The modern digital fax buyer's guide

Your roadmap to a smarter, more secure, future-ready fax environment

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Fax remains a critical communication channel for regulated industries including healthcare, government, financial services, insurance, and legal operations where confidentiality, delivery assurance, and auditability are non-negotiable. While technology has evolved, the need for secure document exchange has only intensified.

Organizations face rapid modernization initiatives: migrating applications to SaaS platforms, retiring legacy telephony, consolidating data centers, and adopting AI-driven automation. At the same time, regulatory pressure continues to grow.

The Federal Communications Commission (FCC)'s approval of Plain Old Telephone Service (POTS) line retirement has accelerated the shift from analog telephony. Rising costs, declining reliability, and carrier decommissioning mean traditional fax infrastructure is no longer sustainable. Meanwhile, compliance frameworks, including HIPAA, HITRUST CSF, SOC 2, FedRAMP, GDPR, and state-level privacy laws, require tighter controls and higher resilience than legacy systems can provide.

On-premises fax servers struggle to keep pace. Hardware maintenance, telephony disruptions, capacity constraints, and increasing security risks make traditional environments costly and labor-intensive. Modern cloud fax platforms eliminate these challenges by providing secure, scalable, compliant, AI-enabled fax capabilities without the overhead of physical infrastructure.

The good news? Organizations can modernize without sacrificing the reliability and security you depend on. This guide walks you through today's fax modernization landscape: deployment options, cost considerations, required capabilities, and how to plan a seamless migration.

Whether your infrastructure is reaching end of life, you're preparing for a data center exit, or you want to free IT resources for higher-impact work, this guide will help you confidently plan your transition to a modern, cloud-enabled fax environment.

The new era of fax: Why modernization matters

Modern fax has transitioned from analog hardware to integrated, cloud-native, intelligent communication. Several powerful forces are accelerating modernization:

1. Cloud modernization and application consolidation

As organizations migrate EMRs, ERPs, CRMs, content systems, and business apps to SaaS, fax must integrate seamlessly. Legacy servers can't keep up with modern workflows.

2. POTS line retirement

FCC-enabled POTS decommissioning has made analog telephony costly and unreliable. Cloud telephony eliminates dependency on physical lines and PBX hardware.

3. AI-powered workflows

Industries now expect intelligent document workflows. AI-driven digital fax solutions provide:

- Automated routing
- Document extraction
- Classification and prioritization
- Summarization
- Analytics and decision support

This reduces workload and speeds time-sensitive operations.

4. Rising compliance and security requirements

Regulated industries must meet: HIPAA, HITRUST CSF, SOC 2, FedRAMP, GDPR, CCPA, and increasingly strict cybersecurity mandates. Cloud fax providers are better equipped to maintain these controls consistently.

5. Escalating on-premises costs

Power, cooling, private branch exchange (PBX) maintenance, hardware refresh cycles, and server administration consume budgets and staff time. Modernization removes this overhead and aligns fax with cloud-first IT strategies.

Understanding your deployment options

Organizations evaluating modernization typically choose among three deployment models:

1. Private cloud fax (fully managed model)

Private cloud fax is a fully dedicated, provider-managed environment designed for organizations that require exclusive control, heightened security, and predictable performance within a cloud-based fax infrastructure. Unlike shared platforms, a private cloud environment reserves compute, storage, network paths, and supporting systems for a single customer, delivering a level of isolation that meets stringent governance and regulatory expectations.

In this model, the service provider assumes full responsibility for hosting, maintaining, and supporting the fax environment. This includes managing the operating systems, application layers, telephony integrations, patch cycles, upgrades, monitoring, and ongoing system health. Customers no longer need to maintain physical servers or telecom hardware, yet still retain the privacy and segregation traditionally associated with on-premises deployments.

Private cloud fax typically leverages enterprise-grade cloud infrastructure with dedicated virtual networks, security boundaries, and encrypted communication channels. The architecture is built with high availability as a core component. Multiple cloud availability zones, redundant telephony paths, automated failover capabilities, and continuous monitoring work together to keep fax operations reliable and resilient, even during unexpected disruptions.

