



# 10 Key Considerations for Selecting a Cloud-Based Fax Solution

Digital, cloud-based enterprise fax solutions deliver compelling benefits and business advantages, but not all solutions are created equal. Here's what you need to know.

At first glance, the terms *business modernization* and *faxing* may not logically belong together. However, more and more business and IT leaders understand that cloud-based fax is not only still relevant but also a growing phenomenon.

Today's fax market action isn't in the traditional realm of paper-based facsimile machines and dedicated phone lines. Instead, the same protocols and security characteristics of yesterday's faxing have migrated to on-premises and cloud-based digital solutions, which eliminate a long list of fax shortcomings.

Indeed, three-quarters of the IT decision-makers who participated in a 2019 survey by IDG and OpenText reported that their fax volumes had increased in the prior two years. In addition, 86% of the survey respondents expected this growth to continue in the next two years.

Cloud fax solutions in particular are thriving, due to their ability to automate many manual processes, increase security, integrate with back-end software applications, and deliver a range of additional business benefits.

This paper examines the many benefits digital fax can deliver and offers a 10-point checklist for assessing and selecting the best cloud-based fax service provider.



# 75%

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Source: IDG/OpenText

## Driving a New Definition of Fax

Several business and technology trends and present-day realities are driving the changes in fax. Digital transformation and the current pandemic have forced organizations to rethink everything from business processes to digital infrastructure. IT and communications advances have increased efficiencies, allowed more flexibility, and sped many business operations, but these changes have also introduced new demands and challenges.

As companies face a growing set of real-time business requirements, they must automate many manual processes, which, in turn, requires integrating and consolidating formerly siloed and incompatible systems. Securing highly sensitive and valuable digital assets and meeting compliance requirements have also become ever more critical. At the same time, the explosion of digital data and digital operations has fueled the growth of highly scalable cloud computing solutions and even driven many “cloud-first” strategic initiatives.

Cloud-based enterprise digital fax solutions meet many of these demands, retaining the best aspects of faxing while *eliminating its liabilities*, including:

- Manually intensive operations
- Dedicated (and sometimes busy) phone lines
- Unreliable and paper/toner-dependent fax machines
- Inability to integrate with back-end software applications
- Generally high total cost of ownership (TCO)

Furthermore, although the electronic transmission of faxes is highly secure, manually extracting data from paper-based faxes and entering it into applications can introduce security gaps and data entry errors.

## Demand for Faxing Crosses Departments and Industries

Given faxing’s established history of securely transmitting sensitive and valuable documents, it’s no surprise that it is firmly established in many corporate departments and workflows, from Accounting and Sales to legal teams and manufacturing groups.

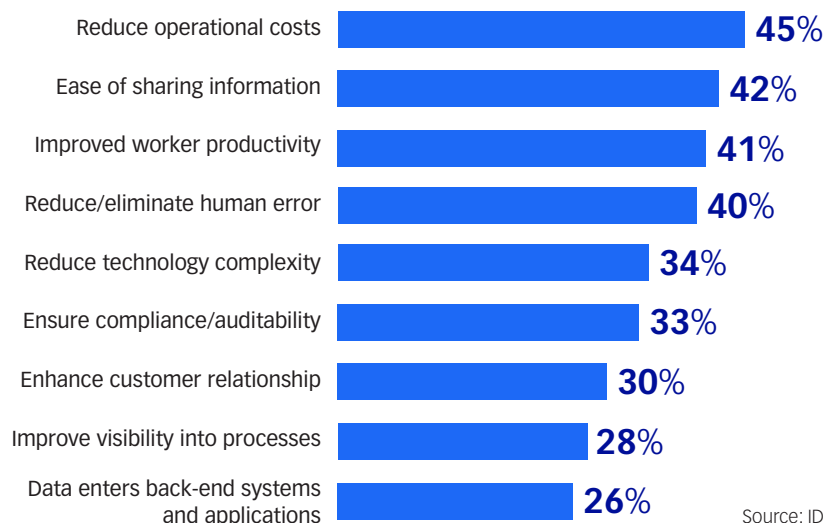
Because faxes can be encrypted and are exchanged via a point-to-point protocol and include an audit trail, faxed documents are considered legally binding. Faxing is crucial to the smooth flow of purchasing, contracts, protected information exchanges, and more. Manufacturing companies fax purchase orders and shipping documents, healthcare organizations fax electronic medical records and test results, and financial institutions fax credit applications and trade confirmations.

