

## Is Your Office Truly *FAX* Integrated?

A **Radically Easier** Way to Integrate *FAX* with Microsoft Office Applications

*How integrating  
**FAX** into  
Microsoft Office  
environments  
can improve  
productivity  
and business  
communications*



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# Is Your Office Truly FAX Integrated?

## Executive Summary

Analogous to how email functionality is now offered as a “service” available within many applications, so has FAX capabilities evolved in the 21<sup>st</sup> century. Fax messaging now blends seamlessly with programs such as Microsoft Word, PowerPoint, Excel and more - giving users even greater power and versatility. Similar to how “printing” is performed from within applications, users can simply “File-Print-Fax” to send faxes directly from whatever program they are using.

Every day, fax machines are being replaced with integrated, easy-to-manage network fax solutions that allow users to quickly and easily send, receive and manage fax communications right from their desktops, directly from whatever application they are using.

Integrating fax, a core messaging mainstay, directly into the Microsoft Office applications that users depend on daily provides more productive, efficient and easy-to-use ways for users to communicate and carry out mission-critical business processes, such as faxing contracts, legal documents, sales quotes, purchase orders, order confirmations and more.

Despite messaging advances, FAX remains an essential business communication staple.

Twenty-first century fax solutions integrate seamlessly with Microsoft Office applications giving client applications like Word, Excel and more even greater messaging power and flexibility.

This guide discusses the prevalence of two fundamental mediums that users depend on: Microsoft Office and FAX. It outlines the prevalence of Microsoft Office and the fax messaging challenges its business users encounter. Above all, it discusses how fax works together with Office to deliver clear and substantial benefits to users. This whitepaper provides usage examples of Office-to-Fax integration while showing the benefits these technologies can bring to any size organization.

*More than 50% of email is spam, thus fueling even more companies than ever to depend on “fail-safe” communications methods like fax. Since fax usage isn’t declining, how is your organization taking this communications bedrock into the 21<sup>st</sup> century? Are you continuing to “get by” sending via fax machines or by relying on less savvy fax solutions that can’t offer “true integrated faxing” from within user applications?*

## State of the Market for Microsoft Office

Microsoft’s Office applications packages, first introduced 15 years ago, are an undisputed force in the software industry, with 400 million users in 175 countries, more than 90% market share and sales of about \$10 billion annually. Microsoft estimates that Office 2003, released October 2003, will support a \$117 billion market of related services within the next three years.



Microsoft Access

Microsoft has moved away from “suite” in describing its inter-related products as Office System 2003 encompasses both desktop applications and server software. Included in Office System 2003 are the staples that almost everyone is familiar with - Access, Excel, FrontPage, Internet Explorer, PowerPoint, Internet Explorer, PowerPoint, Outlook and Word.



Microsoft Excel



Microsoft Word



Microsoft PowerPoint

In addition, Microsoft introduced some new features in 2003 targeted at the business user - the integration of XML throughout, rights-management tools, and tie-ins with the Share Point Server.

Microsoft Office users are a diverse group. Many perform specialized tasks like writing contracts, press releases or legal agreements in Word or creating sales reports, financial summaries or tracking inventory levels in Excel. Others compose PowerPoint presentations for technical training or trade show demonstrations. Most use Internet Explorer to browse the web. Regardless of their individual job, title or project at hand, Office users are part of a large group that depend on these programs to perform their jobs effectively.

## Need for Seamless Microsoft Office FAX Integration

Now more than ever, Office users need to perform messaging functions directly from the applications they are working in.

For example, a sales manager has updated various pricing lists and needs to email and fax the revised pricing guides to her distributor list.



One of the biggest challenges faced by organizations is the ability to empower 100% of their users.

Now, more than ever, meeting the diverse needs of all employees is not an easy undertaking because users possess varied levels of application expertise and perform different jobs.

In general, most users have no time for requisitioning, installing and learning new software, or for dealing with IT intermediaries.

She has a couple of options:

- From the fax machine manually fax to each recipient (time-consuming); or
- Open a separate, proprietary fax program (WinFax PRO or a fax client application), set-up, enter or browse to the fax numbers, locate the file on the network, attach it, send and then close the program (while this task is performed at the desktop, it can also be time-consuming as users are required to open additional programs and perform fax messaging from outside of the application they were working in)

Equally frustrating can be the faxing challenges the IT side encounters: TRULY integrating “FAX,” a business communications bedrock into an environment of multiple and usually incompatible information and messaging systems sometimes requires prodigious amounts of tweaking, spit and bailing wire by network administrators.

