



## DATASHEET

# RightFax Workflow Wizard

Improve Accountability, Connectivity, Control and Collaboration throughout the Document Lifecycle by Extending RightFax with Powerful Workflow Capabilities

## OVERVIEW

The newly redesigned RightFax Workflow Wizard, powered by Template, extends RightFax with workflow automation capabilities that enable RightFax users to improve connectivity, control, collaboration and accountability. The RightFax Workflow Wizard automates fax routing, approval and delivery processes to streamline business functions, such as processing insurance claims, loan approvals, mortgage applications, purchase orders and more. This enhances collaboration, improves productivity, reduces errors and accelerates processing times while providing an added level of process accountability and control not available with manual- or email-based routing and approval processes.

## FEATURES AND CAPABILITIES

**Add process accountability to faxing** - Inbound faxes are associated with predefined workflow processes ensuring that fax-related tasks are assigned to individuals or groups. Pervasive task lists ensure that faxes will not be lost or ignored, but instead will be processed in a timely and efficient manner.

**Build fax-enabled workflows without programming** - Enable knowledge workers or developers to create and deploy fax-based workflows by using the newly redesigned Web-based workflow wizard. The RightFax Workflow Wizard makes workflow development easy by providing a simple, intuitive visual interface, a WYSIWYG Web form designer, robust templates, pre-defined Web forms and custom actions. Custom actions include: send fax, receive fax, monitor job status and delete fax. Pre-defined templates enable accelerated model development by providing a fully functional pre-built model that can either be deployed or modified to suit an organization's specific requirements.

The new version of the RightFax Workflow Wizard features a redesigned user interface that makes it easier to build a workflow than ever before. Nontechnical workers are able to follow the step-by-step methodology to build and deploy a Web-based workflow without any coding or programming required. The wizard has been simplified to provide Advanced Knowledge Workers and nontechnical workers with a simple guide that directs users through a clear, linear workflow design process. A road map indicator provides an outline of the steps required to complete a workflow design. A "you are here" feature indicates where you are in the design process and how many design steps remain.

The new wizard features a more visual design and provides knowledge workers with easy access to a context-sensitive help button throughout the design process. The design for User interactive tasks and System interactive tasks is clearly differentiated to simplify the design process. User tasks feature icons to help users understand when new capabilities, such as "send an email notification," are added to a task. System features, such as the "receive a fax custom action," are provided with clear instructions and field auto population whenever possible.

## CAPTARIS RIGHTFAX WORKFLOW WIZARD FEATURES A NEW DRAG-AND-DROP WEB FORM BUILDER

The RightFax Workflow Wizard continues to feature a library of sample Web forms but now also features a new Web browser-based WYSIWYG drag-and-drop Web form designer. The simple Web form designer enables nontechnical workers to build Web forms, and then add or relocate Web form controls on a form canvas. Control Properties are clear and accessible. Labels, check boxes, textboxes, etc., can be easily relocated and renamed to suit the needs of the users. Radio buttons can be easily grouped and optionally set as pre-selected to simplify both the designer and user experiences.

**Receive and route faxes** - Monitor RightFax accounts for new inbound faxes. Route received faxes based on the DID to appropriate people or departments to initiate or facilitate a workflow.

**Monitor status** - Check fax status including tasks, subordinates' tasks and the overall workflow process through the task list and overdue task list. Monitor overdue faxes to ensure that faxes are addressed in a timely manner.

**Send faxes** - Initiate a fax to a single recipient as part of an established or new workflow process.

**Send notifications** - Send email notifications internally or externally to notify responsible parties that they have fax-related tasks that need their attention.

**Monitor business activity** - Manage the status of inbound faxes through Business Activity Monitoring (BAM). Generate productivity graphs and tables and export BAM data into Microsoft Excel for further analysis.