Telephony is integrated natively into the environment, eliminating dependence on local PBX systems or aging analog lines. This unified telephony approach ensures consistency, simplifies operations, and supports number portability and large-scale faxing without capacity limitations or telecom constraints.

One of the most significant strengths of private cloud fax is its alignment with regulatory and compliance frameworks. Industries that handle sensitive or regulated information, such as healthcare, financial services, government, and legal sectors, often require strict data residency controls, advanced security safeguards, and verifiable audit trails. Private cloud deployments are designed to support these needs, offering compliance-ready controls that map to standards such as HIPAA, HITRUST, SOC 2, GDPR, FedRAMP-aligned environments, and other industry-specific mandates.

Private cloud fax is an ideal choice for organizations undergoing data center exits, consolidating infrastructure, modernizing outdated fax systems, or shifting away from physical fax servers while maintaining control over their data environment. It combines the benefits of cloud-based reliability and managed operations with the isolation and governance structure needed by enterprises with higher compliance, performance, or contractual requirements.

2. Hybrid cloud fax

Hybrid cloud fax provides organizations with a flexible, staged approach to modernization by blending elements of existing on-premises fax environments with cloud-based services. Rather than requiring an immediate full migration, hybrid models allow organizations to transition at a measured pace, preserving critical local integrations while still benefiting from modern cloud telephony, improved reliability, and reduced infrastructure burden.

In a hybrid deployment, organizations may choose to move specific components, most commonly telephony to the cloud first. This eliminates reliance on analog lines, PBX systems, and telecom hardware that are increasingly costly and difficult to maintain. Cloud telephony routes inbound and outbound fax traffic through the service provider's infrastructure, while the organization continues to operate its on-premises fax servers and workflows. This approach delivers immediate improvements in performance, scalability, and operational stability without requiring a complete system overhaul.

Hybrid models can also support scenarios where certain applications or departmental workflows depend on localized integrations that are not yet ready for cloud migration. By allowing fax servers or workflow components to remain on premises, organizations maintain compatibility with existing systems while planning for future modernization. This design ensures business continuity and minimizes disruption, especially in highly interconnected environments such as hospitals, financial institutions, or government agencies.

Hybrid cloud fax is especially valuable for organizations with complex infrastructures, specialized integrations, or long-term modernization goals. It enables teams to begin the transition away from aging telephony and hardware while maintaining stability, protecting existing investments, and creating a clear pathway toward a fully cloud-based fax environment when the timing is right.

3. SaaS cloud fax

SaaS cloud fax delivers faxing as a cloud-based service rather than relying on on-premises servers, telephony hardware, or customer-hosted infrastructure. In this model, all fax processing, transmission, storage, security, system updates, and redundancy are handled by the provider within a multi-tenant, cloud-native environment. Organizations simply consume fax as a service much like they do with Microsoft 365, Salesforce, or other modern SaaS platforms.

Because the platform is multi-tenant, customers benefit from shared infrastructure, continuous enhancements, and elastic scaling without managing the underlying technology stack. Each customer's data remains isolated, encrypted, and controlled, but the operational efficiency of the shared platform allows for faster innovation and significantly lower management overhead.

SaaS cloud fax provides high reliability through built-in geographic redundancy, automatic failover, and real-time monitoring all delivered without customer intervention. Updates, patches, and improvements occur seamlessly, ensuring the platform remains secure, compliant, and current without any maintenance tasks assigned to internal IT teams.

For organizations pursuing cloud modernization, closing data centers, eliminating legacy telephony, or simplifying their technology footprint, SaaS cloud fax offers a clean, future-proof operating model. It removes infrastructure burdens, reduces long-term costs, and aligns fax operations with modern IT strategies delivering a streamlined, fully supported, and always-up-to-date communication service.

Which deployment type should you choose

Organizations select different fax deployment models based on how quickly they want to modernize, how much operational responsibility they want to offload, and how much change management they are prepared to absorb. Hybrid cloud fax is often chosen by organizations that want to eliminate the operational and cost burden of telephony while keeping their fax server infrastructure on-premises.

