



## CASE STUDY

# Sun Life Financial Becomes a Paperless Office with RightFax and FileNet

## COMPANY BACKGROUND

Sun Life Financial ([www.sunlife.com](http://www.sunlife.com)) is a leading international financial services organization providing a diverse range of wealth accumulation and protection products and services to individuals and corporate customers.

Tracing its roots back to 1865, Sun Life Financial and its partners today have operations in key markets worldwide, including Canada, the United States, the United Kingdom, Hong Kong, the Philippines, Japan, Indonesia, India, China and Bermuda. The company has a vision focused on providing world-class innovative financial solutions that create and maintain shareholder worth.

Sun Life Financial Inc. trades on the Toronto (TSX), New York (NYSE) and Philippine (PSE) stock exchanges.

## THE CHALLENGE

Sun Life Financial's business requires employees to work with critical documents related to the financial condition of their customers. Faxing is an essential form of communication for Sun Life Financial employees—customers regularly fax stock trades and mutual fund orders to Sun Life Financial, as well as a variety of other important information.

Five years ago, Sun Life Financial was a paper-tied company. Much of the documentation employees worked with were faxed in and out on manual fax machines. This process compromised employee productivity time by requiring employees to manually scan faxes in order to save them in the company's imaging system (a system designed to store, manage and retrieve documents).

Following the values the company has set for itself—integrity, customer focus, excellence and adding value—the company set out to ensure productivity was as high as possible.

The Sun Life Financial initiative to become a paperless office meant finding a better way to manage faxed documents.

## THE SOLUTION

Sun Life Financial realized the power of e-document delivery that brings incoming faxes into a computer (instead of a paper based fax machine) and allows outgoing faxes to be sent from the computer as well. However, the company found its original choice was only a point solution—Sun Life Financial required a more robust product that would leverage other applications and allow for document management. A search was started to find technology better suited to its e-document delivery needs.

"Our research showed RightFax to be the market leader in fax server and e-document delivery technology," stated Sam Aidonidis, Systems Developer at Sun Life Financial. The company has been using RightFax technology for approximately five years and its installation has grown from one RightFax fax server to five servers in all: two RightFax Business Servers and three RightFax Enterprise Servers.

On top of its RightFax servers, Sun Life Financial added the RightFax Connector for FileNet, which integrates RightFax capabilities with FileNet Image Services from FileNet Corporation. FileNet Image Services is a high-volume digital image server for storing, retrieving, and managing transactional content and objects of all types.

With the RightFax Connector for FileNet, Sun Life Financial has created an efficient and intelligent channel for storing and accessing the extremely high volumes of business-critical content transmitted via fax. "Maintaining a fluid workflow was very important to us," said John Sweeney, Information Services Specialist and the team lead on the RightFax/FileNet integration at Sun Life Financial.

"The RightFax Connector for FileNet routes inbound faxes directly from a queue into our FileNet Imaging system for distribution and archival. It was a huge step in accomplishing our goal of becoming a paperless office."

The RightFax server functions as an intelligent, high-volume, fault-tolerant, scalable information exchange server to extend the FileNet Image Services system. Key data points can be captured from inbound fax content so that the electronic document can be indexed and automatically routed. The process provides an added layer of security and data loss prevention as well. All FileNet-supported annotations remain intact when an outbound document is sent through the RightFax server. RightFax is able to automatically distribute outbound documents as faxes to multiple destinations.

Additionally, making sure documents could be tracked from beginning to end was one of the reasons Aidonidis chose to integrate RightFax with the company's FileNet system. "From a business standpoint, things need to be done in a certain amount of time or it could be a loss to our company and our customers. RightFax and FileNet help us make sure work is being done quickly and ensures we don't lose revenue or clients because of an inability to track work."

In the early stages of the RightFax/FileNet integration, employees were skeptical that a technology solution could keep track of the crucial documents. They initiated a reporting system to make sure received faxes were routed to the imaging software.

The report initially ran daily, then weekly, and now is run only sporadically. "If our end-users don't get a sense of reliability and predictability with the server/services we deliver, it will not be successfully integrated into a production environment," said Sweeney. "It speaks volumes about RightFax and FileNet that our business units—which need information in a timely manner—feel so comfortable with the technology they don't need to track it any more."

## THE RESULTS

Aside from the RightFax/FileNet integration—which supports approximately 16 inbound and eight outbound lines—Sun Life Financial also utilizes the RightFax Gateway for Lotus Notes. "Employee productivity spikes even higher faxing directly from Notes," said Aidonidis. About 450 employees fax to and from their Notes Inbox and the implementation of RightFax technology has allowed Aidonidis's group to eliminate 45 fax machines. "People are creatures of habit," he says. "But, once they realized the convenience of faxing from Notes, they don't want to give it up. Now our employees can't live without RightFax, and my team is continually looking for new ways to integrate the product. The further we can integrate it into our business, the more return-on-investment we'll see."

Using RightFax, both from the desktop and with the FileNet Image Services, Aidonidis and Sweeney have seen a surge in the number of faxes their company sends and receives. In the first year of using RightFax, the company has sent over 819,000 fax pages and received more than 996,000.

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*"Captaris and RightFax align well with our company values: The company is good to work with, the products are customer-focused and add value," said Aidonidis. "Our decision to install RightFax products has proven to be a good one."*

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## FOR MORE INFORMATION

Captaris Business Information Delivery solutions help organizations of all sizes automate the information and document flow throughout the information lifecycle (capture, process, archive, deliver). With a comprehensive suite of software and services, Captaris helps organizations to grow revenues and increase profits while meeting compliance goals. Through a global distribution network of leading enterprise technology partners, Captaris has installed more than 90,000 systems in 95 countries in companies of all sizes, including the entire Fortune 100. For more information, visit [www.captaris.com](http://www.captaris.com) or call 1.800.443.0806.

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