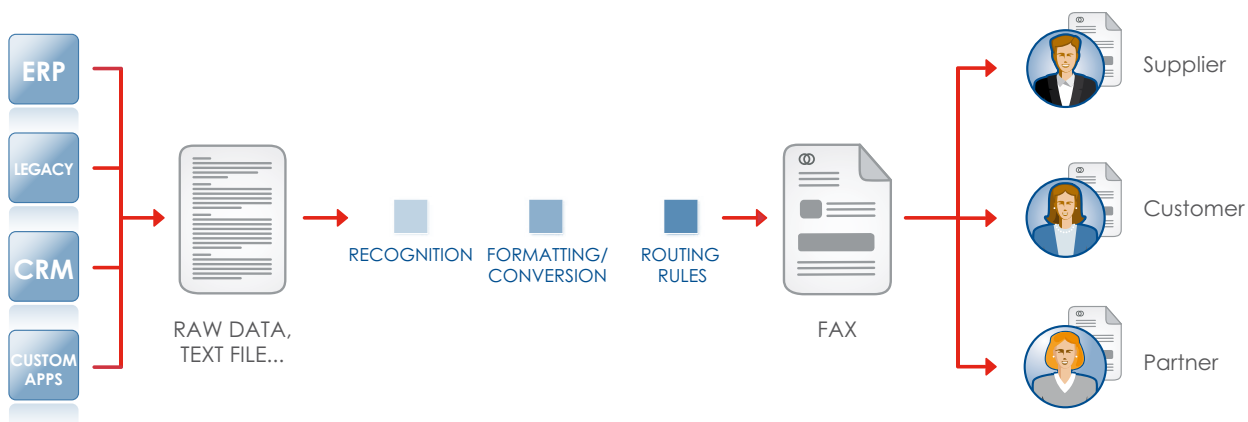
**Fax board support** — For maximum telecommunications efficiency and cost savings, Esker fax servers support intelligent fax boards, such as Brooktrout fax boards from Cantata Technology, as well as TAPI modems.

## Automation

**Fax tags** — Esker fax servers support fax command tags for flexibility and control over document processing, associating information such as destination phone number, sender name, and alternate phone number as a means of providing fax job specifications to the system.

**Image Recognition** — Image recognition capabilities with Esker fax servers automate routing of incoming fax documents to desktops by recognizing names, fax numbers and other information. Functionality encompasses OCR (optical character recognition) for alpha-numeric characters, OMR (optical mark recognition) for checkboxes and other marks, ICR (intelligent character recognition) for handwriting, 1D and 2D barcode recognition, and PDF output. Esker fax servers can extract data from the image of any well-structured business document for use with other applications and in creating new documents.

**Intelligent automation** — For maximum benefit and return on investment with documents generated by enterprise applications, Esker fax servers offer a content-based business rules engine (using patented Esker technology) to automate the entire fax composition and delivery process with no modifications to application-level code. This intelligent technology automatically recognizes text or print-stream content and, based on recognized criteria, enables the creation of business rules to identify the recipient, retrieve the fax number from an address book or database, format and convert the document, deliver the fax to the intended recipient and send fax status notification back to the originating application or user.





# On-Demand Fax Services

## More innovation, less infrastructure

Years of heavy investment in information technology has resulted in IT budgets today being consumed by maintenance. As organizations look to correlate IT with business processes and find ways to cut costs and streamline operations, interest in software as a service (SaaS) is increasing. With the necessary bandwidth, connectivity and Web Services technology available along with proven security standards, fax document automation as a service is a realistic solution for organizations to achieve measurable gains in efficiency and productivity. By removing hardware, migration and internal IT costs, SaaS can be as much as two times less expensive than traditional software.

## Addressing cost and capacity issues

Fax servers offer clear and significant advantages over fax machines. But they also carry fixed costs and capacity limits. Capital investment in a fax server typically does not match usage, as most organizations have daily fax volumes that are much lower than occasional peaks that occur at the end of the month or quarter. To accommodate these peak volumes, organizations are forced to choose more complex fax hardware infrastructure. Fax services automate the faxing process and provide unlimited capacity without the infrastructure costs of fax servers.

## Making the move

As organizations look to reduce the costs of providing information technology, the number of companies using IT services has steadily risen — especially for services such as document delivery. Key factors cited by IT industry analysts include the desires to focus on core competencies, leverage best-of-breed capabilities without capital expenditures and reduce operational costs.