In this model, telephony is moved to the cloud, improving reliability, scalability, and resilience, while fax servers remain local to preserve existing integrations, maintain tighter control over data, and minimize disruption to established workflows. Private cloud fax is typically selected by organizations that want a fully managed, white-glove service without fundamentally changing how users interact with the fax application. Because private cloud deployments often mirror the on-premises user experience and application architecture, they require minimal change management while delivering the benefits of cloud hosting, dedicated infrastructure, strong isolation, and guaranteed service levels. SaaS (public) cloud fax is generally chosen by organizations ready for a more transformative shift, where fax is consumed as a cloud-native service built on multi-tenant architecture.

This model delivers the fastest access to innovation, elastic scale, and simplified operations, but typically introduces a new user experience and platform model aligned with intrinsic SaaS capabilities, such as multi-tenancy and co-location. Together, these deployment options allow organizations to modernize fax in a way that aligns with their integration complexity, data governance requirements, operational preferences, and readiness for change.

The real cost of staying on premises

Organizations often underestimate the full total cost of ownership (TCO) of on-premises fax environments. Costs include:

- **Infrastructure maintenance:** Servers, OS patching, storage, backup systems, failover hardware.
- **Telephony and PBX management:** SIP trunks, PRI circuits, analog lines, rising POTS surcharges.
- **Staffing burden:** IT teams spend substantial time monitoring, troubleshooting, updating, and supporting fax systems.
- **Disaster recovery requirements:** Additional hardware, replication configuration, failover testing, and DR documentation.
- **Security and audit complexity:** Maintaining logs, encryption standards, firewall rules, compliance documentation, and access controls.
- **Opportunity cost:** Every hour spent fixing fax issues is time not spent advancing digital transformation, cybersecurity efforts, or strategic initiatives.

- **Facility costs.** Physical servers need rack space, power, cooling, and physical security. These costs are easy to overlook but very real.
- **Upgrade cycles.** On-premises systems age. Eventually, you'll face a major upgrade or replacement. Cloud solutions eliminate this cycle, providing continuous updates and improvements without capital expenditure.

When you compare total cost of ownership over a three- to five-year period, cloud fax consistently yields better economics and significantly reduces risk exposure.

What to look for in a modern fax solution

Selecting a modern cloud fax platform requires a thorough evaluation of capabilities that support reliability, scalability, security, and long-term modernization. The right fax solution must seamlessly integrate with cloud strategies, strengthen compliance, and support increasingly complex workflows across regulated industries. Prioritize solutions that offer:

1. Enterprise-grade telephony with global coverage

A modern fax platform must incorporate carrier-grade telephony that ensures consistent, reliable fax transmission at scale. This includes global reach, intelligent routing, redundancy across multiple telecom carriers, and the ability to support high-volume operations without performance degradation. Embedded telephony eliminates the need for PBX hardware, SIP trunks, PRI circuits, or analog lines, enabling organizations to retire outdated systems and reduce telephony management overhead. The result is stable, predictable, and resilient faxing across all business units and geographic regions.

2. High availability and built-in disaster recovery

Fax often supports time-sensitive workflows, clinical exchanges, financial transactions, legal notices, and government documentation, making uptime mission-critical. A modern cloud fax solution must include multi-zone redundancy, real-time failover, resilient network architecture, and geographically distributed infrastructure. Disaster recovery capabilities should be inherent and automatic, not an add-on or a customer-managed task. This ensures continuity even during unexpected events, infrastructure failures, or regional outages, helping organizations meet internal SLAs and regulatory availability requirements.

3. Scalable architecture that grows automatically

Cloud fax must scale with the business needs, both planned and unplanned. A future-ready platform expands capacity dynamically to absorb spikes in fax traffic, onboarding of new departments, seasonal volume increases, or broader organizational growth. This eliminates the hardware bottlenecks and capacity limitations of on-premises systems. With elastic scale, organizations can support new workflows and rapidly deploy fax to additional locations or applications without provisioning additional infrastructure.

