

UC for Business - Fax Messaging



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Introduction

For many of today's businesses, fax communication is still the preferred way to send signatory documentation. NEC's UC for Business (UCB) Fax Messaging improves the access, control and security of fax communication.

Faxes can now be delivered directly to PCs, making a contact center more responsive and providing a superior level of customer service. No more hovering around the fax machine, waiting for confidential documents to print out. No more misplaced faxes or delayed deliveries.

With NEC's UC for Business Fax Messaging, faxes can be viewed in Desktop, Console or Unified Messaging (Microsoft® Exchange Outlook® or IBM Lotus® Notes®).

Overview

Unified Messaging

UCB Fax Messaging is the final component of NEC's Unified Messaging offering. Unified Messaging can be defined as an advanced message management solution that covers all media types: phone, email, voice messaging and fax. It allows access to any message from any application at any time.

Unified Messaging creates a single infrastructure for managing multimedia contacts and allows users to access their messages via whatever mechanism they prefer and when it is convenient for them.

UCB Fax Messaging provides management of fax traffic from within Console, Desktop¹ or Unified Messaging. Fax Messaging allows the traditional phone call management features and tools provided by the Messaging suite to be applied to fax media. Faxes can be viewed and printed in Console, Desktop or Microsoft Outlook®.

Paperless Fax

Many industries still rely on the paper trail of signatures. For many companies, faxes are still the preferred order-taking medium.

Tired of waiting at the fax machine for faxes to arrive – or worse still, missing them because they got caught in a pile of other work for somebody else? Fax Messaging improves the access, control and security of fax communication. Customers send signed orders and other important documents directly to the appropriate person to view and/or print the fax at the best time for them.

¹ In this document, "Desktop" represents Executive Desktop and Executive Insight

Fax Messaging is also fully integrated into UCB's comprehensive reporting package, ensuring users have a complete picture of inbound and outbound fax traffic.

Business Drivers

UCB Fax Messaging provides many advantages:

- Signatures on faxes are still the only electronic legal tender used by some organizations. Maximize sales opportunities by giving potential customers a simple way to send signed orders to immediately begin the purchase process.
- Give customers instant contact with staff, minimizing misplaced orders and delay frustrations.
- The business can now confidently expect individual ownership and management of incoming faxes.
- Integrates with existing Console, Desktop and Unified Messaging applications; there is no need to purchase additional applications.
- One solution from one vendor – the UCB suite of products covers all methods of customer contacts: phone, web chat, email, web callback and fax. The suite provides a fully-integrated solution and a lower total cost of ownership via a single communications platform.
- Reduce paper confusion and interruptions by providing staff members with the ability to view faxes on screen.
- By instantly responding to the inbound fax request, staff can maintain a fluid process that is easily tracked as required.
- It is an integrated solution for a paperless office. Centralized reporting on inbound and outbound faxes gives managers the confidence to take on a paperless form of communication.

User Benefits

Improve the flow of communication and the sharing of information within the organization. Faxes can be forwarded to colleagues and easily stored for future reference. Staff members can expect such individual advantages as:

- Privacy
- Immediacy
- Simplicity
- Notification of fax via the phone, Console, Desktop, email and Voice Messaging
- Multiple application access (Console, Desktop and Outlook®)
- Ability to forward received faxes off site via email
- Remote access via Outlook® Web Access.

Administrator Benefits

One of the many advantages of Fax Messaging is its straightforward administration:

- Simple configuration
- Centralization of multimedia communications in a single familiar administrative environment
- Intuitive GUI and context sensitive Online Help

Customer Benefits

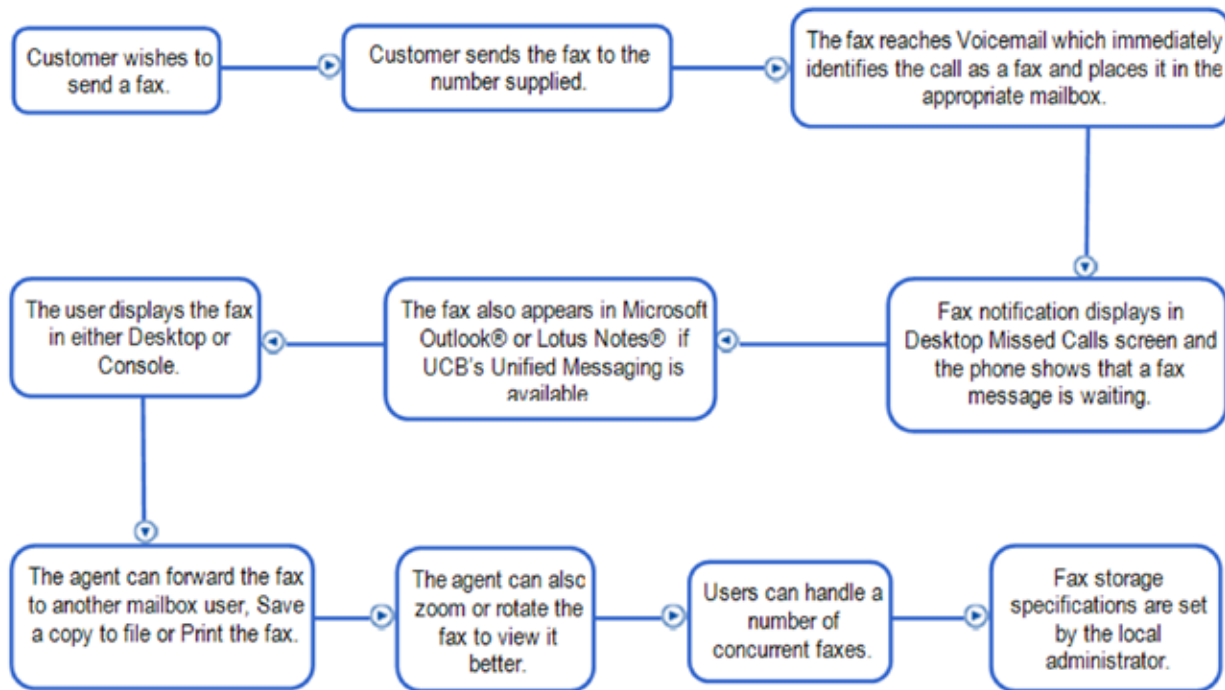
Customers are the immediate beneficiaries of an effective medium:

