DEPLOYMENT GUIDE

Contents

O nce you have made the choice to make Concord FaxRX your solution for your enterprise fax needs, there are some easy-to-execute preliminary steps necessary to leverage the power of the solution to fit the needs of your business and your users. This quick guide will provide you with an overview of considerations you should make as you begin the deployment process.

The deployment process consists of 4 primary components (you may do all or just a few of these depending on your needs):

I.   Receiving Faxes with Concord FaxRX

II. Sending Faxes with Concord FaxRX

III. Faxing from MFPs and Traditional Fax Machines

IV. Automated Outbound Faxing from Applications (Production Fax)

For each of these macro components, there are individual actions that need to be addressed in order to accomplish them. Throughout the process, you will have the assistance of Concord's experienced support team; but as you'll see, the steps themselves are very simple and logical. For the purposes of this guide, we'll cover just the high level deployment process due to the many variables that any individual integration may require. However, this guide will prepare you to make the strategic decisions required to meet your specific fax needs.

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The User Experience

- **Receive faxes to email**
  You can choose to have faxes delivered to one or more email addresses (email addresses can be assigned to individuals or distribution groups).

  You'll select the file-type that you'd like to receive your faxes in: PDF, TIF or XPS. Faxes are sent to the users as a file attachment to the email addresses that you specify.

- **Automatically print received faxes**
  If you wish to receive hardcopies of the faxes that you receive (printed to a printer in your office), you simply install and configure FaxAssist on any Windows computer in your network to automatically print received faxes, for individual accounts, at specified shared printers in your network.

- **Receive faxes to a folder**
  If you'd like to receive copies of the received faxes as files dropped into a folder on your network, then you'll need to have an instance of FaxAssist installed on a computer in your network and configure FaxAssist to deliver faxes for individual accounts to a particular network folder in the filetype you prefer.

- **Receive faxes via the API**
  You are able to retrieve faxes from Concord using Concord APIs. The definition of how this is done programmatically falls outside the scope of this document, but if this functionality is of interest, please take a minute to log onto https://developer.concordfax.com to review detailed information on best practices for doing this.

Fax Numbers

You have a choice of using your existing fax numbers or provisioning new fax numbers. If you chose to retain your existing numbers, you will need to initiate a port for these numbers with Concord, by completing a Letter of Authorization (LOA) form. If you're not sure which of your current fax numbers need to be retained, we recommend porting all the numbers in order to leverage Concord FaxRX reporting capabilities to track the actual usage of each number. Because there are no long-term commitments to retain numbers on Concord – you can cancel numbers at any time. Concord can also provide you with temporary numbers for use while you're waiting for the porting process to be completed (normally 7-14 days in the USA). If you choose to, you can provision new fax numbers in any area code (or country) that you need, using the Concord Web Portal. Concord can provision these numbers for you as well.

Configure inbound user accounts

You can now assign your numbers to user accounts. The user account determines how Concord manages faxes that are received on your inbound numbers and configures items such as the email address(es) that should receive the faxes that are received.

You are able to configure users into logical groups based on departments or even informal workgroups. You can have up to 4 levels of these logical user groups so you can partition users by geography, department, workgroup or any other structure that makes your usage reporting and administration easy (e.g., internal rebilling).

The User Experience

- **Sending faxes from Email**
  Users commonly prefer an email-centric experience for faxing. They are able to simply attach files that they wish to fax to an email and send the email to faxnumber@concordsend.com. Concord then converts the files, compiles the faxes and sends the fax to the designated number. We'll send status updates back to the user via email. There is nothing to install on the users desktop, simply authorize their email address to be able to send faxes (account setup, below).

  Administrators can opt for a customized domain that can be used for sending faxes. You can also edit the notification email templates to reflect a consistent company image or include customized information relevant to the business and its users. A customized domain would mean that users could, for example, send faxes by sending emails to faxnumber@fax.yourcompany.com.

- **Print-to-Fax**
  Print-to-fax enables users to send faxes by printing documents to a Concord Fax printer queue configured on their computer. Anything that can be printed from any application can be faxed using the applications print features. Once you print the document to the Concord Fax Printer, a pop-up appears with options to address the fax, use contacts from the address book and to set coversheet options.

  Deployment of print-to-fax is simple; you should just decide how your users would install the application: you can choose to script or "push" the installer out to your users, or you can choose to have them install it manually by providing them a URL to the installer.

You can also edit the notification email templates to reflect a consistent company image or include customized information relevant to the business and its users.

