Captaris® RightFax®

FEATURES

- Capture images into any existing or new SharePoint document library for edit and manipulation
- Quickly configure and start using provided Site Template for first image library
- New Content type provided for inserting text into New Paper metadata fields and capturing associated content in documents for follow-up text search
- Receive document images from MFPs, scanners and fax
- Notify users of image import via automated alerts and RSS feeds
- Automated routing between Captaris image delivery and SharePoint document libraries
- Imported or sent images are available for capture, routing, workflow and business process automation
- Import, manage, create and send documents and image metadata directly within SharePoint Server 2007
- Upload documents and images from network to SharePoint libraries for automated document-centric processes
- Use separate OCR applications for extracting metadata and populating into new InfoPath or Web forms posted in SharePoint libraries for additional enterprise search
- Any document or image needing routing, choose Send for distribution
- Automate Scheduling Services for image import, cleanup and tracking

Captaris® RightFax® Connector for Microsoft® Office SharePoint® Server 2007

Capture Images Directly into SharePoint Server 2007 and Automate Business Processes

OVERVIEW

Customers use SharePoint Server 2007 everyday for content management, enterprise search and business process enablement. Since a captured image is typically the start of a business process needing automation, Captaris easily enables automatic import of document images sent from MFPs, scanners and fax. Images imported from Captaris automatically populate configured SharePoint libraries so users can select files for additional business processes using OCR and data workflow systems.

With OCR applications, extracted metadata can now be populated to an InfoPath form, or SharePoint library, providing the ability to perform enterprise search, driving alerts, RSS feeds and synchronization with Microsoft Office Outlook® 2007 or other Office applications.

Enhanced image management is now possible with the RightFax Connector for SharePoint as images delivered to SharePoint libraries can now conform to enterprise document policies, security and life cycle management, providing improved compliance and accessibility.

HOW IT WORKS

Take Advantage of Easy Image Capture and Document Collaboration

With RightFax Connector for SharePoint, imported images and associated metadata are available for automated business processes that were previously allocated to prior manual routines. By automating the process of importing images directly to document libraries, users view files in a site and select images for review and advanced services. Advanced services are designed using additional application features inherent in SharePoint or separately obtained to OCR and processes image metadata for enterprise search.

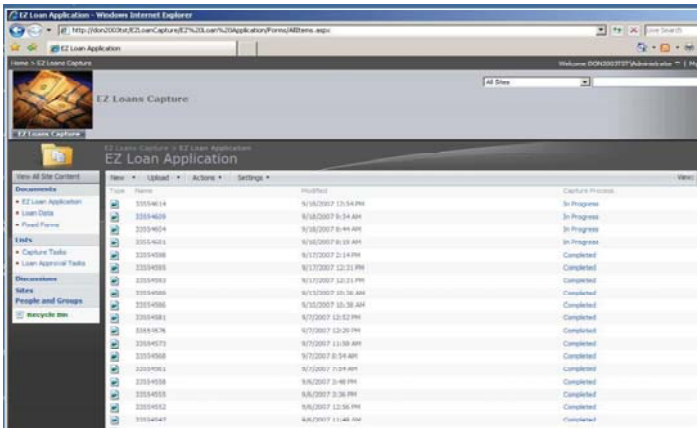

Figure 1. In this customized example and theme, users receive and view their images conveniently in a SharePoint library

Use in Document Capture Environments

The RightFax Connector for SharePoint allows automation of repeatable document processes. For instance, a common loan process is the acceptance of a rapid credit review and prequalification request. These are typically received as completed forms faxed to the mortgage company. With the RightFax Connector for SharePoint, these forms automatically appear inside SharePoint as a captured image that can now participate in a review process and approval workflow.

Another repeatable process involves organizations and individuals questioning line items on an invoice. Many organizations accept invoice disputes delivered as inbound faxes on a daily basis. The review and processing of these disputes can now be automated as the images are routed to SharePoint where Accounts Payable personnel can capture the relevant metadata from the images and drive resolution through corporate business approvals.

Design Automated Processes for Easy Tracking, Notification and Routing

Track your images by configuring a document library to populate automatically as images arrive. Available metadata can be saved and used for automated workflow and routing services. Configuration filters allow managed distribution and display of incoming images viewed by Paper Type data including: Day, Sender, Status and other desired filters.

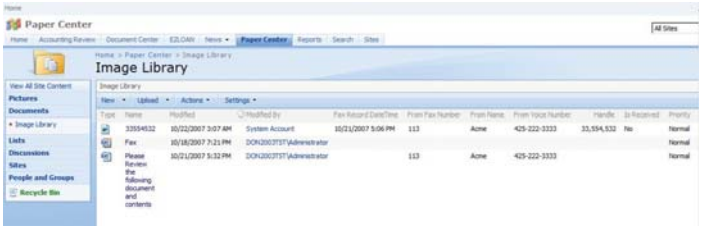

Figure 2. Document library is automated for arrival of images and data

Figure 3. Manage Your Document Task Lists through Alerts, Email and RSS Feeds

Users are automatically notified of image import via alerts and RSS feeds. Alerts and RSS feeds are designed in the library Actions menu to notify users when images are available for review and additional processes. Capture and routing images for import and metadata retention to SharePoint document libraries automatically enables collaboration and triggers image-enabled document-centric business processes. Users can choose image and review for OCR metadata extraction to populate line of business applications.