- Managing and retrieving fax, email and voice messages from a central application (Outlook®) instantly improves efficiency in the business.

- Customers can now guarantee their fax will arrive at the required destination in the shortest possible time and users will receive instant notification of its arrival.
- The privacy of the fax is guaranteed at the user's discretion.

The Inbound Fax Messaging Process

Here is what happens when somebody sends a fax to a Fax Messaging user...



Physical Architecture Overview

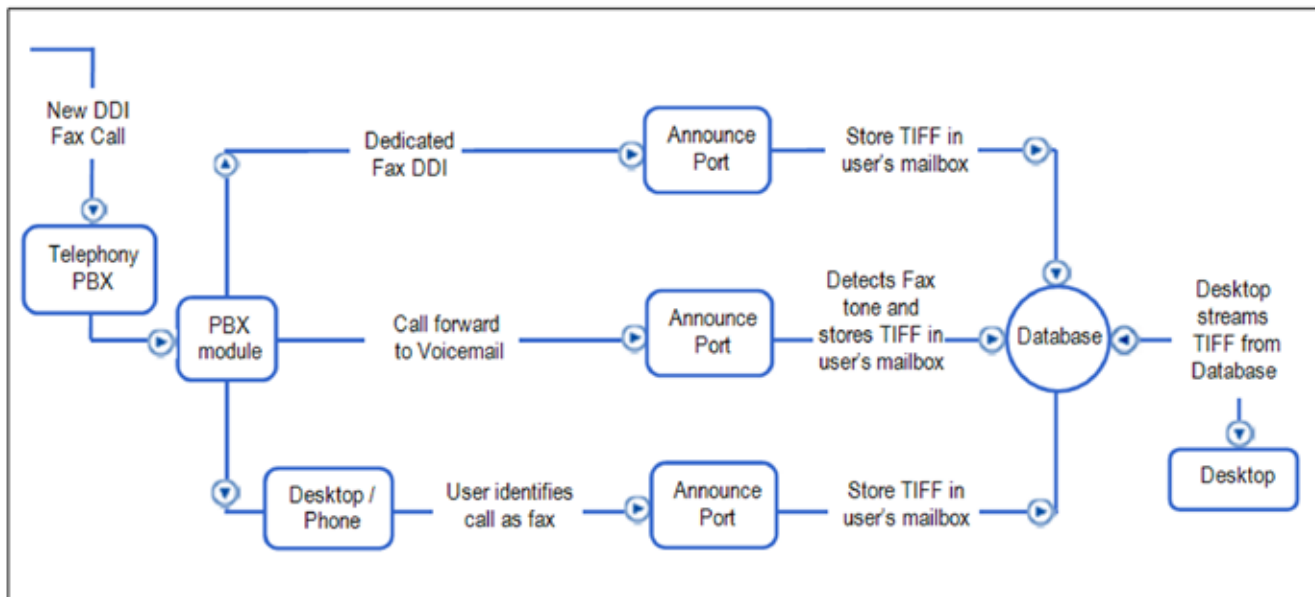


Figure 1. Physical Architecture²

How Does Fax Messaging Work?

Overview

The Fax Messaging process is very straightforward:

Faxes must be directed to Voice Messaging, which instantly identifies fax tone and processes the fax accordingly.

The fax is then stored in the appropriate Voice mailbox.

The user can view the fax as a TIFF, which can be saved, printed and forwarded as required.

Licensing

Fax Messaging requires the following licenses...

A UCB Voice Messaging mailbox is required to receive any faxes

Console, Desktop, Executive Insight or Unified Messaging is required to view and process inbound or received faxes.

Console, Desktop or Executive Insight is required to view transmission status of outbound or sent faxes.

Unified Messaging is required to view faxes in Outlook® or Lotus Notes® and forward them offsite.