Configure user accounts and notification preferences

Users need to be authorized to send faxes on your company's account. You can do this by creating accounts for users in the Concord Web Portal either individually or as a simple bulk import. Concord's Premium Support group is, as always, also happy to assist. As with receiving faxes, you can configure outbound users into logical groups based on departments or workgroups.

Concord Fax is finalizing a new Active Directory integration tool that will enable you to automatically push user adds, moves and changes into the Concord platform, enabling you to simplify your administration and drive all user account management via your current AD tools.

Each user account can utilize the default settings of the group that they belong to or can have their own individual settings. The most common configurations that you would review for a user would be their coversheet defaults (referenced below) and their notification settings. Users can be notified when their outbound fax is received by Concord and processing of their fax begins, and they can also be notified of failed and/or successful faxes.

Concord also supports Enterprise Outbound Accounts, which are essentially a domain-level shared account where everyone who does not have their own unique user account could still be authorized to send faxes using generic, shared settings. For example everyone with an email address of *@ yourcompany.com* could be authorized to send faxes. Companies commonly assign individual accounts for higher volume fax users, and then configure a generic shared Enterprise Outbound Account for the remaining users who fax only occasionally.

Coversheets

Coversheets can be added by default to all outgoing faxes for a user, can be added only when the email contains text in the body of the email (added to the notes section on the coversheet), can be added only when explicitly requested, or you can configure them to never be included.

- **Coversheet options for email users**
  Users sending faxes via email can override their default coversheet behavior by adding a token to the subject line of their email (e.g., adding "%{cover}" will add the users default coverpage, or adding %{cover:sales} will add the coversheet called "Sales" to the fax being sent).

- **Coversheet options for Print-to-Fax users**
  Users who send faxes using the Print-to-Fax client will have the option to select their fax coversheet and add optional notes when they address the fax.

Creating custom coversheets

Creation of coversheets couldn't be easier. Simply create an MS Word version and uploaded it to the Concord Web Portal, where they can then be assigned as a default coversheet to users or groups of users.

FAXING FROM MFPS AND TRADITIONAL FAX MACHINES

There are two different approaches to enabling fax from MFPs (Multi-Function Printers): Using the scan-to-email features of the device via Simple Mail Transfer Protocol (SMTP) or by using Concord FaxLync. The latter also supports connections to traditional analog fax machines.

Using Scan-to-Email features (SMTP)

If your users authenticate on the devices via logging in with a card or password, then there is nothing you need to do specifically to enable them to fax from those devices. The MFP will be treated exactly the same as any other email client that those users use. You'll just need to ensure that those users have Concord user accounts and are authorized to send faxes.

Status notifications about the sent faxes are sent to any email address you specify.

Some organizations allow all their users to utilize the MFPs without authenticating (i.e. all users have free and open access to the devices and the device has no awareness of which user is currently using the device). In this case the actual MFP becomes the user on the Concord platform. You'll need to ensure that the sending email address that the MFP uses to send the emails from is configured as an authorized Concord FaxRX user. Status notifications about the sent faxes are sent to any email address you specify, and depending on your device capabilities, that email can automatically be printed on that device (if not, notifications should be routed to a user on the network).

Using Concord FaxLync

FaxLync is a hardware device that connects analog fax devices directly to the Concord FaxRX cloud service. Analog phone lines are no longer required and the faxes travel securely over the Internet using HTTPS.

Each FaxLync device can be connected to up to 2 analog devices. The most common configuration connects FaxLync at the actual devices, but you can also choose to connect them at the telephone wiring closets in the building.

If you are using FaxLync to send faxes, the process to send a fax is the same as it's always been, with the only difference being that you need to use a prefix before the fax numbers: a "1" if sending in the USA, or to use the corresponding country code for international transmissions.

When using FaxLync to receive faxes on a MFP / Fax Machine, you'll simply port your existing number to Concord and assign it to the FaxLync device in the Concord Web Portal. Faxes will then be received on that fax device as they always have been, with the added benefit of eliminating a phone line connection.

Most commonly, our users choose to continue using their Fax Machine (and FaxLync) to send faxes, but prefer to receive faxes in email. In this case, you simply assign your existing fax number to a user account (after porting it to Concord) instead of assigning it to the FaxLync device.

AUTOMATED OUTBOUND FAXING FROM APPLICATIONS

Setting up automated outbound faxing processes from backend applications can be complex, but by following these easy steps you will simplify your project and reduce the time it takes to implement.

The most important 3 things you need to evaluate are:

- How will I get my fax jobs to Concord?

- How will I provide the delivery and addressing instructions for my job?