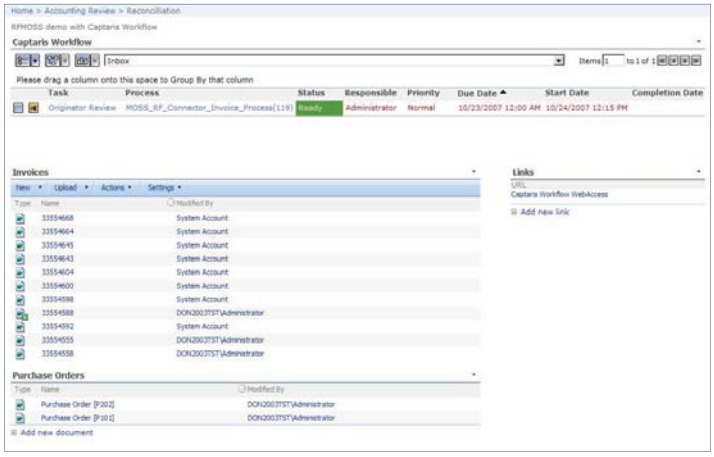

Figure 4. Use Captaris Workflows for Automated Approval Routing and Submission

Captaris Workflow™ integrates with SharePoint and enhances RightFax Connector for SharePoint to automate image routing, submission and task alerts for event notification of imported images for approval. Images or document events triggers a number of steps that enable users to easily manage repeatable document and data processes.

Creating and Capturing Document Metadata is Easy

It's easy to create and manage document metadata directly within SharePoint Server 2007 using the RightFax Connector for SharePoint. Users can upload documents and images from the network into SharePoint libraries for document capture and routing.

Furthermore, when creating a new document, select the New Paper feature from any document library in SharePoint Server 2007. When a user selects New Paper, the user adds the relevant document metadata in fields available in a toolbar for quick and easy insertion, capturing associated content for follow-up text search. The user completes the task and metadata is now available for enterprise search and distribution.

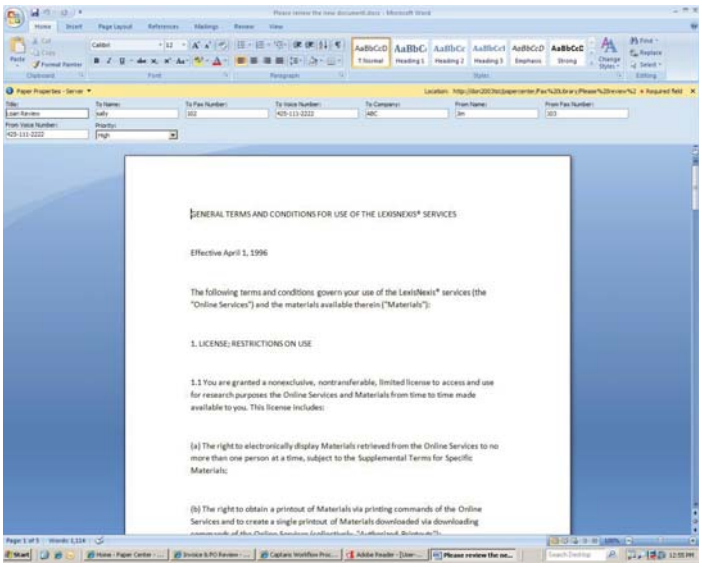

Figure 5. Creating and Capturing document metadata

Select Paper Center Site Template for Easy Setup and Configuration

The RightFax Connector for SharePoint provides a Paper Center site template for easy setup of image libraries with subscriptions to automate importing and routing of documents and images. With Captaris Servers mapped directly to SharePoint, images and documents are automatically imported into libraries for imaging, OCR and workflow business processes using SharePoint Server 2007 or other applications. Captaris Workflow enhances automated image and data routing and submission for event task approvals. Creating and capturing metadata allows for follow-up enterprise search of text information.

REQUIREMENTS

- RightFax Server 9.3 or later
- RightFax Server 9.3 FP2 for Office 2007 Document conversion
- RightFax Connector for SharePoint 2007
- Microsoft Office SharePoint Server 2007
- Microsoft Windows Server 2003 or later

Optional

- Captaris Workflow
- Captaris Single Click Entry

ABOUT CAPTARIS, INC.

Captaris, Inc. is a leading provider of software products that automate business processes, manage documents electronically and provide efficient information delivery. The products of Captaris and its subsidiary Castelle, including Captaris RightFax, Captaris Workflow, Captaris Alchemy® and the Castelle FaxPress line of products, are distributed through a global network of leading technology partners. We have customers in financial services, healthcare, government and many other industries, and our products are installed in all of the Fortune 100 and many Global 2000 companies. Headquartered in Bellevue, Washington, Captaris was founded in 1982 and is publicly traded on the NASDAQ Global Market under the symbol CAPA. For more information, please visit www.Captaris.com.

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