### Challenge

- Finding a fax solution that works “hand-in-hand” with Office applications as well as integrating with other technology infrastructures and business practices
- Introducing fax capabilities that **DO NOT** force users to sacrifice how they do their already established, “day-to-day practices
- Implementing simple, self-service tools that require no user training while being easy-to-administer
- Ensuring that the solution remains cost-effective even when deployed to multiple locations or across an enterprise

### Solution

- Replace fax machines and/or proprietary fax programs that are unable to integrate directly with user applications
- Implement a comprehensive, truly integrated fax solution that addresses the diverse needs of all users – both technical and non-technical – while satisfying IT requirements

### Results

- Improved productivity while significantly speeding fax communications processes
- Minimized IT involvement and user support or training with easy deployment and simplified administration
- Improved scalability – sufficient capacity for fax volumes
- More time for staff to concentrate on core concerns
- Maximized cost efficiencies leading to increased overall profitability
- No more late or lost faxes which impacted revenues

**Question:** Are you continuing to “get by” sending via fax machines or by relying on less savvy fax solutions that can’t offer “true integrated faxing” DIRECTLY from user applications?

## How Integrating FAX Benefits Microsoft Office Users

This KISS principle has seemingly always stood the test of time - even in the IT arena. *Keep it Simple, Stupid* is especially important where all too often the “management solution” becomes the “management problem.”

*In 2003, research firm IDC estimated that IT-deployed technologies are used by fewer than 10% of users who have the skills, time, or willingness to learn them. While power users have always shown an eagerness to learn new business tools, most users show little patience for roadblocks that stand between them and the ability to perform their jobs. The need is stronger than ever for comprehensive, easy-to-use FAX solutions that offer simple, self-service tools for Office users.*

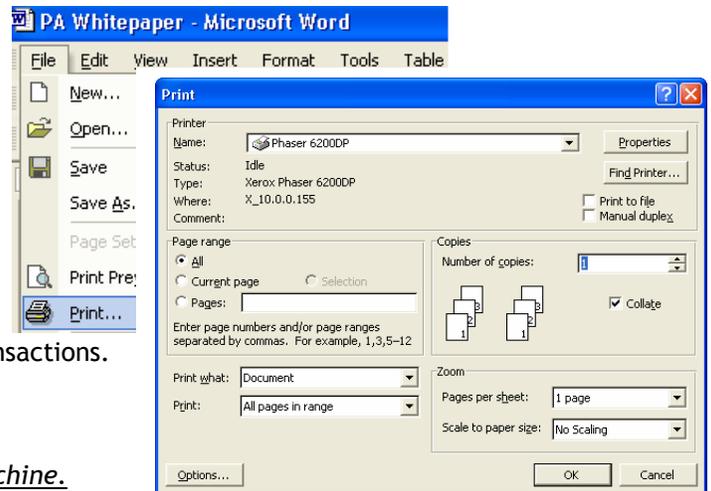
### Where 21<sup>st</sup> Century FAX Meets the KISS Principle

While users have various levels of application expertise, the vast majority do know how to print - from whatever applications they are using.

And although users are printing different documents such as invoices, forms, purchase orders, requisition requests, product datasheets, reports, spreadsheets, letters, press releases or presentations - they are still printing.

These documents are the foundation of business transactions.

*Integrating FAX capabilities directly into Office and Windows-based application has a proven 90% increase in productivity over sending from a fax machine.*



The dilemma is choosing the technology that is right for your organization.

Old ways of handling and faxing documents - fraught with inefficiencies and rooted in outdated manual processes - are changing. Many companies are adopting a new generation of “ready-made” FAX solutions that aren’t requiring companies to invest in any user training or significantly modify day-to-day user activities by changing their behaviors.

The simple process of “printing” is becoming more strategic and beginning to be used in “on-demand” Office environments.

These “next generation” fax solutions, integrate seamlessly with user applications and are capable of processing dozens, hundreds - even thousands of documents per day with superior accuracy, speed, and, most importantly, simplicity. These evolved fax solutions embrace a company’s investment in existing computing resources: it’s business-critical, core business software applications like Microsoft Office.

This type of “forward-thinking” fax solution essentially “turbo-charges” the fax preparation and delivery process that, all too often, is referred to as the “document drag” of paper-based processes. And for the end user, it does it with a simple click of the “Print” button. It completely embraces the applications your users already depend on, eliminating IT involvement on the user-side.

