

Enterprise fax with capture technology is key to optimizing workflows

IT decision makers seek combined technologies and automation to increase efficiency, reduce errors, and tighten security



Contents

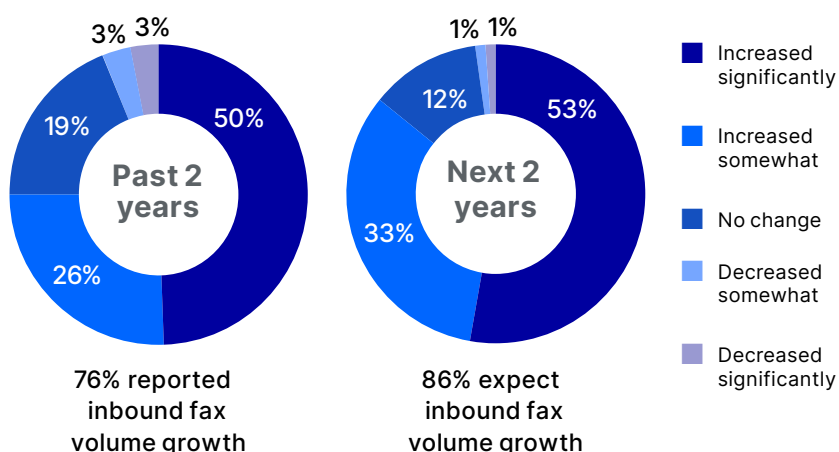
Digital fax gains momentum	3
Progress in the face of roadblocks	4
OpenText enterprise fax and capture solutions	7
Conclusion	8



Digital fax, the technology that uses secure fax protocols to send and receive paperless electronic communications, continues to gain momentum in organizations across a wide range of industries. Because faxing has been an integral part of many organizations' business communications for decades, it is often deeply embedded in key workflows. Replacing it with another mode of secure communication is simply not an option. With billions of faxes exchanged every year, it's time for organizations to automate and optimize faxing — and free the data trapped in faxed documents for use in applications across the enterprise.

Digital fax gains momentum

According to an IDG MarketPulse survey of IT decision makers, 76% of respondents said digital fax volumes had increased over the past two years, and 86% expected digital fax would continue to grow over the next two years. (See Figure 1)



Source: IDG, June 2019

Fig.1 Digital fax is on the rise

The reasons for this growth are many. Digital fax is enabling many organizations to preserve continuity with traditional business processes while eliminating the drawbacks of paper-based fax. These include the errors and inefficiency of manual handling, a lack of security, and a slowdown in productivity. (See Figure 2)

Significantly, the use of digital fax is cross-functional. Rather than limiting it to a single business process, organizations are employing digital fax across four different functional areas, including financial, customer/patient transactions; manufacturing or supply chain; and legal. (See Figure 3)



Fig.2 Challenges in processing fax-based content

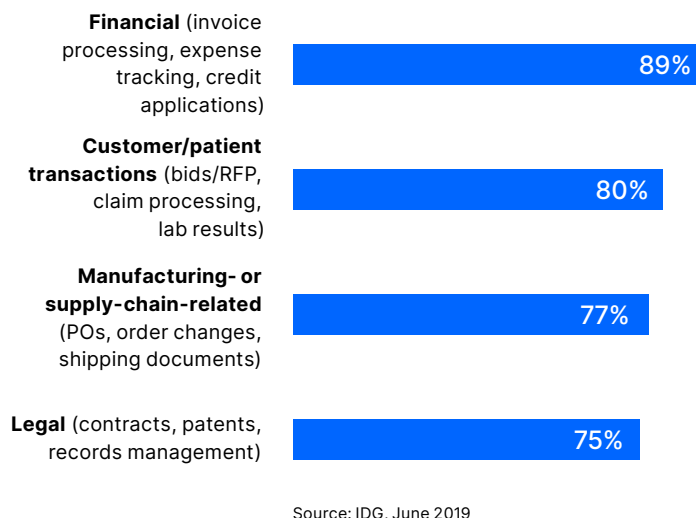


Fig.3 Digital fax solutions cross-functionally support many business processes

With such broad adoption within and across organizations, it's important to fully understand the pivotal role digital fax plays in the sequence of business processes. Critical workflows typically begin with the receipt of an inbound fax document. Because a fax is essentially a picture of the content, it must be transformed into data to be consumed by an application, an operation often performed manually. The recipient views the fax, uploads it as an image into a system, or re-keys the information into an application as data. Each step is a time-consuming, error-prone process.