4. Comprehensive integrations with business and clinical systems

Modern fax workflows extend beyond simple document transmission—they feed revenue cycle operations, clinical documentation, legal processes, customer service, claims management, procurement, and more. A modern solution should provide deep integration capabilities with EMRs (Epic, Oracle Health, Veradigm, Meditech), ERPs, CRMs, SharePoint, content management systems, case management tools, and custom internal applications. Support for APIs, SFTP, secure connectors, and workflow orchestration tools enables end-to-end automation, eliminating manual steps and bringing fax fully into digital business processes.

5. Robust security and compliance controls

Security is a foundational requirement across all industries that handle sensitive information. A modern fax platform must offer strong encryption in transit and at rest, role-based access control (RBAC), multi-factor authentication (MFA), secure network paths, and comprehensive audit logs. The platform should support compliance with HIPAA, HITRUST CSF, SOC 2, GDPR, CCPA, and other relevant frameworks. By delivering a hardened, proactively monitored environment, modern cloud fax reduces risk while meeting the highest standards of data protection.

6. User-friendly interfaces across all devices

The everyday user experience should be intuitive and consistent whether accessed via web, desktop, or mobile. Users should be able to submit, track, search, and retrieve faxes without navigating complex menus or requiring extensive training. A clean, modern interface improves productivity across clinical teams, administrative staff, financial departments, legal offices, and any other business unit dependent on fax communication.

7. Analytics and operational dashboards

Visibility into fax traffic and system performance is essential for IT, compliance, and operational leaders. Modern fax platforms should provide real-time dashboards, historical reporting, and trend analysis across departments, numbers, and workflows. Insights into error rates, throughput, usage spikes, and transmission success help organizations optimize processes, identify inefficiencies, meet audit requirements, and plan for future capacity.

8. Embedded AI for workflow efficiency

AI has become a central component of modern fax systems, transforming what happens after a document is received. Instead of relying on staff to manually sort, interpret, and route inbound faxes, AI enables automated document understanding and processing at scale.
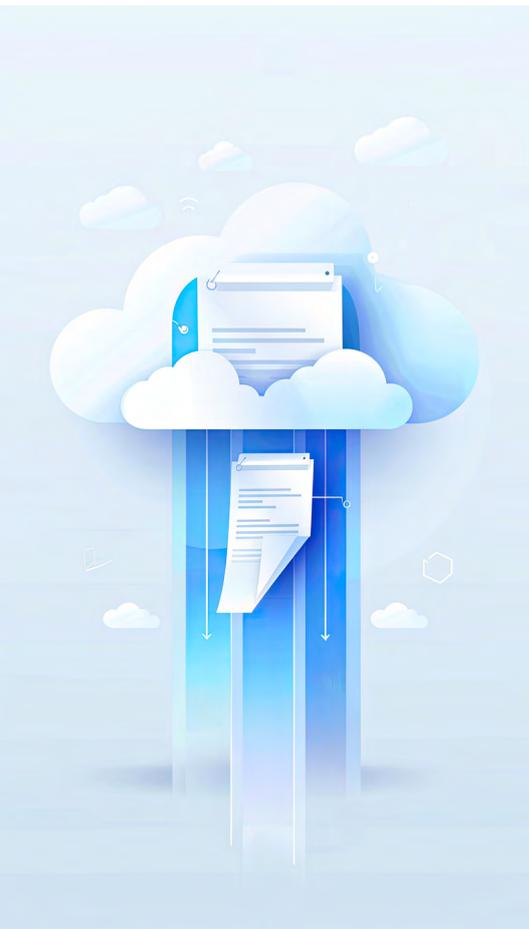
Key AI-enhanced capabilities include:

- Automated routing of documents to departments, queues, or workflow endpoints.
- Document classification to identify whether a fax is a claim, referral, authorization, order, legal document, financial packet, or administrative form.
- Information extraction to capture key fields like claim IDs, patient names, case numbers, dates, and other structured data.
- Content summarization to reduce time spent reviewing long, multi-page documents.
- Error detection for duplicate transmissions, missing pages, or misrouted items.
- Operational insight through analysis of volume patterns, workflow bottlenecks, and process inefficiencies.