Now that improved options are available, various forward-looking organizations have moved to digital versions of fax technology. The IDG survey found that in four functional areas—financial, customer/patient transactions, manufacturing/supply chain, and legal—75% or more of the respondents are using digital fax to support business processes.

The IDG survey respondents identified a range of business benefits that digital fax solutions could deliver by automating processes, including the capturing and routing of fax-based data. Reduced operational costs led the benefits list, followed by ease of sharing information, improved worker productivity, and the reduction or elimination of human error (see Figure 1).



Figure 1.  
**Benefits of Automated Digital Fax Solutions**

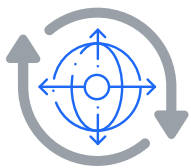


Source: IDG/OpenText

## Key Benefits of Enterprise Cloud Fax Services

Although the inherent capabilities of digital fax solutions are impressive on their own, those capabilities have value only if they translate into true business benefits. By this measure, digital solutions—particularly those that leverage the cloud—deliver a compelling collection of advantages.

- **Improved end user productivity** — From an employee's perspective, the best aspect of digital faxing might be its relative simplicity and ease of use. When fax machines, as well as their manual operation and maintenance, have been removed from the equation, employees can generate and send faxes much more efficiently and hassle-free. On the receiving end, people don't have to manually extract data from printed faxes and enter it into digital systems.
- **Reduced hardware investment and upkeep, plus lower TCO** — At an organizational level, the elimination of traditional fax infrastructure translates into not just higher productivity but also lower TCO. Companies can dispense with on-site fax hardware, supplies, maintenance, and software, as well as dedicated telephone lines. Of course, eliminating manual data extraction and entry processes on the receiving end can also deliver big TCO dividends.
- **Integration with existing processes and initiatives** — Digital faxing can complement digital transformation and cloud migration strategies and initiatives. Organizations can maintain fax-based processes that have become integral to their operations, while bringing those processes into the modern, digitally knit world.
- **Secure transmission** — Notably, cloud-based digital fax solutions build on and enhance the security and compliance strengths associated with traditional faxing. Rather than being printed and faxed, documents created via digital means are converted to immutable fax images via established fax protocols. On the receiving end, instead of being printed out on fax machines, where any passing person might view them, fax images can be delivered directly to the secure workstations of their intended recipients.



Faxing is crucial to the smooth flow of purchasing, contracts, protected information exchanges, and more.

Thanks to these and other capabilities, established and familiar faxing processes can execute more quickly, securely, and reliably once they've migrated to all-digital cloud-based platforms. Those platforms deliver a consistent anywhere, anytime faxing experience across the enterprise and shorten processing times by automating fax data extraction and distribution.

Furthermore, specific cloud-based digital fax products can provide enhanced capabilities and benefits such as:

- Leveraging defense-in-depth security features to protect the full end-to-end faxing process, from document creation and transmission through destination controls and protections
- Improving compliance adherence and decreasing compliance risk for regulations such as HIPAA and PCI DSS, by enabling fax processes to sit comfortably within established digital compliance protocols and practices
- Creating centralized record-keeping and audit trails to track each fax's creation, distribution, viewing, and data-extraction/routing history, critical capabilities for both internal efficiency and security needs as well as for legal and compliance requirements

## How to Choose an Enterprise Fax Solution

Organizations seeking cloud-based digital fax solutions need to consider more than just technical spec sheets when evaluating their choices. The cloud fax service certainly must deliver the features and performance the organization requires, but the service provider must also be able to function as a stable and innovative strategic partner.

