



DATASHEET



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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Captaris® RightFax® XML Generator

OVERVIEW

The RightFax XML Generator is an add-on module for RightFax Servers that outputs fax image files with fax metadata in XML format. It is used to integrate RightFax with XML-based business applications. The RightFax XML Generator replaces the need to use the RightFax API and is more flexible than a simple network file drop, commonly used today. Using the RightFax XML Generator, RightFax administrators and integrators will recognize a variety of benefits and advantages including:

Easy integration Templates, wizards and pre-configured DataFlows to simplify configuration, integration and management

Lower costs and faster deployment Integrators can take advantage of industry standard XML data to quickly fax-enable business applications. This cuts the time, cost and resources needed to automate document-based business processes between various applications.

FEATURES

Real-time export of fax image files with XML metadata

- Fax image files combined with XML metadata are exported from a RightFax Server and can be easily consumed by any third-party application
- Support TIF, PDF and DCX file formats
- Save XML data and fax image files in a single folder or in multiple folders
- Export faxes from RightFax on a per user, per server or system-wide basis

Administration

- Use common administration tools to install, activate, configure and manage the XML generator
- Monitor and manage connectors and processors, add and delete processor services and configure components using centralized monitoring and management interface
- Support compliance, security and business continuity efforts by taking an unalterable snapshot of the fax image file of each fax job before it is processed

XML templates and fax metadata macros

- Streamline integration using sample XML templates that contain a combination of formatted XML and fax data macros
- Configure sample templates to easily integrate with business applications and different environments
- Use data macros in the XML templates which correspond to the fax metadata stored in the RightFax document

Advanced settings

- Change one or more document configuration settings using advanced configuration tools
- Edit XML template files to accommodate data format requirements of any third-party application
- Create custom file naming schemes for either the image files or XML files

HOW IT WORKS

The RightFax XML Generator is an add-on module for the RightFax Server that outputs sent or received faxes into image files accompanied by corresponding XML-formatted fax metadata. The XML-based output files can be imported into any ECM, ERP, workflow or similar applications. The RightFax XML Generator uses a Captaris technology known as External Document Connector (EDC). It is a file processing engine designed for managing document flow to and from RightFax and other Captaris products. This foundation-level technology provides the XML Generator a core set of management and administration tools known as EDC Manager and EDC Monitor.

The RightFax XML Generator is installed on a RightFax Server. Once activated, a preconfigured XML Generator “DataFlow” is presented. A DataFlow is a combination of unique “FlowPoints” which conduct actions on a fax document as it is processed by the XML Generator. The default DataFlow will quickly enable the export of faxes and their XML metadata to a specified network folder. The RightFax XML Generator works in conjunction with the user settings of the RightFax Server. Rules can be set to export either all sent, all received, or both sent and received faxes on a per-user or system-wide basis.

Advanced Settings

RightFax administrators or third-party integrators will enjoy the flexibility of the XML Generator. Administrators have many options to customize a variety of settings within the XML generator:

Configuring or creating an XML template file

RightFax Administrators or integrators can make changes to the default XML template file or create new XML templates to conform XML data to third-party application requirements. The XML Generator includes “document data macros” that can be applied in a template to capture various fax metadata.

Configuring the FlowPoints within the DataFlow

The XML Generator module contains four numbered FlowPoints specific to the RightFax XML Generator which includes:

- Converting images, generating XML, copying images and XML

These FlowPoints can be configured to change the fax image format; the fax image naming schemes; apply special filters, etc.

Setting the network folder destination

Users may specify either a UNC path or a folder name on a mapped or local drive. Or, use lookup tables to apply rules.