² Note that the Cisco® CallManager, which uses the Router for inbound Fax, does not use Announce/voice ports.

Directing a Fax to Voice Messaging

Fax calls can reach Voice Messaging in three ways.

- **Via a dedicated fax DDI:** Directing faxes to a specific fax number is the quickest, cleanest form of fax delivery offered by Fax Messaging. Users are not required to interact with the fax call as Fax Messaging ensures the fax is automatically delivered to the user's mailbox.
- **Via a personal phone DDI:** Although not as automated as a dedicated fax DDI number, this method allows users to receive faxes on the same DDI number as their phone. When they answer the phone and hear a fax tone, they simply redirect the call to their voice mailbox using a single mouse-click in Desktop or Console. If they are away from their phone, the call forwards unanswered to Voice Messaging without any manual handling and is processed immediately.
- **Via a group fax number:** All company faxes can be directed to a single fax mailbox. The operator then views and distributes these faxes to users. The operator can either print faxes to distribute by hand or forward the fax to the mailbox of appropriate staff.

Storing a Fax in a Mailbox

As soon as Voice Messaging identifies fax tone, the fax is stored in the appropriate user's Voice mailbox. Voice Messaging uses the digits received to associate the fax with the correct user mailbox.

The dedicated DDI number sends the appropriate digits via the PBX.

The transferred or redirected personal DDI number passes digits automatically on transfer.

The group fax number is used for all users; the target person for the fax is identified by viewing or printing the fax.

Viewing a Fax

Faxes can be viewed in Desktop, Console or Executive Insight or Unified Messaging.

- **Desktop** – Like Voice messages, sent and received faxes appear in the Call History tab page or inside the Fax tab page. From the main screen, users can choose to delete, forward, print or view the fax; or they can simply double-click the record to open the Fax viewer. In the Fax viewer, the user can Print, save or view (including zoom and rotate). The Fax viewer is a separate Window that allows users to expand the window to the size of the monitor to gain maximum visuals. The viewer can also keep the window open independently of any other activity.
- **Console** – Console operators can View and Delete sent and received faxes from the main Console screen; or they can simply double-click the record to open the Fax viewer, providing the same functionality as in Desktop above.
- **Executive Insight** – Users can view sent and received faxes along with calls and voice messages inside the Calls tab page.
- **Unified Messaging** – Users can receive faxes into their Outlook® or Lotus Notes® email application, giving them full email functionality such as View, Print, Save, Forward, etc. Sent faxes are not shown.

Examples

This screen sequence shows a fax arriving in Desktop via a personal phone DDI/DID.

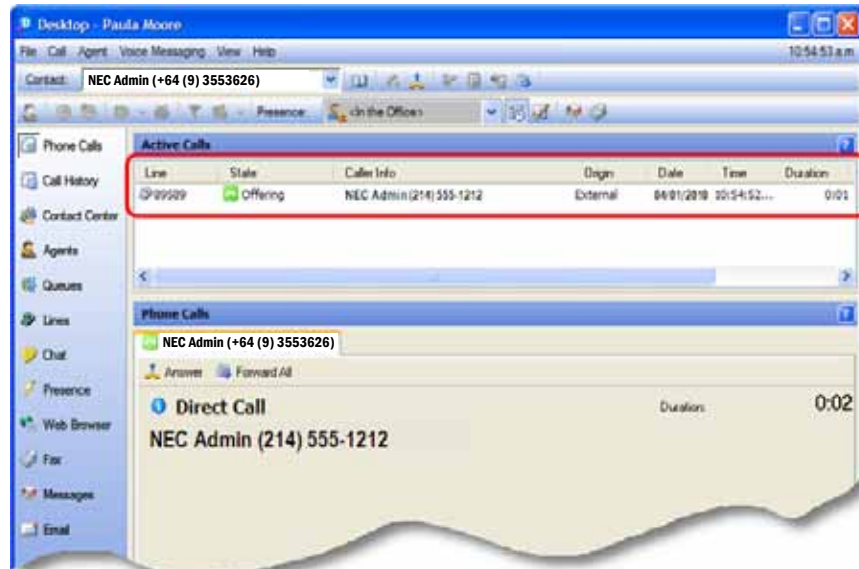


Figure 2. The first step to receiving a fax is when the phone rings. If the number is recognized, the user may know even before answering that a fax is being sent.