Digital fax solutions offer integration features that allow faxes to flow into applications such as ERP, CRM, and electronic medical records systems. The key to entering fax data into back-end applications is smart data capture technology that automatically extracts and intelligently routes data to the appropriate system. The result: Enterprises unlock the full value of data trapped in fax documents.

Progress in the face of roadblocks

Despite the momentum behind digital fax, the survey found many organizations are encountering obstacles in their use of fax technology that could erode their productivity and profitability significantly. The survey tracks these challenges and the solutions that respondents say would be most effective in overcoming them.

Lack of automation

Perhaps the greatest obstacle to productivity is the prevalence of manual processes in handling inbound faxes — especially extracting data. Only a small percentage of enterprises have completely automated the capture and extraction of fax-based content.

Even in fields where significant progress has been made, plenty of work remains. For example, financial content is most likely to be automatically captured and extracted: Fifty-two percent have mostly or completely automated the process. Yet, that percentage is barely more than half; 48% are still using mostly manual or completely manual methods. Lagging further behind is legal content, where processes are still mostly or completely manual at 64% of organizations.

Reliance on manual processes often leads to errors in scanning, extracting, and routing content. It is significant, therefore, that human error is the top challenge when processing fax-based content (46%), followed by security and compliance risk (41%). In practice, the errors in scanning, extracting and routing content are related. The use of manual processes exposes personal information to view by office personnel. Paper documents can be lost, misplaced, or stolen easily. And should personal information be routed incorrectly, it could be stored insecurely, leading to theft or regulatory compliance violations.

The downside of all these occurrences can be extreme. Lost or stolen data can cause financial losses in the hundreds of millions of dollars; failure to comply with regulatory guidelines exposes an organization to multimillion-dollar fines.

The urge to improve

The desire among survey respondents to seek improvements to current processes reflects the widespread transmission of fax-based content and an understanding of its pivotal role in workflows: Ninety-eight percent are at least somewhat likely to consider looking for ways to improve processes for handling fax-based content.

This commitment to improvement shows that respondents foresee a central role for fax technology going forward. It also shows they are aware of the room for improvement — that inefficiencies exist in their handling of fax-based content.

When asked which features their organization finds most important when evaluating technology that can improve fax-based processes, respondents ranked data security as first. In second place, scalability reflects the anticipated growth of the technology in the immediate future: the technology purchased today must be able to handle a workload that is expected to increase year after year. Ease of use is in third place, no doubt reflecting the time-consuming and error-prone ordeal of manual processes that prevail in many organizations.



Use cases for enterprise fax with capture technology

Capture to archive: A received document must be stored securely in a document repository, application, or file store location. Examples of such documents include patient records, contracts, rate changes, HR records, court filings, trade confirmations, lab reports, patents, property records, and emergency records.

Capture to process: A received document starts a workflow or business process. Falling into this category are purchase orders, invoices, shipping orders, customer applications, claim forms, change orders, collections, patient referrals, and bills of lading.

The desired solution

Survey respondents recognize the importance of digital fax and capture technology to initiate workflow processes. They also are aware of the burden of manually handling fax-based input within the organizational workflow. The overwhelming majority (82%) say they would consider a solution very valuable or extremely valuable that could automate two critical processes:

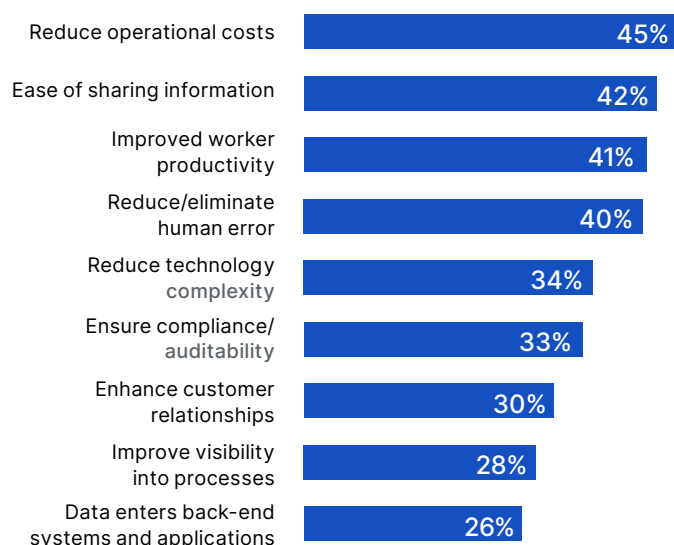
- **Automatically capture and extract data** from email attachments, faxes, or paper.
- **Intelligently route that data** to appropriate applications or records systems in a usable format.