**Purge faxes** - Delete faxes from the server to free up server resources.

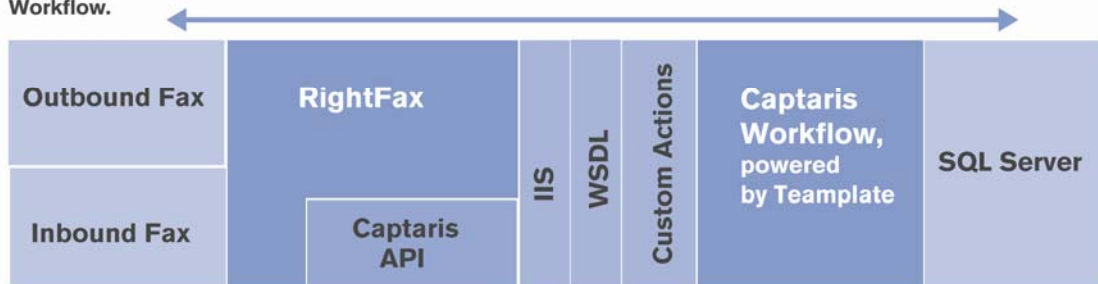
## HOW IT WORKS

The RightFax Workflow Wizard provides the ability to create workflows for RightFax deployments. It ships with a user administration tool, a workflow server (or engine), a Web-based wizard-driven workflow development environment, a set of pre-defined model templates and Web forms to help design workflow for receiving, routing, approving and sending fax documents. The RightFax Workflow Wizard leverages functionality of both RightFax and Captaris Workflow technologies and uses Web services to integrate the two products, embed receiving and sending faxes within workflow.

RightFax sends, receives and internally routes faxes. The RightFax Workflow Wizard uses an exposed Web service on the RightFax server to read inbound or send outbound fax information. The RightFax Workflow Wizard polls the RightFax server and passes the inbound fax image/metadata to the Workflow engine. As the workflow process advances, the workflow routes the fax based on user input and business logic. The workflow engine stores fax images in a shared virtual folder using IIS. These faxes can be referenced by a hyperlink from within a special Web form.

### RightFax Workflow Wizard

Inbound and outbound faxes are managed by RightFax. Information from the fax is passed via IIS and a Web Service into the RightFax Workflow Wizard which then accesses the process model in Captaris Workflow.



COMPONENTS	SYSTEM REQUIREMENTS
Captaris Workflow Database Setup 5.0.x.0 Captaris Workflow Server Setup 5.0.x.0 Captaris Workflow Server Client Tools 5.0.x.0 Captaris Workflow IIS Setup 5.0.x.0 or Captaris Workflow Server SharePoint Integration 5.0.x.0 Captaris Workflow RightFax Adapter Installation 5.0.x.0 Captaris Workflow RightFax Repository Installation 5.0.x.0	Microsoft Server 2000 and Server 2003. This includes clustered servers. RightFax 8.7 or 9.0 SP1  Microsoft .NET Runtime (Version 1.1 of .NET Framework) IIS 5.0 or higher and access to Microsoft SQL Server 2000 and SP3

## A CUSTOMER SCENARIO EXAMPLE (AUTO INSURANCE CLAIMS)

**Situation:** An insurance company processes automobile accident claims from their policyholders. As part of the claims processing procedure, incoming claim forms and accident reports are received via fax. Each of these inbound fax claim forms must go through the same repetitive routine for the claim to be settled and auto repair or replacement to follow. Information must be entered; claims must be routed, reviewed and assessed; and then approved or denied. Finally, agents and policyholders must be notified for a settlement to be issued and executed.

**Challenge:** Organizations that complete this routine manually or using email alone face multiple problems, including lost documents, erroneous information, slow and costly claims processing, lack of accountability in the decision-making process and no control environment to monitor and manage the life cycle of the automobile insurance claim document.

**Solution:** RightFax and the RightFax Workflow Wizard automate routing and approval of auto insurance claims documentation to add process accountability, improve efficiency and eliminate errors. The RightFax Workflow Wizard also reduces loan processing time and costs and provides an escalation procedure to ensure the timely processing of each claim.