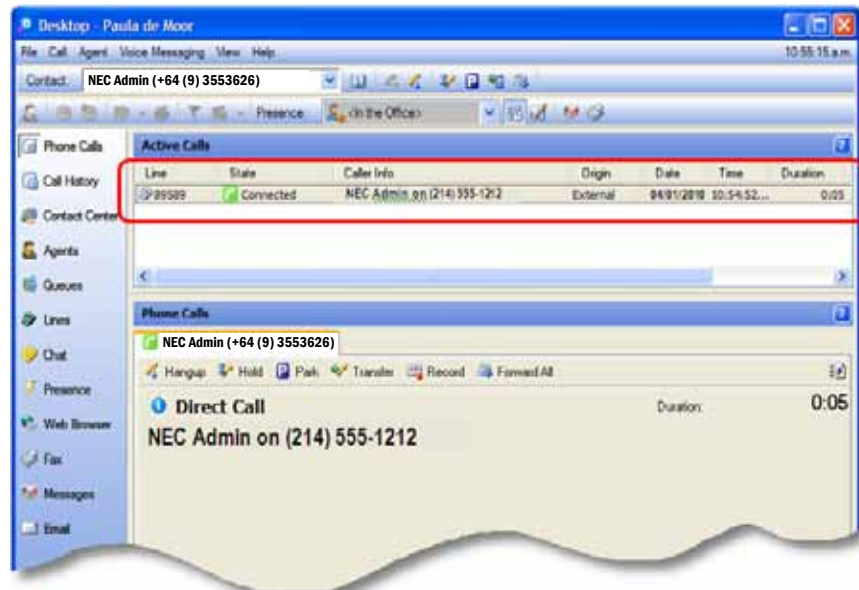


Figure 3. If the user answers the call, they will hear the tones generated by the sending fax. If the user has already identified the call as a fax, without picking up the phone, there is no need to handle the call at all, see Figure below.

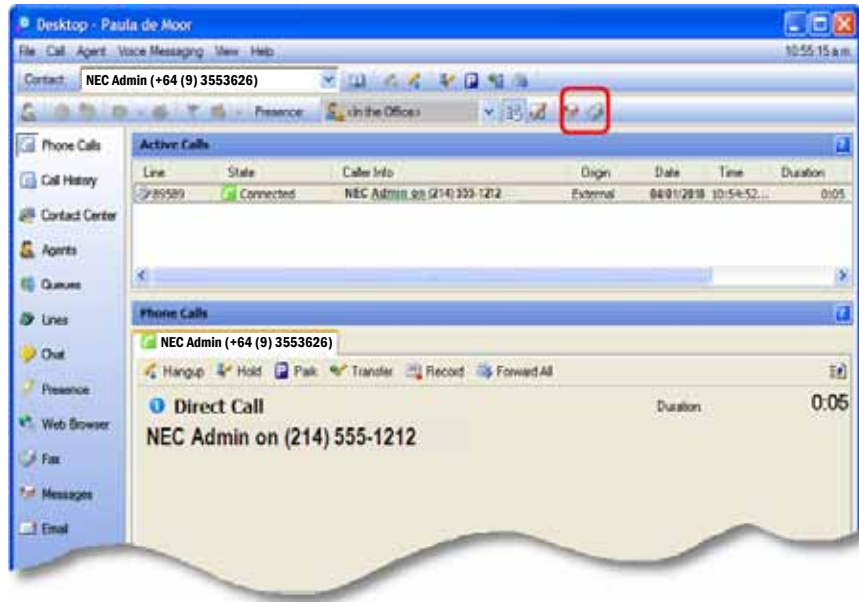


Figure 4. On answer, the user identifies fax tone and clicks the Fax button in Desktop, sending the fax immediately to Voice Messaging.

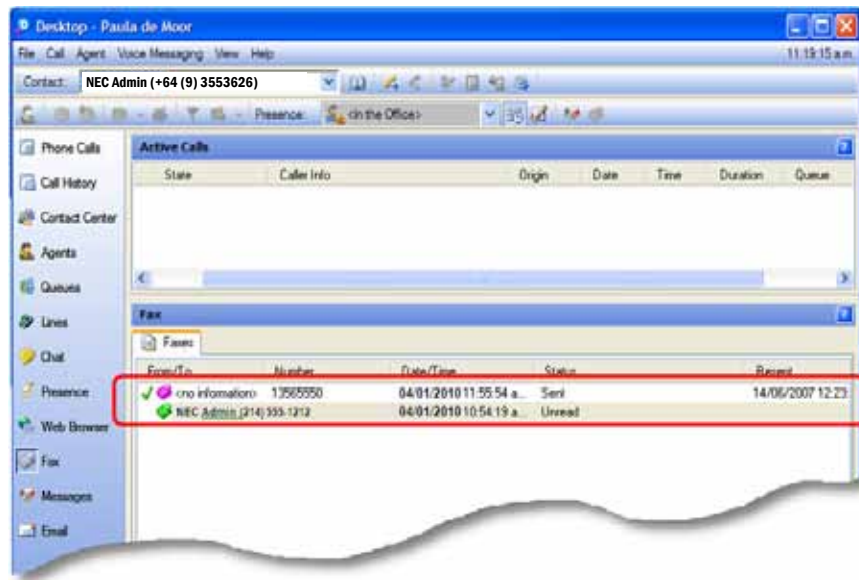


Figure 5. Fax Messaging takes a few seconds to process the fax, just like a standard fax machine. As soon as the fax is received, it is moved to the Voice Messaging mailbox and displayed in Desktop, Console and/or Outlook®.

Core Features and Benefits

Features

Fax Messaging provides the following core functionality:

Users can send and receive faxes directly from their PC.

Fax integration allows users to receive or process faxes via Console, Desktop or Unified Messaging (Outlook® or Lotus Notes®).