In 2006, the market for fax servers grew just 0.4% to \$280 million while the market for Internet fax services grew 26.4% to \$570 million, according to fax market analyst Davidson Consulting. By 2011, 25% of new business software will be delivered as a service, according to IT analyst Gartner, and the SaaS market will grow to \$19.3 billion from \$6.3 billion in 2007, according to The Wall Street Journal. Esker research has found significant recognition of the value of outsourcing software solutions among its customers, who consider outsourcing an attractive option to automate nearly every type of document process — from accounts payable to sales order processing to accounts receivable.

## What to look for in a fax service

Organizations considering acquisition of a fax service should ask several key questions, including:

- Does the technology integrate well with desktop and enterprise applications?
- Does it provide management capabilities to allow easy adding and changing of users?
- Is the pricing model easy to understand?
- Is the fax service easy to use?
- Does it provide all necessary functionality?
- Does it offer proven reliability?
- Does it eliminate the need for in-house support?
- Is it possible to automatically archive each sent and received fax?
- Can it produce reports to determine the final status of all fax transmissions?
- Are there hidden costs?



## Robust fax infrastructure at your service

Designed to enable organizations to achieve the full value potential of fax automation as a service, Esker on Demand services offer fax delivery via multitenant applications residing at Esker production facilities strategically located throughout the world. Esker on Demand leverages proven Esker fax server technology for integration with existing desktop and enterprise applications. Customers automate faxing of business documents directly from business applications (ERP, CRM, legacy, mainframe, etc.) without hosting the fax infrastructure or spending money on fax equipment and supplies. Faxing directly from business and desktop applications is as simple for users as printing a document or sending an email.

Esker on Demand delivers the advantages of fax services by placing at your disposal a centrally maintained infrastructure for reliable and secure data processing. Your documents are handled with full confidentiality and traceability, and faxes are guaranteed to be sent and received in the shortest time possible. The worldwide network of Esker on Demand production facilities features:

- Secure transmission protocol (SSL)
- Back-up and monitoring between Esker datacenters for 24x7x365 availability
- Intelligent transmission management (multiple retries in case of busy signals)
- Least cost routing
- Telephone lines dedicated entirely to fax reception
- Dynamic line allocation and routing to prevent delays
- Real-time tracking of fax transmissions with detailed reports
- Archiving of sent and received faxes

And each Esker production facility acts as a backup for the others to provide 24/7 fax service.

## Functional benefits

Sending faxes electronically through Esker production facilities for processing and distribution offers advantages of flexibility, simplicity and reliability:

- Fax capacity available as needed for individuals, departments, divisions or an entire organization
- Unlimited fax capacity with no traffic restrictions
- Peaks in faxing, such as end-of-month invoice batches, are easily handled
- Reduced infrastructure complexity by eliminating telephony investments
  - No PBX upgrades
  - No additional dedicated telephone lines
  - No fax boards or modems
- 24/7/365 availability with multiple redundant backup systems for guaranteed delivery
- Seamless integration with existing desktop and enterprise applications for easy implementation and use
  - No custom programming
  - No disruption of existing business processes
  - No changes to existing file formats

## Cost efficiency

Flexible as-you-go payment options allow you to only pay for what you use on a per-page basis, providing complete cost predictability and control. Whatever capacity you require and no matter how you calculate the costs and savings, Esker on Demand works out to be less expensive than traditional faxing. With Esker on Demand you can:

- Enable automated faxing directly from enterprise applications — as easily as printing documents or emailing
- Eliminate workflow interruptions and manual handling costs associated with manual printing, faxing, and waiting for confirmation
- Significantly reduce equipment purchase expenses (printers, fax machines, fax boards) and ongoing costs for materials and supplies
- Eliminate telephony costs for line installation as well as rental and ongoing costs of fax calls
- Stop paying for unused extra peak capacity through the addition of dedicated fax lines and equipment
- Eliminate internal maintenance costs and external maintenance expenses
- Take advantage of additional e-document opportunities with delivery by email and postal mail

## Esker on Demand versus basic fax services

Compared with Esker on Demand, basic outsourced fax services lack integration (requiring users to learn a new interface), real-time status notification and other key capabilities.