By just printing - documents are easily created and delivered - without adding another layer of complexity to what may already be a complex technology infrastructure. As long as the user’s application has the ability to “print,” this type of fax solution works right in tandem. *In essence, this type of integration can be described as a “strategic” FAX output processing and delivery tool that embraces any application a user depends on.*

## Usage Scenarios: How FAX Works with Microsoft Office Applications

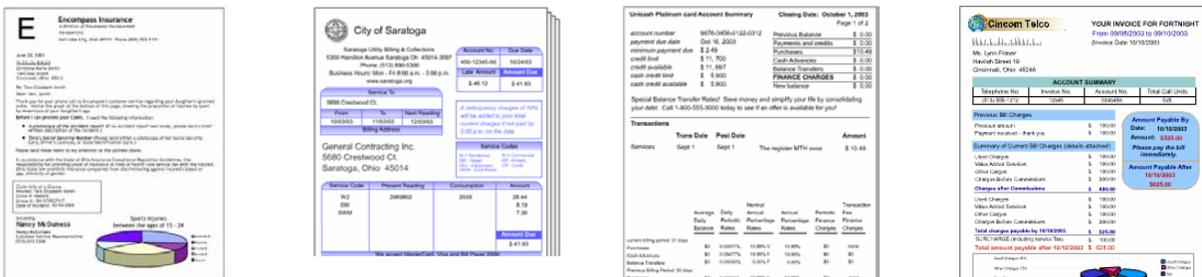
By simply “printing” from a Microsoft Office application like Word or Excel - or any Windows-based program for that matter - documents can be quickly processed and delivered as laser-quality faxes to their intended destinations. As long as the user’s application has the ability to “print,” integrated fax servers work right in tandem.



As seen in the example above, this simple - yet sophisticated approach takes “ready to send” documents and instantly delivers them via fax - streamlining the business messaging process - while eliminating the inefficiencies and inaccuracies of fax machines or proprietary fax applications that do not fully integrate with client programs.

Business communications created in Office applications as letters or spreadsheets to policy holders, insurance claim documents, legal mandates, financial statements and more can be created, processed and delivered via fax instantaneously and with minimal user effort.

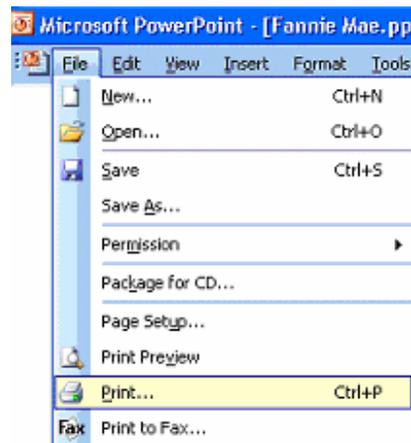
To send out multiple document format types as a single fax, users simply Print-to-Fax from any Office application. Thus combining information stored in an Excel spreadsheet with a Word document or HTML file into a single fax can be done with a few simple clicks.



## Merging FAX with Email by Simply Clicking “File > Print” from An Office Application

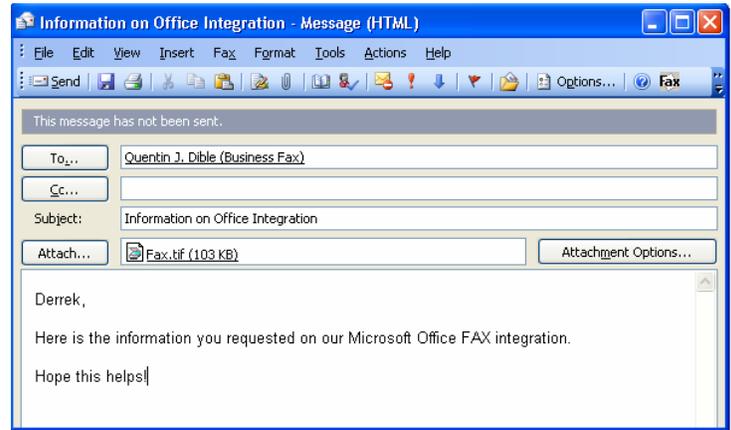
Integration is an essential requirement in virtually every IT strategy. Many companies today are leveraging their existing investments in email applications like Microsoft Outlook as combining email/fax functionality offers the ability to streamline business processes while reducing costs.

Right from PowerPoint, for example, a user can print to select a document or multiple documents to combine into one fax.