Phones that can display message waiting notification will also provide fax notification. NEC proprietary display telephones display detailed and specific notification of faxes.

Voice Messaging will also provide verbal notification, i.e., “You have one urgent message, two new messages and one new fax message.”

Users can print, save and forward faxes from any of the applications above.

Operators can drag and drop faxes directly from any mailbox³ (e.g., the company fax mailbox) into the appropriate destination mailbox.

Support staff can remotely view any unprocessed faxes at another extension via their Desktop or Console Presence buttons.

Users have immediate access to an introductory Fax Messaging video Tutorial on startup, as well extensive context sensitive Online Help. This assistance is instantly available at any time.

Inbound and Sent Fax information can be viewed in the relevant fax report.

UCB Administrator provides a single administration interface for configuring fax users.

The simplicity provided by Microsoft Windows® GUI and Online Help allows the local administrator to easily configure new fax users without requiring a technician to come to the site.

To allow for unpredictable peaks in inbound fax traffic, voice mailboxes can be configured to overflow faxes to a legacy fax machine when the voice ports are busy, ensuring fax delivery service is not interrupted.

Faxes are stored for the period pre-specified in the UCB Administrator for each user class.

A “safety net” or administrative backup option is available, allowing users to automatically print all faxes on arrival in the mailbox. UCB security options also allow this functionality to be controlled by the Administrator.

Benefits

Fax Messaging offers some unique benefits:

Can give customers the option of committing with a confirmed, signed order – this is not available in any medium other than hand delivery or face-to-face.

Customers can send their faxes directly to an individual, not to a group fax.

Directing faxes to users’ personal phone DDI numbers reduces the telecommunications costs incurred in dedicated fax lines and allows companies to offer fax facilities to more users.

The significant savings of eliminating paper from the equation cannot be overlooked.

Fax Messaging is easy to use for both customer and users. It saving the time and expense associated with training.

Customer service levels and sales revenues can be dramatically improved by offering the ability to send an order directly.

Consistency of fax user interface in other UCB applications allows users to handle their fax communications intuitively, improving customer service and reducing handling time.

Ability to view faxes remotely on other extensions via Presence buttons allows operators to reassign or redistribute work as required or to monitor faxes for absentees.

The module includes easy to use reporting tools, bringing fax management effectively into the paperless office.

Fax Messaging completes the single, fully integrated solution for telephone, fax and email contacts, integrated as a “single supplier” solution from UCB.

While the theory of the paperless office is very attractive to management, individuals may require the reassurance of paper copies to make the transition comfortably.

³ This functionality is controlled by Security permissions set by the system administrator

Examples

Faxes are viewable and able to be processed in Desktop, Console and Outlook®.

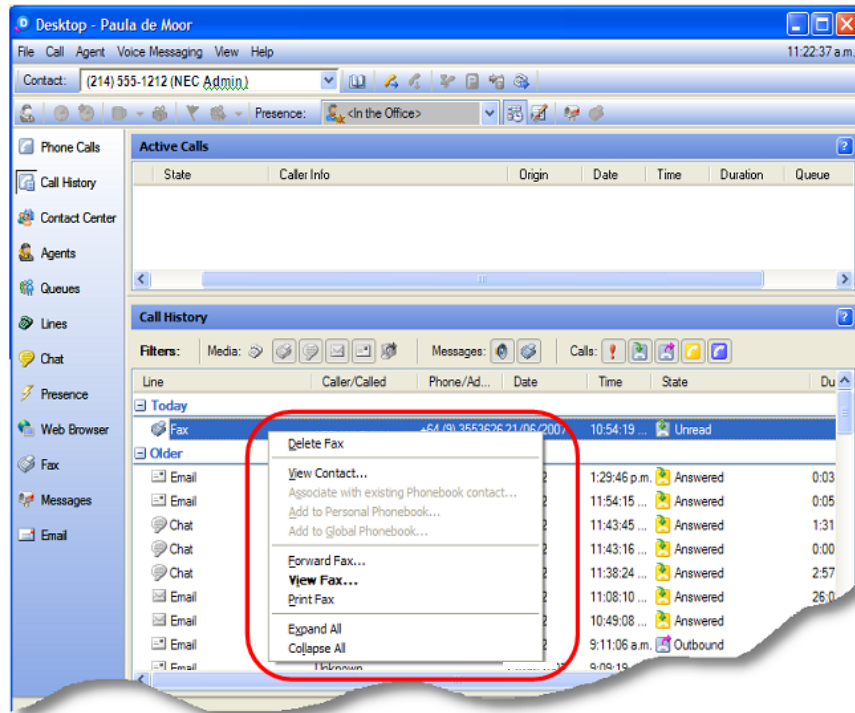


Figure 6. Right-click on the Fax in Desktop Missed calls to view immediate options