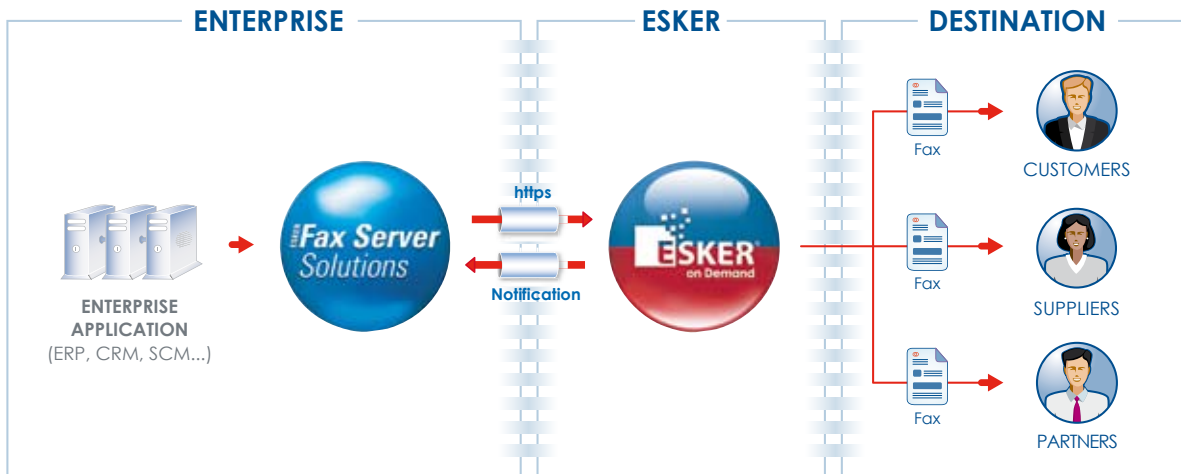
Feature	Esker on Demand	Basic fax service
Available 24/7	✓	
Real-time status notification	✓	
High-level service for high-value documents (invoices, account statements, credit approval, etc.)	✓	
Integration with enterprise applications	✓	
Real-time sending	✓	
No custom programming	✓	
Pay-as-you-go model	✓	

## Fax service option with Esker fax servers

To address issues of fixed cost and capacity limits while retaining the control and versatility of an on-premise fax server, Esker fax server solutions offer the option to automatically divert fax traffic to Esker on Demand fax services in the event of hardware failure or to manage high-demand peaks in fax volume. Fax traffic is sent to the on-demand service network for processing and delivery by secure Esker production facilities running 24/7. This option offers organizations the local control of a fax server as well as the unlimited capacity of a fax service.

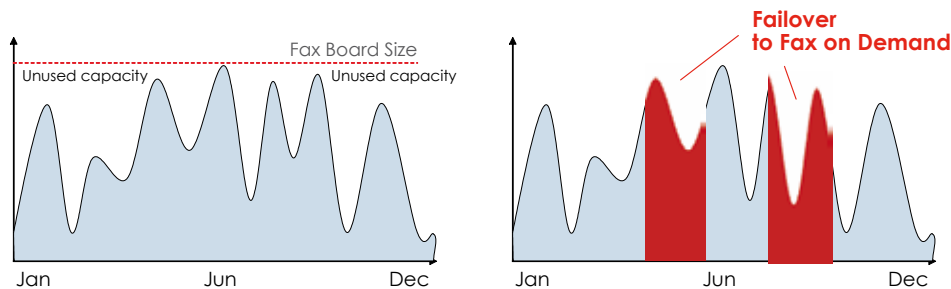
Users send faxes directly from common business applications through any Esker fax server solution (Esker Fax, Esker Fax for Notes, Esker VSI-FAX) or Esker DeliveryWare. Documents are securely routed via HTTPS to Esker production facilities where they are processed and delivered.

Real-time status notification enables users to follow their faxes from start to finish directly from their business applications or using Esker Document Manager — an easy-to-use, web-based client accessible from anywhere via browser. If a fax does not reach its destination, the user is directly notified and can take quick action to resend the document to its intended recipient immediately.

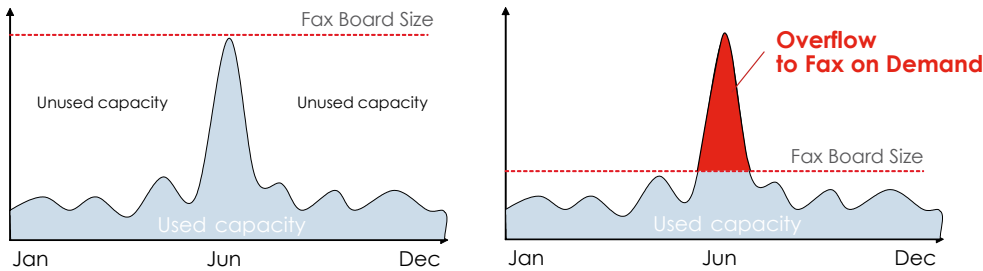


## Operational continuity

With the service option, Esker fax servers provide an additional failover system to help ensure continuity of business operations that rely on faxing. This capability offers assurance that fax delivery will continue if your fax infrastructure is not responding or is down. With so many business-critical documents going through your fax server, this feature helps you avoid costly downtime. Esker fax servers also provide a processing monitor tool to ensure that the software stays up and running.