What follows is a 10-point checklist for evaluating an enterprise fax solution and provider.

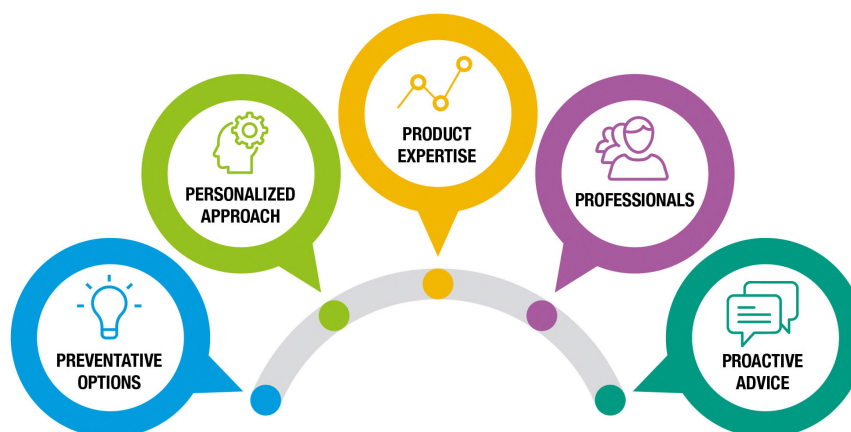
- 1 Security** — Do the solution and the provider use physical as well as digital security defense-in-depth tools and practices to protect the cloud's IT infrastructure, including virtual private networks, multitiered firewalls, rotating encryption keys for data in transit and at rest, and ongoing network monitoring?
- 2 Scalability and performance** — Can the solution rapidly scale to accommodate fluctuating fax volumes while continuing to meet service-level requirements?
- 3 Business continuity** — Do the solution and the provider offer high-availability and disaster recovery capabilities, either within a single cloud data center or spread across multiple centers, to prevent data loss and operational downtime?
- 4 Enterprise integration** — Does the solution use sophisticated fax data capture technology to identify and extract different types of fax-embedded data and, via a portfolio of connectors and APIs, route it to a wide variety of back-end systems. Does it also provide support for email integrations, web clients, mobile apps, multifunction printers, and specialized integrations such as electronic medical records/electronic health records (EMR/EHR) connectors?
- 5 Multiplatform support and deployment flexibility** — Does the provider offer the option to blend on-premises digital fax platforms with cloud-based platforms in hybrid solutions to match the preferences and requirements of individual organizations?
- 6 Breadth of product/service portfolio** — Is the digital fax product or service part of a broader portfolio that includes on-premises and cloud services for comprehensive enterprise information management, artificial intelligence, prebuilt connectors for application integration, and other offerings that, together, can form a comprehensive omnichannel solution?

- 7 Analytics and reporting capabilities** — Can the fax solution provide a comprehensive historical view to identify key statistics as well as system performance and delivery records, and can it present this information via dashboards or in easy-to-understand reports?
- 8 Automation and intelligence** — Can the digital fax solution automate most or all manual processes in existing fax workflows?
- 9 Vendor stability and experience** — Beyond the technical capabilities and breadth of the digital fax solution, what are the cloud provider's financial stability, geographic scope, staff expertise, and digital fax track record? Can it serve as a trusted, strategic partner that understands today's business needs and is able to evolve to meet future needs?
- 10 Enterprise expertise and support** — Does the provider's knowledge extend beyond the functional requirements and roles for digital fax and include awareness of compliance issues, service levels, and other relevant concerns. Such industry and cross-departmental expertise should inform and influence the design and functionality of the core digital fax offerings. In addition, that expertise can also play directly in any consulting, training, and other professional services the vendor may provide. Lastly, comprehensive and affordable support services should also be a key element on the vendor evaluation checklist.

