opentext™

Success story

Symcor

Industry
• Financial Services

Solution
• OpenText™ RightFax™

Partner Support
• Process Fusion Inc.

Results

🖥️ Customers benefit from a **stable, resilient and secure environment**

💲 **Reduced costs** by centralizing on a single fax solution

🧩 **Met customer requirements** by integrating with business applications

📠 **FoIP solution** leveraged IT network resources with more than $100,000 savings per year

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Leading financial services provider Symcor banks on OpenText RightFax

Symcor achieves savings and security with a fax server solution from OpenText

"We collapsed all of those multiple fax technologies into RightFax to save approximately $8,000 dollars per month related to support, maintenance, care and feeding of all of those platforms. So now we have a single fax solution through RightFax. There is no other fax product here at Symcor."

Ted Neal
Senior Manager, Windows Servers
Symcor

Symcor is one of Canada's leading financial processing services providers, supporting major banks as well as retail and telecommunications companies across Canada. With over 3000 employees in offices and operational facilities from Vancouver to Halifax, Symcor provides cost-effective outsourcing solutions for financial processing, including a diverse portfolio of integrated solutions in item processing, statement processing and production, and cash management services.

Challenges

With tough new standards for privacy, security and accountability, organizations in the financial services industry must deal with increasing challenges relating to information security and compliance and their impact on cost control and profitability. As a provider of transaction processing services to Canada's major banks, Toronto-based Symcor faced these very challenges as it updated its fax technology.

Despite dramatic shifts in communication technology in recent years, fax has remained a core method of document delivery at Symcor and at companies around the world. The reason is simple—fax provides organizations with a secure, compliant, auditable and reliable way to exchange business critical information.

Security, resiliency and cost control were top of mind when Symcor, supported by partner Process Fusion Inc., began its journey with a single deployment of OpenText™ RightFax™ back in 2006. These goals have continued to drive the evolution of Symcor's fax solution strategy in the years since, as it has faced the continuing need to reduce costs and boost security while centralizing and integrating its fax technology.

Solution

First steps with RightFax

Symcor manages the capture and processing of check information at six major processing sites across Canada; if a check is flagged as an exception because of non-sufficient funds (NSF), it is routed through Symcor's Exceptions Express process. A notification is sent by fax to the relevant branch so that they can address the exception with that financial institution. Symcor's agreements require that the tens of thousands of exceptions be faxed out to the regions by 10:00 am, with work beginning at 5:00 pm

Symcor needed to streamline the exceptions delivery process and eliminate error-prone, inefficient routines that could breach security and privacy requirements. In 2006, Symcor selected RightFax for its Exceptions Express faxing. RightFax, the market-leading network fax server solution, is an on-premises or hybrid enterprise fax solution that automates time-intensive, paper-driven processes by integrating them with business applications and systems to maximize productivity, reduce risk and decrease costs. In particular, RightFax provides financial services organizations with a secure method for sending and receiving confidential documents—a centralized financial document delivery hub that supports regulatory compliance.

senior manager, windows servers, at Symcor explained, *"OpenText RightFax helped us centralize the thousands of faxes we generate in a given day to the regions. We were able to meet all of the SLAs required by the business—tight deadlines with very high outbound fax volumes."*

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Replacing multiple fax technologies

While RightFax was a success with Exceptions Express, Symcor still used a variety of other fax technologies throughout the organization. Neal and his team were given a mandate to reduce the expense of maintaining many different platforms and applications by deploying a single enterprise solution that could support all services across all the lines of business. Neal explained, *"The company was concerned that the financial investment to keep all of these technologies alive was high. Most of them don't have high availability or disaster recovery. Well, I had just finished deploying Exceptions Express and it was very successful…So here we have what we believed was the enterprise solution for fax at Symcor and that was OpenText RightFax."*

Symcor began replacing its other fax applications with RightFax. By using the T1 and ISDN telephone/data lines that had been deployed for RightFax and turning off all the other communication lines and technology, Symcor started seeing an immediate return on investment—saving on support and maintenance costs and giving customers a much higher level of service with high availability and disaster recovery—capabilities that they did not have with the previous systems.

The many applications that were migrated to RightFax included Symcor's processes for "Inbound Returns," when items have to be returned to the banks, and "Adjustments," where banks send data to Symcor via a request mechanism when adjustments need to be made to clients' files. Neal added, *"We are not always sending data out to the financial institutions. We are also receiving requests on behalf of the financial institutions and those actually come through RightFax as well."*

Banking on RightFax as the enterprise solution for Symcor, Neal summed up the move: *"We collapsed all of those multiple fax technologies into RightFax to save approximately CAD$8,000 per month*

related to support, maintenance, care and feeding of all of those platforms. So now we have a single fax solution through RightFax. There is no other fax product here at Symcor."

A complete network fax solution for a Cisco® environment

As time went on, Neal and his team began looking for additional ways to cut costs. In discussions with partner Process Fusion, the idea of Fax over IP came up and with it the potential for huge savings. Fax over IP (FoIP) complements and leverages an existing Voice over IP (VoIP) network and eliminates the need for traditional fax boards. FoIP delivers all the advantages, reliability, and security of a traditional fax server solution, but with added benefits, such as server consolidation through virtualization and a unified communications strategy that's inclusive of fax.

"We started digging a little bit deeper into what FoIP might look like and how it worked, and we quickly realized we had some synergies— Process Fusion had experience with Cisco and we use Cisco on both the voice and data fronts. So it looked like it might be a really simple move for us to do Fax over IP on the voice platform," Neal explained.

The team realized that there were enormous amounts of bandwidth on the voice network side, with many communication lines in play during the day for employees at Symcor—but most of it was completely untapped in the evening. They foresaw huge long-distance savings by using the T1s and ISDN circuits that were set up in Cisco for voice services and channeling the FoIP services over that voice network to all of the regional offices— with no long-distance charges.