- What do I need in terms of notifications or status updates about my transmissions?

As a general rule, all the options for submitting faxes support a variety of configurable options for how you receive notifications: you are able to receive proactive notifications back by email, you can access the status information about a job via the API, or alternatively users can be directed to view the status of jobs in the Concord Web Portal.

Sending faxes using Email

If your application already supports sending emails, then you can typically use this same feature to send faxes via Concord FaxRX. Simply configure your application to attach the file to be faxed to a regular email message and send it to ***number@concordsend.com***. Additional information about the fax or instructions on how to send the fax can be included using tokens in the subject line of the email. You can use these tokens to capture specific information relevant to you or to this particular fax, such as the case number, patient ID or the transaction number. This information is all available in the reporting and the status notification messages that are sent.

You also have the option of configuring a user to be notified of the outcome of the faxes by setting the "reply-to" field on the outbound email, or users can access the activity reports in the Concord Web Portal to view the status of their faxes.

Sending faxes by dropping a file into a Folder

Faxing files by simply dropping the files into a folder on the network is a common method to send faxes from older systems. FolderFax will need to be installed on a Windows computer in the network and configured to monitor the folder(s) you wish to use. Addressing information and delivery instructions can be provided by either including them in the filename of the file to be faxed or they can be captured in a separate XML file dropped into the same folder as the file you wish to send.

Sending faxes by printing your jobs to a shared network Print Queue

Some updated features are pending release from Concord which will support sending faxes automatically by printing them to a shared network print queue. This capability requires the installation of a small Windows application inside your firewall to retrieve the documents from the print queue. In this model the addressing information about the fax is encapsulated in the actual file being sent. Your application would simply "print" documents to this shared network printer in Printer Command Language (PCL) protocol. Each of the documents will then include commands or tokens in the content which will provide instructions to Concord on where, when and how you would like the fax sent. Concord removes the addressing tokens from the source document and converts the remaining PCL to a faxable format.

Sending faxes programmatically using the Web Services APIs

This option provides the most feature rich integration experience. Jobs can be submitted in any supported file format, submission options can be infinitely controlled and notifications can either be sent back to the application via a Web Services "Push" or be made available for your application to "Pull". Your fax submission requests can be made via Web Services or SOAP, and can contain extended information and controls for any aspect of the transmission or subsequent notifications.

Upon submission, a unique job identifier is immediately generated (or can be supplied by you) and can be used to request real-time job delivery status information (Web Services Pull). You also have the option of sending notifications and status information back to the application via a Web Services Push (e.g. HTTP POST) interface or via email.

With Concord FaxRX you have all the features you've come to rely upon, without the overhead of acquiring, managing and maintaining your own infrastructure. When it comes to enterprise fax, you can see why Concord Fax is a trusted leader in cloud fax solutions. ◆

Extensive information about the Concord APIs are available at https://developer.concordfax.com

About Concord

Concord is the premier provider of integrated fax solutions for business. Its advanced network architecture provides near unlimited capacity, unmatched reliability and advanced security features. Concord Fax supports a comprehensive range of service offerings, including versatile Web Services that facilitate integration with any corporate software application.

Concord customers enjoy all the benefits of feature-rich fax communications without the cost, effort, and maintenance issues associated with conventional fax systems and alternative fax technologies. This is achieved by platform-independent integration of fax and email, which in turn adds value to existing IT infrastructure and maximizes return on IT investments. Our network architecture is flexible enough to accommodate internal corporate policies (features such as specific fax cover pages or file formats) or to ensure compliance with internal and external industry requirements. Concord's secure fax delivery system is fully compliant with the Gramm-Leach Bliley Act (GLB).

Leadership Through Technology

Since its inception in 1996, Concord has lead the industry with innovative solutions that push the edge of what is possible. Today, Concord is spearheading the industry with its fully redundant, SIP/T38 enabled network. Based on a pair of fully redundant data centers located in Seattle, WA and Chicago, IL, Concord provides full fax functionality even in the case of regional catastrophic events. Concord's revolutionary data center failover technology provides real-time failover for both inbound and outbound communications. The former, a product of significant capital investment, represents a technological breakthrough in the industry by enabling the rerouting of fax traffic in the blink of an eye. This results in exceptional business continuity and reliability. ◆

101 Stewart Street, Suite 1000
Seattle, Washington 98101 USA
www.concordfax.com
E-mail: sales@concordfax.com

Corporate Sales:
Toll Free: 1 888 271 0653
USA: (+1) 206 486 6955
Germany: (+49) 89 1250373530