Fax Metadata

Fax metadata is information about the fax. The XML Generator includes “document data macros” that can be applied in a template to capture various fax metadata. A list of the metadata follows:

{BillingInfo1}	{NumberOfImages}
{BillingInfo2}	{PageNum}
{CallerID}	{Receive Time}
{Caller Station ID}	{Receive Time String}
{Date}	{RemoteCSID}
{DateTime}	{SendDuration}
{DID/DTMF/ANI}	{Time}
{FaxAttributes}	{ToCityState}
{Fax Channel}	{ToCompany}
{Fax Server}	{ToFaxNumber}
{FromCompanyFaxNumber}	{ToName}
{FromCompanyVoiceNumber}	{ToVoiceNumber}
{FromFaxNumber}	{Transmission Status}
{FromName}	{Transmission Type}
{Job ID}	{UniqueID}
{JobType}	{UserID}

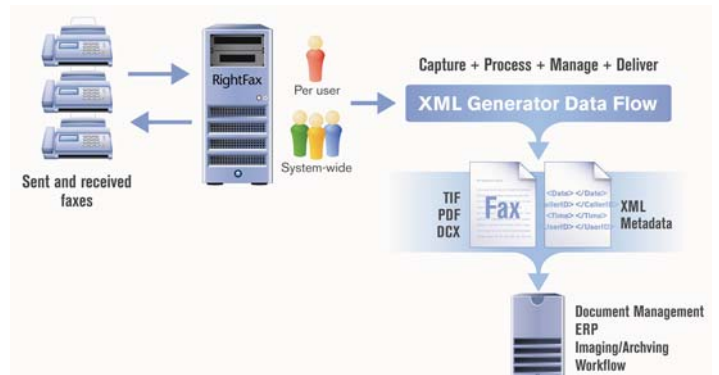


Figure 1. The XML Generator works in conjunction with the RightFax Server that sent or received faxes. These are exported into image files accompanied by corresponding XML-formatted fax metadata. The XML-based output files can be imported into almost any ECM, ERP, workflow or similar application.

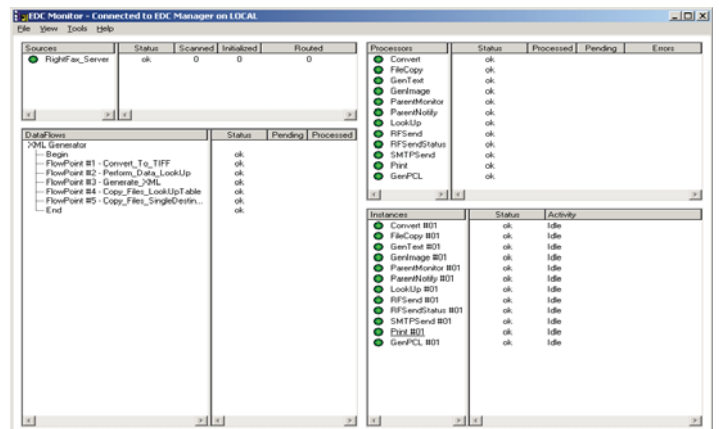


Figure 2. The XML Generator EDC Monitor showing the DataFlow, which consists of configurable FlowPoints

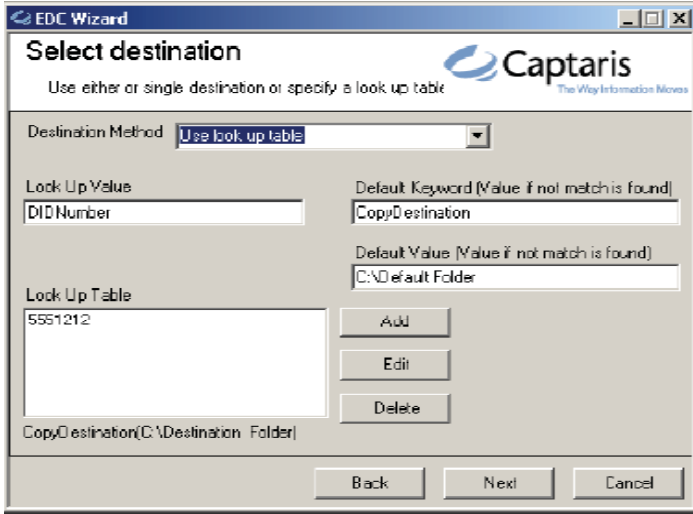


Figure 3. The XML Generator EDC Wizard: A lookup table can be used to apply filtering rules like DID number to capture and route faxes to specific destinations

REQUIREMENTS AND CONSIDERATIONS

- Requires a RightFax Enterprise or Business Server 9.0 or later
- Must not be installed on the same server as the RightFax Connector for FileNet P8 or the RightFax Connector for Hummingbird Enterprise DM