An integrated fax server, like NET SatisFAXtion, as seen in the example, automatically opens the Outlook new message dialog and allows a user to send a fax immediately through Microsoft Outlook.

A contact can be selected from the Outlook contact manager. A message may be typed in the body of the email as it should appear on a cover page.



### Bringing “Fax Machine Features” to the Desktop with Ease

When it comes to true integration many fax servers continue to use a “store-and-forward” method for delivery. The message and delivery instructions are forwarded from the desktop to the server. At this point, the user is disconnected from the status of the message. Only after the message has been delivered (or has failed) does the user receive any feedback. Generally, a fax server sends a confirmation message back to the proprietary fax program where the user will have to remember to verify the fax was delivered. Some fax servers send a confirmation email to the user’s email inbox.

In an effort to provide the highest level of delivery assurance, an integrated fax server provides what is coined, “real-time message monitoring” (RTMM) from the desktop for users that need this type of assurance. FaxBack’s RTMM (real-time message monitoring) technology allows end-users to view the actual progress of their fax to the receiving fax device.

So, just as if standing at a fax machine, the user can actually view the receiving fax device handshake with the fax server and begin receiving pages. Thus, the real-time delivery confidence in fax delivery that has been lost with other email-to-fax implementations is retained. Users know instantly if their email-to-fax message was received, was incomplete or failed.

### Stacking Up Against the Alternatives

Truly integrated fax server solutions offers distinct advantages over less advanced offerings. The key is understanding the unique differences between fax vendors and choosing the solution that meets your IT requirements as well as your end-user’s needs. Desktop users need flexibility for the different applications they use on a daily basis as well as ease of use.

Here are a few questions to keep in mind as you explore integrating fax communications into your corporate messaging environment:

*Do you know the approximate volume of faxes your users are sending?*

*What types of documents are they sending?*

*How does your current faxing method integrate with Office applications and email programs?*

*Does it embrace the applications your users rely on?*

*Could you save time and money by implementing an “integrated” fax solution that works hand-in-hand with Microsoft Office? Will it accelerate the flow of information?*

*Are users forced to open a separate application to send faxes or can they simply File > Print > Fax from within whatever application they want to send?*

*Is the vendor able to provide an ROI to give you an idea of potential cost-savings?*

*Will the solution satisfy your power users as well as your non-technical users? Is any user training required - if so how much? How intuitive is the solution?*

*Will the fax solution fulfill your IT requirements?*

*Does the solution include automated routines to ensure you are up and faxing quickly?*

*If faxing needs change, how does the solution scale?*

*And, finally, how long has the company been in business? Does it have a solid reputation as well as customer references?*

## Summary

Despite messaging advances, FAX remains an essential business communication staple.

Twenty-first century fax solutions integrate seamlessly with Microsoft Office applications giving client applications like Word, Excel and more even greater messaging power and flexibility. With over 400 million users and more than 90% market share, it is an undisputed fact that many companies are relying on Microsoft Office to perform a multitude of tasks. Though diverse in nature, these tasks involve documents of some kind - whether they are created in Excel, Word, PowerPoint, HTML or more - they are the lifeblood of corporate communications.

Integrating FAX capabilities directly into Office and Windows-based application has a proven 90% increase in productivity over sending from a fax machine. And, while power users have always shown an eagerness to learn new business tools, most users show little patience for roadblocks that stand between them and the ability to perform their jobs. The need is stronger than ever for comprehensive, easy-to-use FAX solutions that offer simple, self-service tools for Office users. Seamless fax integration with Microsoft Office applications simplify fax service rollout across the enterprise. When users take advantage of an integrated fax server's tight integration with the applications they depend on daily, they don't need to learn a new application:

File > Print > Fax provides instant access to fax services.

For over twenty years FaxBack has been a leading fax messaging company with solutions that radically simplify the way organizations communicate. We provide award-winning network fax servers, fax-on-demand, broadcasting and web-to-fax solutions that streamline information processes, get time-sensitive information into the hands of your audience faster than ever before while reducing the cost of doing business.

Introduced in 1990, NET SatisFAXtion is an award-winning fax server with tens of thousands of fax servers installed in North America alone. Designed for organizations that need to control and simplify their fax communications, it is enjoyed by thousands of global organizations including AT&T, Arco, Bank of America, Compaq, Kaiser Permanente, Kodak, NEC, Sherwin-Williams and Wells Fargo. Countless other organizations in nearly every industry from real estate to manufacturing and travel to education and healthcare trust FaxBack and NET SatisFAXtion for their fax communications needs.

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