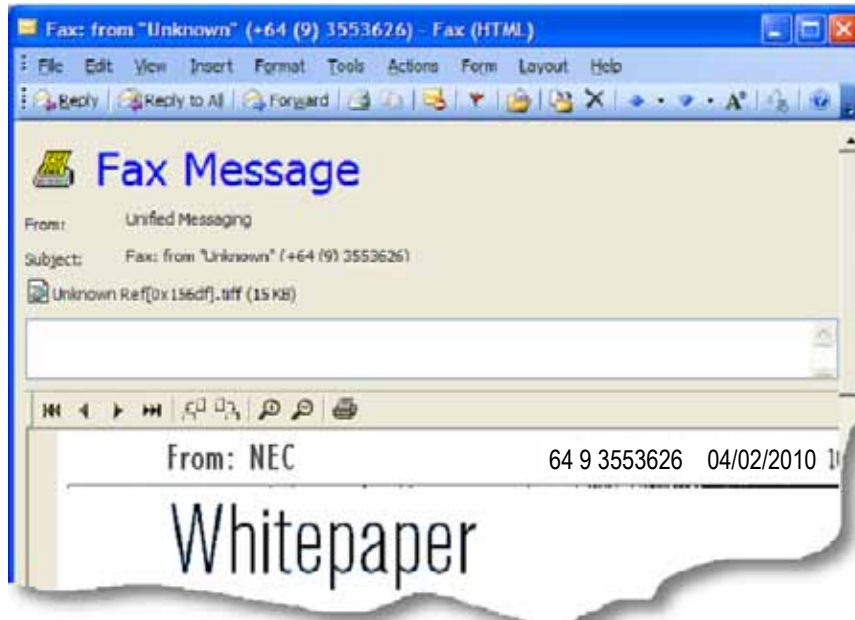


Figure 7. Open the fax item in Desktop or Console to display the fax in the independent Fax Viewer window. Here the user has the option to zoom, print, save or rotate the fax.

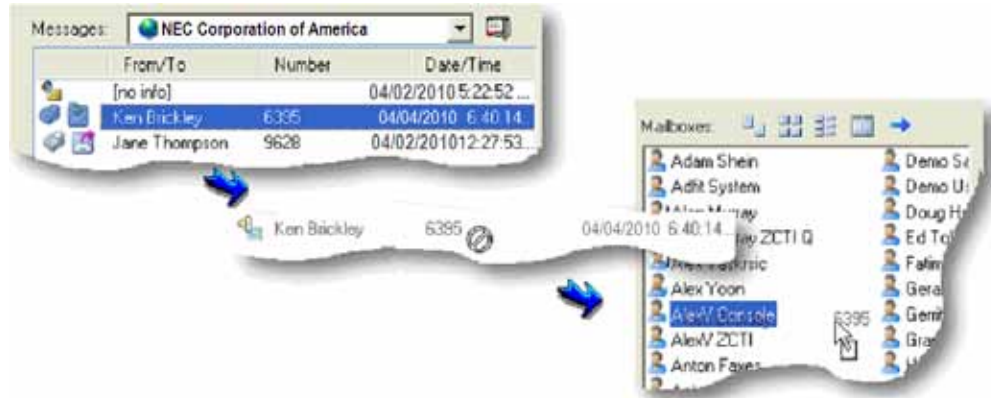


Figure 8. In Console (or Desktop) Messages view, the operator can drag and drop faxes directly into the appropriate mailbox after either viewing the fax or identifying the sender.

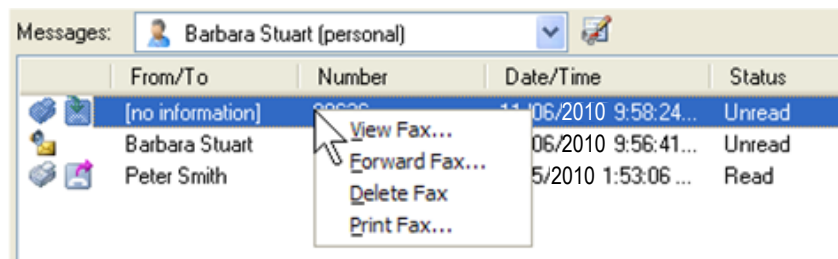


Figure 9. Console operators or permitted Desktop users can send and receive faxes, as well as view and distribute faxes for other mailbox owners. This allows operators to centrally manage enterprise fax communications without leaving their desk or requiring extra equipment.



Figure 10. Double-click on the Fax in Unified Messaging inside Outlook®...

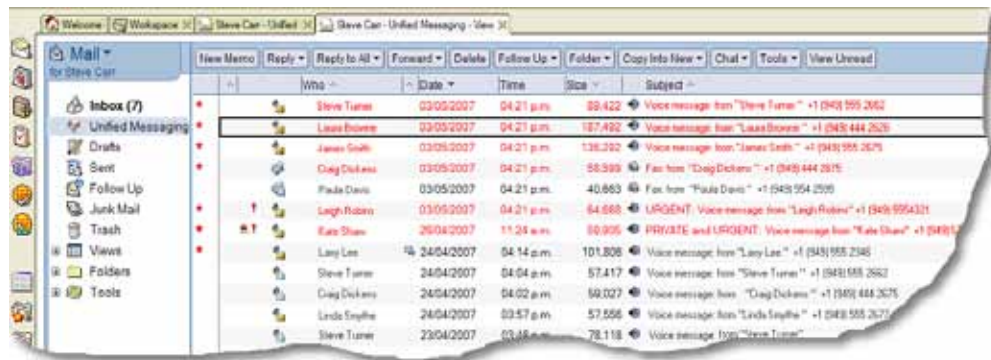


Figure 11. ... or inside Lotus Notes®

Faxes appear as TIFF attachments in Outlook®. Users can use the default Windows® viewer or install a custom UCB viewer that allows them to simply double-click the fax email in their Outlook® or Lotus Notes® inbox to display it.

