



Bank Of Oklahoma and RightFax

BACKGROUND

Bank of Oklahoma (BOK) Financial Corporation is a multi-bank holding company based in Tulsa, OK, with offices in Arkansas, Kansas, Missouri, New Mexico and Texas. Assets of the organization total \$8.0 billion.

BOK Financial's trust company subsidiaries are responsible for \$15 billion in assets. TransFund, the company's electronic funds transfer network, has nearly 1000 machines installed in an eight-state area and services more than 250 financial institutions and one million cardholders. BOK Financial's mortgage companies have offices in five states, with a total portfolio of \$7.1 billion.

THE CHALLENGE

To contact customers across six states, BOK needed a reliable and secure communications medium, and found fax best suited its needs. Prior to installing RightFax® network fax server software, BOK employees relied on a combination of fax machines and modems to send critical, and confidential, information to clients.

Billy Wilson, a BOK network specialist, knew that the financial institution's current fax situation was not satisfactory and needed attention to meet his expectations. "In my eyes, we needed a faxing technology that would fit six criteria," said Wilson. "First and foremost, it had to be secure: Because the materials we fax deal with personal and business finances, security was my primary concern." Wilson was also looking for a fax solution that permitted centralized administration and

saved employees time, which would encourage higher productivity. The solution had to be reliable, work with a variety of applications and operating systems, must meet Y2K compliance, and had to automate scheduled faxing. In addition, the installation had to fit a certain financial model.

The fax machines and modems in place didn't meet any of the six criteria. "The modems created a potential security issue that I wasn't willing to risk," said Wilson. Additionally, Wilson and others in his department spent considerable time servicing fax machines and individual computer modems at the bank's various locations. BOK employees found themselves standing at fax machines waiting to send a fax, or trying to re-send a fax when the original transmission didn't go through. Lastly, the cost of paper, toner and other supplies, as well as the expense of adding more phone lines for modems, was expanding far beyond a reasonable limit.

THE SOLUTION

To solve the faxing issues at BOK, Wilson researched numerous solutions. He found fax server technology would best fit his organization's needs.

Wilson became acquainted with RightFax at a tradeshow in Tulsa. "RightFax was willing to let me test the product so I could make my decision," he said. "In effect, the company told me to throw everything I had at the product, which, they were sure, it could handle." Because of RightFax's flexibility and superior features, Wilson ruled out competitive products and purchased RightFax.

Wilson installed one RightFax fax server to send and receive customer documents for loan applications. But since BOK also does a high volume of inter-company faxing — forwarding loan applications between sites and to different departments for processing —Wilson almost immediately decided to take advantage of local- and wide-area networks for inter-company faxing between BOK colleagues.

With continued use of RightFax, Wilson was able to confirm his product test results — RightFax met or exceeded all six of his criteria.

Wilson opted to use direct inward dial (DID) routing, which ensured a secure environment for the company's confidential faxes. RightFax offered centralized management of multiple fax servers as the RightFax installation grew. Centralized management significantly reduced the time dedicated to fax maintenance, leaving Wilson and his team to spend time in other business areas. Users were able to send and receive faxes directly from their desktops, saving time and increasing their productivity. The RightFax installation also met the financial model Wilson had submitted for approval to senior management. BOK realized a return on its RightFax investment immediately. "The return on the RightFax software was immediate," Wilson said. "More productive employees. Less stress. We noticed that the time it took to fax a document was cut in half. Faxing was no longer a major job."

Wilson believes that all RightFax components have one thing in common: time. "Time is money, and in today's competitive climate, time can make or break a corporation," he said. "RightFax gives us an edge in this competitive environment."

THE RESULTS

Since installing its first RightFax server in December 1997, BOK has added to its RightFax network and now operates five servers in four locations. Approximately 500 users currently enjoy the benefits of RightFax products and have found them to be a mission-critical component of their daily work. "I've never seen users take to an application

like our users have with RightFax," said Wilson. "Once users have RightFax, they wouldn't think of giving it up."

BOK is currently using RightFax Enterprise v6.0, and Wilson has taken a liking to the enhanced administrative tools the product offers. "The RightFax Enterprise Fax Manager (EFM) is an outstanding management tool that lets me monitor all our fax servers from one screen," he said. EFM also lets Wilson verify the server is running properly, drag and drop users between servers and confirm that his GammaLink® fax boards are properly functioning.

Through several product upgrades Wilson has continually been pleased with the stability of RightFax products. "I'm very impressed that RightFax improves its software with each version and has maintained the solid foundation the company is known for," said Wilson. "RightFax has a proven track record and is the type of application any company can count on to handle mission-critical

FOR MORE INFORMATION

Captaris is a leading provider of business information delivery solutions that integrate and automate the flow of messages, data and documents. Captaris produces a suite of proven products and services, in partnership with leading enterprise software companies, delivered through a global distribution network. Captaris has over 100,000 systems installed worldwide, with more than 90 of the Fortune 100 using the company's award-winning products and services to reduce costs and increase the performance of critical business information investments. For more information please contact us at: www.Captaris.com or 1.888.320.7778. Outside of the U.S. please call +1.520.320.7000.