Significantly, the enthusiasm of respondents regarding automatic capture and intelligent routing is directed to technology that can handle not only fax communications but also email attachments and paper input. Clearly, respondents are attracted to a single solution that unifies processes for these different content sources.

Benefits of automated enterprise fax with intelligent capture technology

Integrating digital fax with capture technology is key to freeing otherwise trapped content. It kicks off subsequent steps of interpretation, data extraction, routing, processing, and archiving. Organizations that can master each of these workflow stages should realize significant productivity gains, enabling them to readily handle increased volumes as their businesses expand, while keeping costs under control. More importantly, these organizations should gain a significant competitive edge.

Survey respondents identify nine potential benefits of a technology that could capture and intelligently route fax-based content. In findings that echo responses to earlier questions in the survey, cost reduction is the most compelling anticipated gain (45%), followed by easier information sharing (42%), improved worker productivity (41%), and reduced/eliminated human error (40%). (See Figure 4)



Source: IDG, June 2019

Fig.4 Benefits of automated enterprise fax

OpenText enterprise fax and capture solutions

OpenText capture solutions automate processes such as manually keying data from fax image or manually routing an incoming fax to the appropriate recipient or workflow. With OpenText, your organization can combine fax and capture from a single vendor. Capture systems, such as OpenText™ Capture classify, extract, and verify information, applying a common set of business rules to reduce exception processing. The result is acceleration of business processes, leading to enhanced customer relationships, reduced errors or downstream bottlenecks, and improved cash flow. In addition, there is a reduction of compliance risks because each incoming document is connected automatically to its appropriate business transaction through automated workflows.

Whether deployed on-premises, in the cloud or a hybrid of the two, OpenText provides flexible options with market-leading solutions to create the most powerful fax and capture combination available.

On-premises fax server and capture server software

- **OpenText Fax** (RightFax) is enterprise fax server software that provides electronic, paperless faxing to and from desktop, email, and business applications. OpenText Fax continues to be a market leader, providing best practices to thousands of customers for more than forty years.
- **OpenText Fax Intelligent Workflows** is a fully integrated capture module that combines OCR data captured from forms-based fax templates with flexible downstream workflows to speed to process of fax processing.
- **OpenText Capture** is a flexible, end-to-end capture solution that includes document capture, document classification, data extraction/optical character recognition (OCR), validation, and delivery to back-end systems.

Cloud SaaS based faxing and capture workflows

- **OpenText Core Fax** is an enterprise-grade multi-tenant cloud solution that can be tailored to meet the needs of businesses of all sizes. The best-in-class cloud fax solution integrates with and streamlines workflows across the entire organization and is crafted to seamlessly align with essential industry regulations, such as HIPAA, ISO 27001, GDPR, SOC 2, and PCI DSS.
- **OpenText Core Fax supports integrated** workflow routing by rules, barcode, or OCR data captured from inbound faxes for flexible downstream workflows to speed to process of fax processing.
- **OpenText Capture** is a flexible, end-to-end capture solution that includes document capture, document classification, data extraction/optical character recognition (OCR), validation, and delivery to back-end systems.

Resources

[Visit us to learn more about OpenText enterprise fax and capture solutions.](#)

Conclusion

IT decision-makers are realists. According to our survey, they recognize that the use of fax-based communications within their organizations is growing. Survey respondents also recognize the unwieldiness, lack of security, and risk of error inherent in manually handling paper-based fax documents and inputting data from them.

Because they understand the importance of fax in general and the growing role of digital fax technology in particular, respondents are eager to improve the efficiency and security in handling fax-based documents throughout organizational workflows. They would welcome a solution that automatically captures and extracts content from faxes, email attachments, and paper and intelligently routes that content to appropriate applications and records systems in a usable format. And because digital fax supports a broad range of business processes, the many benefits of such an automated and intelligent fax and capture solution would improve the competitive posture of any organization in any industry significantly.