**How it works:** An inbound fax insurance claim can be received by RightFax and then passed into a predefined workflow for processing. As soon as the workflow is initiated by the inbound fax, a task is assigned to an individual or a group and that task is then populated into their workflow task list. In addition, an optional email notification can be sent to them indicating that a workflow task needs to be performed. The workflow can be designed to either be automatically routed based on inbound DID metadata information, or it can be manually routed by a processing clerk based on information contained within the fax image itself. To ensure that the fax is managed in a timely manner, escalation capabilities can be built into the business rules for each workflow. When each task is assigned, the escalation timer begins to count down. If the task is not completed by the due time, reminder email notifications can be issued, and/or the task can be reassigned to an overflow team or to a manager for completion. The tasks are typically performed by completing a Web form containing a link to the fax, and possibly, also a link to previous users' notes. When the workflow is completed, the final task would typically send a fax to the originator indicating the status of the claim.

The entire process is efficient, controlled and accountable. Faxes are addressed in a timely manner and cannot be lost, misplaced or ignored. Workflow-enabled business rules can be used to substantiate the organization's claim process and ensure that personnel are following approved procedures. Workflow task lists clearly communicate which tasks are assigned and when they are due. BAM provides managers with real-time insights into the status of all workflow activities.

## DESIGN LIMITATIONS OF A WIZARD

Captaris has provided the RightFax Workflow Wizard to enable users with a step-by-step, linear, wizard-driven, development tool for developing simple fax-triggered workflow for fax routing and approval models. The RightFax Workflow Wizard is designed to empower nontechnical workers to build workflow models without any knowledge of scripting, programming or developer environment. The RightFax Workflow Wizard is designed to provide organizations with a simple fax routing and approval workflow solution delivered in a wizard format. In order to provide a simple wizard-driven solution, some functional limitations inherently must exist:

- The RightFax Workflow Wizard provides users with a visual, graphical process map to view the overall process and the current status of each task within that process. The map provides a visual representation of the workflow and does not directly impact flow functionality. The RightFax Workflow Wizard manages the placement of tasks within this map and does not provide users with the ability to easily manipulate location placement within this visual map. To simplify the building of a workflow the RightFax Workflow Wizard manages task placement upon this map and does not force users through a sophisticated graphical drag-and-drop exercise. The result is that the RightFax Workflow Wizard provides a simplified build process but limits the control over the visual process map image that is produced to depict the overall workflow.
- The RightFax Workflow Wizard provides users with a series of predefined Web forms to streamline the building of customized workflow models. The RightFax Workflow Wizard allows users to select forms from a form library and perform minor edits to those Web forms. To simplify the workflow build process the RightFax Workflow Wizard limits a user's ability to have full control over the placement and editing of Web form controls within Web forms.
- The RightFax Workflow Wizard is able to automatically direct workflow routing by reading DID information encapsulated within the fax metadata. This, however, is only possible when the inbound fax has been created containing the DID information, which is then stored in the fax metadata for future access.
- The RightFax Workflow Wizard does not provide the ability to pass information from one workflow task to another workflow task. Data entered into one task form cannot be accessed by another task.
- The RightFax Workflow Wizard attempts to reduce the complexity associated with building workflows. The RightFax Workflow Wizard provides step-by-step guidance with the assumption that the user building the workflow has knowledge of RightFax, Captaris Workflow, general workflow design principles and an understanding of the use of XML in model design.

## WORKFLOW SOLUTIONS BEYOND THE RIGHTFAX WORKFLOW WIZARD INTEGRATION

The RightFax Workflow Wizard is designed exclusively to extend RightFax with workflow automation capabilities. For workflow solutions that include reporting functionality and/or integrate with other business applications, such as ERP and CRM systems, Captaris offers the complete Captaris Workflow solution which is powered by Teemplate. Captaris Workflow provides easy, flexible and integrated business process workflow for organizations in any Microsoft or enterprise application environment, enabling dramatic improvements in productivity, accountability and compliance.

## FOR MORE INFORMATION

Captaris Business Information Delivery solutions help organizations of all sizes automate the information and document flow throughout the information lifecycle (capture, process, archive, deliver). With a comprehensive suite of software and services, Captaris helps organizations to grow revenues and increase profits while meeting compliance goals. Through a global distribution network of leading enterprise technology partners, Captaris has installed more than 90,000 systems in 95 countries in companies of all sizes, including the entire Fortune 100. For more information, visit [www.captaris.com](http://www.captaris.com) or call 1.800.443.0806.

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