With Esker solutions, organizations can also reduce fixed costs by investing in smaller fax boards to handle day-to-day fax needs and routing peak volumes to the on-demand service. With this overflow capability you can intelligently distribute fax loads among local fax boards or other Esker on Demand services. The distribution occurs following predefined rules based on fax status, account CSID, priority and fax number location.



### Fax as a 100% on-demand service

Esker also offers the advantages of automated faxing as a 100% on-demand service integrated with business applications and desktop applications. This option automates faxing processes and addresses capacity issues without the expense of purchasing, implementing and maintaining an on-premise fax server.

FAX SERVER	FAX SERVICE
HARDWARE PURCHASE 6%	INITIAL SET-UP 28%
SOFTWARE LICENSE 10%	PER PAGE FEE 72%
MAINTENANCE 25%	
IMPLEMENTATION & CUSTOMIZATION 33%	
TRAINING 10%	
TELCO COST 19%	
HIDDEN COSTS	HIDDEN COSTS

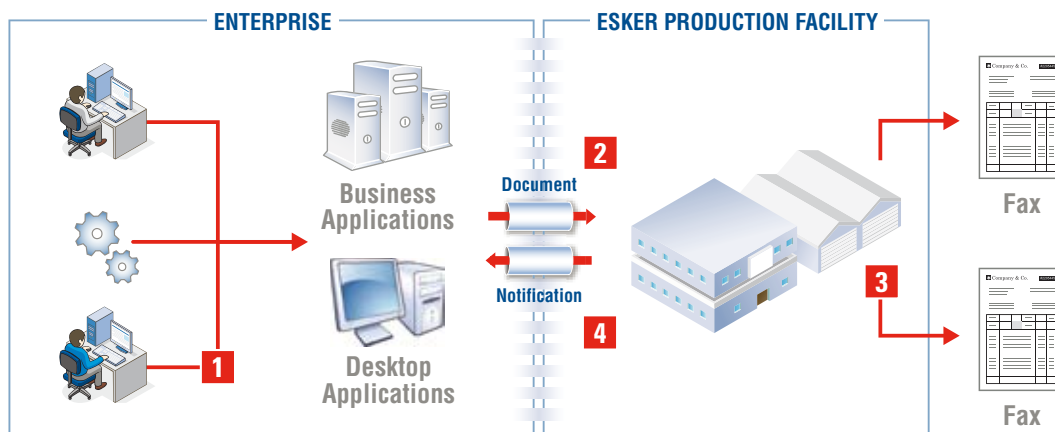
With 100% on-demand fax delivery services from Esker, organizations benefit from low up-front investment to gain the efficiency of automation with the flexibility of variable cost corresponding to traffic volume. There is no hardware to buy and no heavy software to install, as all transmissions are conducted via secure Internet connection protocol.

And you benefit from:

- Virtually unlimited capacity to easily handle large fax loads
- Fast deployment
- Minimized operating costs

As a cost-effective alternative to fax servers, 100% on-demand fax services from Esker eliminate the hidden costs of relying on a fax server without sacrificing integration with enterprise systems and local applications.

These services give businesses the ability to send and receive faxes, manage fax activity and integrate fax capability with applications. Documents are submitted by users from their application interfaces, and then transmitted to an Esker production facility via secure protocol. Faxes are sent by the Esker production facility and fax status is readily available to the user through their application and/or a web interface.



- 1** Fax is submitted from business or desktop application
- 2** Document is securely transmitted to Esker production facility
- 3** Fax is sent by Esker production facility
- 4** Fax status is directly fed into business applications and visible to users, or available through web interface

#### Production integration methods with 100% on-demand fax services from Esker include:

- SAP and other enterprise systems
- Web services (.NET, Java, PHP)
- FTP
- SMTP (email)

#### Desktop integration methods with 100% on-demand fax services from Esker include:

- Lotus Notes
- Web
- Microsoft Office suite
- Microsoft Windows (file > print from any application)
- SMTP (email)

# Choosing a Server, Service or Both

Organizations deciding between an on-premise fax server and an on-demand fax service need to analyze the benefits and the costs associated with fax servers. Along with fax infrastructure expenses, organizations should weigh any drawbacks of fixed capacity against the integration, customization and management control they get with a fax server.