It was a simple plan—to reuse technology that was dormant in the evening when most employees went home. The Symcor voice and data teams along with Process Fusion began analysis to ensure there was available capacity on the voice network in the evening. They soon

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determined that they could easily take all of the volume and move it on to the existing Cisco infrastructure (Cisco Unified Communications Manager v. 7.1) and almost completely remove the T1s and ISDN lines from their infrastructure.

Neal described the opportunity: *"The long-distance savings alone were attractive. If we could reduce our long-distance charges, and on top of that reduce the communication lines that we had deployed for the RightFax solution, which in 2010 were in the neighborhood of 10 T1s plus a few ISDN lines, we could also reduce our ongoing T1 charges."*

Migrating to Fax over IP

In mid-2012, the six-month FoIP/Cisco integration project began. Process Fusion assisted in the migration of the current RightFax deployment over to FoIP; building architecture, configuring Cisco devices with RightFax and working with the network voice/data team, Windows Server team and application testing groups. The team decommissioned six of the 10 T1 links and took the ISDN lines and configured those into the Cisco environment. Support for the communication lines was moved from the Windows server team to the network data/voice teams.

Fax over IP benefits

The FoIP/Cisco project was an immediate success—leveraging the existing VoIP network and resources resulted in numerous benefits:

Reduced telephony and other costs

Symcor estimates savings of well over $100,000 annually from the RightFax integration with Cisco due to the reduction of T1 line costs as well as costs associated with SQL, channel licenses, and hardware on the server side. *"We reduced many of the Microsoft® OS licenses that were there. We also collapsed our Microsoft SQL Server® back-end."* Neal explains that when these savings were presented to upper management, *"They were pleased to find out we were saving that kind of money."*

Lowered hardware costs through virtualization

Moving to FoIP eliminated the need for traditional fax boards. *"We had a reliance on BrookTrout® fax boards that were part of the solution. Once we migrated to Fax over IP, we also virtualized the entire RightFax environment on Microsoft Hyper-V®, which we did at the same time that we deployed FoIP,"* Neal explained.

Neal estimates additional savings of close to $300,000 every three to five years because he has less server technology to refresh every few years. For example, he no longer has to replace all the physical fax board technology—12 fax boards at roughly $24,000 each.

Simplified IT administration

In addition, by reducing the footprint of the number of servers deployed for the solution, Neal saw a reduction in the burden on his team of administrating Windows® servers, patching, etc.

Enhanced availability and disaster recovery

The team also gained high availability and disaster recovery capabilities necessary for their outgoing fax needs, by virtualizing the environment with Microsoft Hyper-V. *"We have got some very resilient infrastructure now that we've converted to virtual,"* said Neal.

Additional benefits

Stability and ease of integration

When reviewing Symcor's history and experience with RightFax across the enterprise, Neal counts the stability of the technology as one of the key benefits of the product. *"We have had an incredibly stable environment. We rarely open up service tickets. I don't even know if I could count them on one hand… We have an incredibly stable and high-performance solution that all of our clients have been ecstatic about."*

"It has been an excellent success story since we started using the OpenText RightFax solution. We have had very few issues and we have had happy customers for a very, very long time. This is one of the most stable technologies I have ever run or ever had to manage."

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Another leading enterprise-wide benefit of the technology for Symcor has been the ease of integration that RightFax offers via its open APIs. This has allowed Symcor to integrate faxing with many of its commercial, financial institution applications. *"That is really one of the giant selling points for us… If we were not able to integrate to RightFax as deeply as we have, we would not have been able to provide additional service offerings to our clients. We have done a ton of integration,"* said Neal. Among the many integrations were a SharePoint® Failed-Fax portal, mainframe integration to split reports and send via fax, and a Secure Fax Portal to manage outbound numbers. The latter requires all faxes sent from the Xerox MFPs to be validated by Fax Security Manager (an application developed by Process Fusion for RightFax) to ensure that no fax is sent to a number that is not pre-approved by the business.

Neal added, *"My department is responsible for RightFax, but this is one very small piece of what we do. It just so happens that it is an important piece from an organizational view. They couldn't live without it at this point and they can't live without a service offering that isn't highly resilient, reliable, and robust… This is a really good thing for us."*

Lessons learned

Looking back over Symcor's RightFax implementations, Neal admits that they wouldn't do anything differently. *"I don't think we had any bad experiences. I don't know if we could have done things any better than what we did."* The key, he says, was working with the right technology and the right partner. Lacking the in-house expertise in fax, Symcor enlisted Process Fusion to assist in upgrades and integration projects requiring fax services. *"If I didn't have somebody like Process Fusion in my corner, we probably would never have been as successful as*

we were." Process Fusion began supporting Symcor with RightFax back in 2006 and according to Neal, *"They have been leaders in helping us deliver an exceptional service to the business, right from architecture all the way through to implementation and beyond."*

Future plans

In early 2014, Symcor plans to upgrade to the latest release of RightFax. In addition, Symcor has a few remaining platforms and services that are looking at integrating with RightFax.

Neal sums up his view of the OpenText RightFax solution, *"It has been an excellent success story since we started using the RightFax solution. We have had very few issues and we have had happy customers for a very, very long time. This is one of the most stable technologies I have ever run or ever had to manage."*

About Process Fusion Inc.

Process Fusion Inc. has been selling the RightFax products in Canada since 1996. As a Systems Integrator with a strong team of business and technical professionals, we have been deploying RightFax, Data Capture (OCR/ICR/IDR/OMR) and Enterprise Content Management (ECM) solutions to automate and improve business processes for our valuable customers.

processfusion.ca

ProcessFusionInc.

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit opentext.com.

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