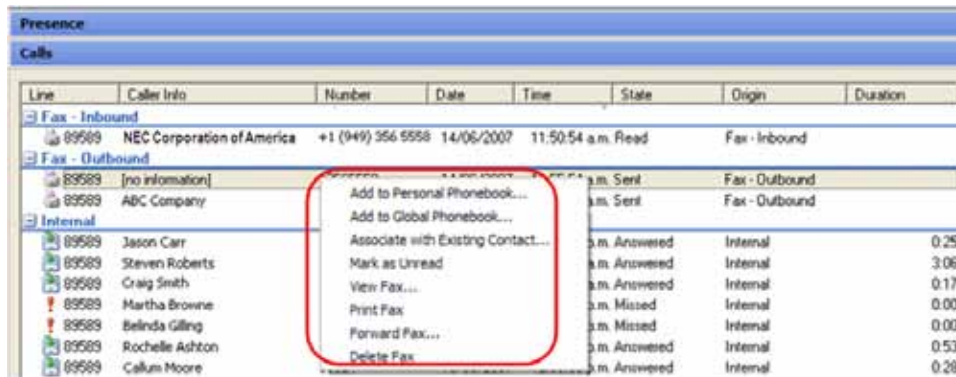


Figure 12. Faxes can be sent and received from within Outlook® using Executive Insight, providing the user also has a United Messaging license.

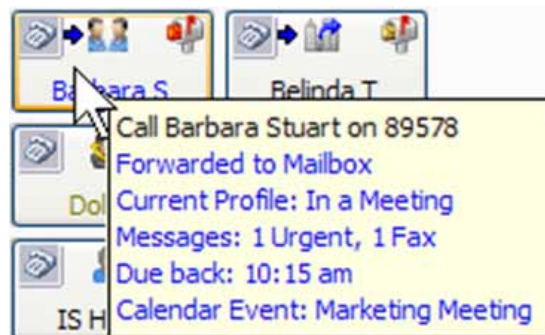


Figure 13. Fax message notification displays on Console and Desktop Presence pages. Mouse over any button to view the tooltip..

Fax Messaging “Print to Fax” (Outbound Fax)

Features

Fax Messaging allows PC users to send faxes directly from their PC:

Using Microsoft Office® Fax, PC users can send a fax simply by printing any document to the “fax printer” on their local network⁴ using the standard print option.

Windows® 2003 Server⁵ allows a fax device located on the server to be accessible as a fax/printer device from client PCs on the network.

Faxes are sent using the existing Messaging voice ports, so no additional hardware is required on the client PC.

Every Fax message sent is stored in the mailbox, so every user wanting to use Print to Fax must have a Voice Messaging mailbox configured.

Users can send to a one-off destination and fax number or access Microsoft Contacts or Global Address book from the Microsoft Fax Send Fax wizard.

The Sent Fax status is displayed in the Desktop Faxes and Recent Calls tab screens, as well as the Console Messages pane⁵, allowing Desktop and Console users to monitor the event.

Users can view a list of faxes that have been sent, including the date and time and the result (such as, ‘sent successfully,’ ‘pending retry” or ‘failed to send’).

Users can review the content of a sent fax. Double-clicking a fax listed on the Faxes tab opens a new page that displays the body of the fax.

Inbound and Sent Fax information can be viewed in the relevant fax report.

Benefits

The ability to send a fax from the PC provides greater efficiency, which inevitably results in a higher service level to customers:

Instead of waiting until a convenient moment to leave their desk and walk to the fax machine, users can hit the print button and send it immediately.

Typically, sending a fax is fraught with the frustrations caused by sharing the equipment, understanding the hardware, etc. With Fax Messaging Print to Fax the user has instant access, whenever it suits them, to the familiar Windows® technology that is used to send the fax.

Sending faxes from the PC is more time efficient than the usual three-step method of print, pick up and send fax, which often involves visiting a fax machine in another part of the office and places security at risk.

Even in a “paperless” environment, users can keep track of their own correspondence, printing and paper filing only as required.

The user’s ability to review their personal Sent Fax traffic from Desktop speeds up any troubleshooting required with incorrect fax numbers, etc., and increases efficiency.

⁴ Microsoft Windows Server 2003 is required for Fax Messaging Print to Fax

⁵ The Messages pane, used for distributing faxes, can also be made available to specified Desktop users

Examples

Print to Fax uses familiar Windows® technology to print faxes to the network Fax printer.



Figure 14. Printing to the Fax Printer initiates the Windows® Send Fax Wizard and users simply follow the steps through to Finish to send the fax.