With a fax service, organizations benefit from low up-front investment and flexible costs that vary according to traffic volume. There's no need to invest in and maintain hardware or software. Enterprises gain unlimited capacity to handle high-volume fax loads. The per-fax pricing of a service may seem expensive for smaller volumes, but that may be offset by the costs associated with fax servers.

To gain the full business and functional benefit of fax technologies available today, the ideal choice for many organizations is a vendor who offers all three options — on-demand fax servers, on-demand fax services and fax servers with fax service capability available — and has a proven track record of success.

Fax Servers and Fax Services — Pros and Cons			
	Fax Server	Fax Service	Server + Service
<b>Pros</b>	<ul style="list-style-type: none"> <li>▪ Tight integration with local applications (Microsoft Exchange, SAP solutions, Oracle)</li> <li>▪ Control over in-house fax server</li> <li>▪ More customization capabilities</li> <li>▪ Mature technology, comfortable for late adopters</li> </ul>	<ul style="list-style-type: none"> <li>▪ Low up-front investment</li> <li>▪ Flexible cost varying with traffic</li> <li>▪ Unlimited capacity</li> <li>▪ No software to install or update</li> <li>▪ No hidden costs</li> </ul>	<ul style="list-style-type: none"> <li>▪ Tight integration with local applications (Microsoft Exchange, SAP solutions, Oracle)</li> <li>▪ Variable capacity of the service</li> <li>▪ Ensures service continuity (overflow and failover)</li> </ul>
<b>Cons</b>	<ul style="list-style-type: none"> <li>▪ Cost (software, hardware, hidden costs)</li> <li>▪ Fixed capacity</li> <li>▪ Requirement to manage hardware failure situations (expensive backup plans)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Feeling of loss of control</li> <li>▪ Per-fax pricing may seem expensive for smaller volumes</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cost of the server model (software, hardware, hidden costs)</li> <li>▪ Cost of the service model (when used for small volumes)</li> </ul>

Source: Davidson Consulting; Sturgis, MI; 2007.

Whatever you decide, fax automation can enable your organization to better manage fax communications and business processes. Just gaining the ability to send faxes directly from the desktop without having to walk to a fax machine, or the ability to automate production faxing from enterprise applications, can deliver huge savings in labor costs alone. And every fax document can be automatically archived to support your organization's regulatory compliance efforts.

Fax automation solutions from Esker help organizations become more efficient and competitive by delivering documents faster, more directly and for less money than conventional means.



## About Esker

Esker is a recognized leader in helping organizations eliminate manual processes, gain process visibility and control, and reduce the use of paper by automating the flow of documents into, within and out of the organization. With patented document delivery automation software and on-demand document delivery services, Esker offers a total solution to automate every phase and every type of business information exchange. Customers achieve significant and immediate operational efficiencies, cost savings and measurable ROI in as little as three to six months. Founded in 1985, Esker operates globally with more than 80,000 customers and millions of licensed users worldwide. Esker has global headquarters in Lyon, France and U.S. headquarters in Madison, Wisconsin.

### Esker solutions

#### Document Process Automation

With capabilities to capture any inbound documents and deliver documents via any transport channel, Esker DeliveryWare integrates with enterprise systems to provide a comprehensive platform for end-to-end automation of sales order processing, accounts payable, billing, procurement, cash collection and other business processes. In addition to inbound and outbound fax, Esker DeliveryWare capabilities include capture of documents and data from paper mail, email, print and electronic documents such as XML and IDoc, and transport of documents via email, physical mail, print, web, wireless message, archive, copy to file, FTP, SQL, PDF, XML and more.

#### Fax and Mail Services

Esker on Demand offers the benefits of real-time, automated fax and postal mail delivery as a service fully integrated with enterprise and desktop applications — without adding hardware or software. Esker on Demand solutions include Fax and Mail Services offerings for:

- SAP applications
- Business applications
- Lotus Notes
- Desktop applications
- Specifically designed Software as a Service (SaaS) solutions

Esker on Demand offers the benefits of real-time, automated fax and postal mail delivery as a service fully integrated with enterprise and desktop applications — without adding hardware or software. Esker on Demand solutions include Fax and Mail Services offerings for:

#### Fax Servers

Esker fax server solutions integrate electronic document distribution with mission-critical business applications and provide the convenience of faxing directly from the desktop. As a leading fax automation provider, Esker offer delivers proven fax server solutions for:

- SAP applications
- Business applications
- Microsoft Exchange
- Lotus Notes
- Unix/Linux



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