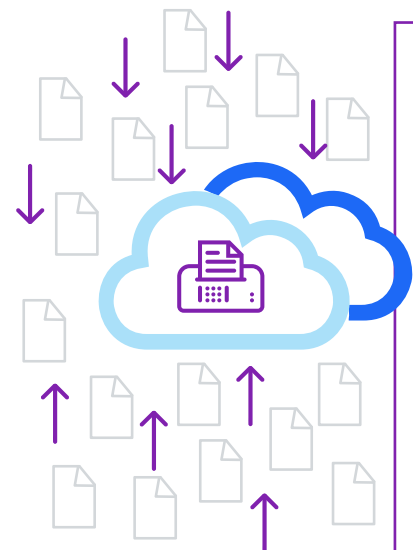
## Modernizing Fax for a Digitally Driven World

In a computing and communications landscape that has seen its share of technologies come and go over the decades, faxing is a proven long-term survivor. Faxing hasn't remained ingrained in many business processes by staying stagnant, however. The technology has evolved to take advantage of everything from enhanced security methods and cloud computing to intelligent data capture and integration capabilities.

Thanks to the advances embodied in present-day digital faxing, the technology today is positioned to be a long-term player across enterprise departments and industry sectors. But not all digital fax solutions and cloud service providers are created equal. Organizations need to perform careful due diligence to determine the best digital fax technology and the strongest service provider to meet their specific faxing needs and objectives.



For further information about how OpenText can help your organization realize the full potential of digital fax and meet your omnichannel communications needs and objectives, see <https://www.opentext.com/products-and-solutions/products/digital-experience/cloud-fax-services/>



## OpenText: The Leading Enterprise Cloud Fax Provider

For more than 30 years, OpenText has been the most trusted leader in enterprise fax solutions and transmits more than three billion faxes a year via the OpenText Cloud.

With more than \$3 billion in annual revenues, 15,000+ employees, and 120,000 customers across 40 countries, OpenText brings more to the cloud than just its digital faxing credentials and expertise. The company is a leader in information management and is an omnichannel provider of communications services, with four billion emails, SMS, and voice messages exchanged annually over its cloud infrastructure. That infrastructure includes 11 data centers and nine points of presence in North America, Europe, Asia, and Australia.

OpenText is the only company to offer digital fax solutions as cloud, hybrid, on-premises, and managed services deployment options to meet today's needs and evolve to meet tomorrow's requirements.

The company has two cloud solutions: the enterprise-class **OpenText Fax2Mail** and **OpenText XM Fax** for small to medium-size businesses. Its innovative hybrid fax solution, **OpenText RightFax Connect**, is the only cloud-based fax transmission service built specifically for OpenText RightFax its market-leading on-premises fax server. OpenText also provides managed fax services for organizations that want to offload the management of their enterprise implementations to an experienced strategic partner.

To help organizations track their cloud fax operations and performance, OpenText offers an advanced analytics dashboard that provides visibility into fax volumes, deliveries, and exceptions that may require attention. Whether deploying on-premises, hybrid or in the cloud, OpenText provides flexible deployment options with market-leading solutions to create the most powerful fax and capture combination available. For a full description of the OpenText digital capture solutions, see this "[solution overview](#)."

Regardless of their preferred implementation and management model, organizations can leverage OpenText's world-class onboarding capabilities and processes, with dedicated OpenText teams supporting all stages of the process. These teams include project managers, solution consultants, customer support professionals, and a dedicated customer manager.

For customers looking to further expand integrations beyond existing fax tools, OpenText's professional services team can provide a full range of **consulting services** that range from optimized document capture services to AI and analytics offerings.

Visit <https://www.opentext.com/products-and-solutions/products/digital-experience/cloud-fax-services/>