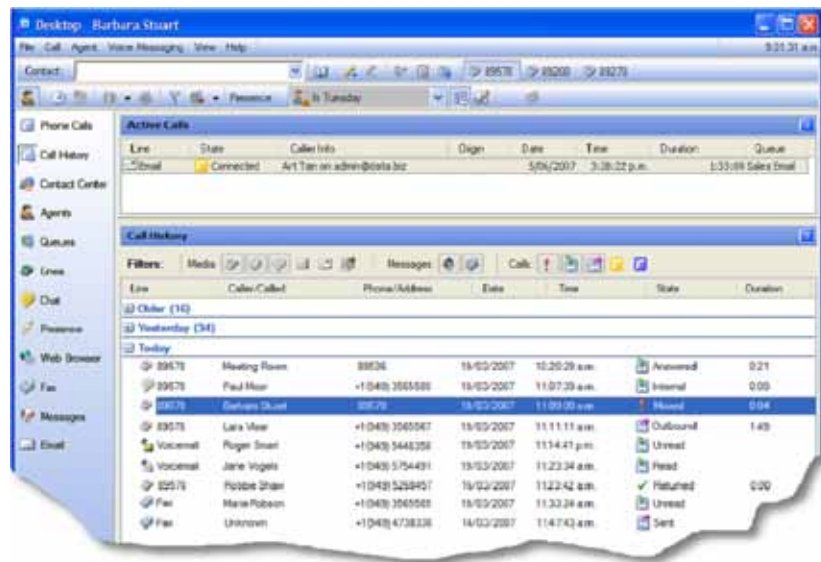


Figure 15. Sent Fax in Recent Calls view fax transmission information, such as the date, the time and the number to which the fax was sent. Double-click the fax record to open or display the fax TIFF.

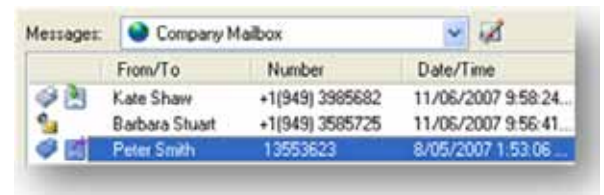


Figure 16. Sent and received faxes in Console/Desktop Messages Pane

Reports

Features

Reports for Fax Messaging traffic are accessed from the standard UCB Reports package.

Standard reports used for Fax Messaging are...

- **Voice Messaging Mailbox Usage Report** - Reviews fax use and access history for all voice/fax mailboxes. This can provide a daily summary of voice mail/fax traffic for the entire system.
- **System Voice Port Usage Report** - Breaks down how the voice ports are being used. This provides a detailed record of how the voice ports were used and the types of calls and actions associated.

Specific Fax reports used for Fax Messaging are:

- **Inbound Fax Messaging** – Provides details on Fax Messaging faxes received in user mailboxes.

- **Fax Destination** – Provides information on faxes sent or received from particular customers or fax numbers. The report can be limited by Phonebook contact or CLI to identify the volume of faxes sent or received from a specific contact.
- **Outbound Fax Messaging** – Provides information on outbound faxes using Fax Messaging Print to Fax option.

Benefits

The Reports application provides managers with the flexibility to report on faxes side-by-side with other media, as well as enabling them to identify fax activity specifically.

Fax reports can be used for trouble shooting, e.g., identifying missing faxes.

The site administrator can use the fax reports to review and address voice port load.

Managers can also review potential work load issues based on fax traffic reports.

Example

Managers run fax reports from the standard Reports application, controlled by standard Messaging security settings.

- 1 Number of fax pages received into the user's mailbox
- 2 The CLI details of the contact sending the fax, if available
- 3 The name of the contact (provided CLI is available and matches a Phonebook contact)

Inbound Fax Messaging Report
For Ms [Barbara Taylor] (9579) ...
For the period (1/05/2007 - 31/05/2007), (0:00:00-23:59:59), Detail 'All Details'

| Date | Time | Pages | CLI | Caller | Company |
|----------------------------|----------|-------|-------------------|---------------|----------------------------|
| 9579 Barbara Taylor | | | | | |
| 3/05/2007 | 7:32:41 | 1 | +1 (949) 544 3600 | Joe Robinson | ABC Company |
| 9/05/2007 | 11:00:36 | 1 | +1 (949) 622 3600 | Mary Davies | NEC Corporation of America |
| 14/05/2007 | 11:34:13 | 1 | +1 (949) 522 2771 | Martin Browne | Mentor Co |
| 14/05/2007 | 17:56:56 | 1 | +61 (2) 7222 8020 | Calun Smythe | NEC Japan |
| 14/05/2007 | 18:02:50 | 1 | +1 (949) 355 3600 | Laura Pond | NEC Corporation of America |
| 15/05/2007 | 13:08:01 | 3 | +1 (949) 300 2220 | Alex Dalton | Fax Mail Co |
| 18/05/2007 | 4:21:48 | 1 | +1 (949) 478 7800 | Kate Shaw | |
| 19/05/2007 | 11:05:23 | 1 | | | |

Figure 17. Inbound Fax Report

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