AI converts inbound fax documents into actionable information, accelerating decision-making, reducing administrative burden, and improving accuracy across mission-critical operations.

9. Professional migration services and 24/7 expert support

Moving from legacy fax systems often involves complex routing rules, telephony dependencies, and integrations with critical business systems. A capable provider should offer structured migration services, project management, testing support, and best practices to ensure a smooth transition. After deployment, around-the-clock support ensures stability, quick issue resolution, and continued operational confidence.

10. Predictable pricing aligned with usage and growth

Organizations benefit most from pricing models that align with usage patterns and scale with the business. Modern cloud fax platforms should offer transparent, consistent pricing that eliminates the hardware investments, telecom spending, and maintenance costs associated with on-premises environments. Predictability helps IT and finance teams create accurate budgets while supporting long-term modernization.

Security and compliance requirements

Fax often carries regulated data including personal health information (PHI), financial records, legal documents, and sensitive government information. If security or compliance concerns are holding you back from cloud adoption, here's what you should know:

1. **Data sovereignty and residency:** Leading cloud fax providers offer region-specific deployments, keeping your data within geographic boundaries that meet your compliance requirements. OpenText™ Fax Private Cloud supports deployments across North America, Europe, the Middle East, and Australia.

2. **Encryption everywhere:** Data should be encrypted in transit and at rest. Look for solutions that use industry-standard encryption protocols and support secure connectivity through VPN or private links.

3. **Compliance certifications:** Your provider should maintain certifications relevant to your industry HIPAA for healthcare, SOC 2 for general security, HITRUST for health information, and FedRAMP for government. Regular third-party audits provide independent verification.

4. **Access controls and audit trails:** Role-based access, multi-factor authentication, and comprehensive audit logs help you maintain security and demonstrate compliance during audits.

5. **Security by design:** Cloud providers invest heavily in security infrastructure, threat detection, and incident response capabilities that are difficult and expensive to replicate on premises.

Making migration seamless

Moving to cloud fax does not mean giving up control; it means partnering with experts who manage reliability, security, and operational excellence full time. While migration is often one of an organization's biggest concerns, the process can be smooth, predictable, and low risk with proper planning and a structured approach. A successful transition follows several key stages:

1. Environment assessment

The migration journey begins with a thorough inventory of your existing fax landscape. This includes cataloging servers, telephony configurations, integrations, workflows, routing rules, number inventories, departmental use cases, and volume patterns. Understanding dependencies and current-state complexities allows teams to prioritize which workflows or departments transition first.

2. Parallel testing and validation

Before any cutover occurs, the provider deploys a cloud environment that operates in parallel with the existing on-premises system. Test data is sent through the new environment to validate integrations, routing logic, user workflows, and performance. This phase is essential for building confidence, uncovering potential issues early, and ensuring user buy-in.

3. Telephony and number porting strategy

A structured telephony plan is critical to avoiding downtime. Providers handle number porting, but sequencing matters. Many organizations choose to port numbers to existing on-premises servers initially or use temporary routing approaches, then complete final cutover once cloud validation is complete. This phased method reduces risk, prevents service interruptions, and accelerates time to value.

4. Phased departmental rollouts

A cloud fax migration does not need to happen all at once. Rolling out departments or use cases in stages allows organizations to validate success incrementally and troubleshoot issues with minimal disruption. This measured pace supports stronger user adoption and smoother operational transition, particularly in complex environments.

5. End-user preparation and readiness

Successful migrations include comprehensive user preparation. This may involve training sessions, workflow review, reference guides, and communication plans. Ensuring users understand the new system, how to access it, and what changes to expect helps secure early engagement and reduces resistance during transition.

6. Defined success metrics and continuous tracking

Clear performance indicators help organizations measure the impact of migration. Common success metrics include:

- Reduction in IT support tickets
- Higher fax transmission success rates
- Faster document delivery
- Fewer telephony issues
- Enhanced audit and compliance visibility
- Improved user satisfaction

Tracking these metrics before and after migration demonstrates value and supports continuous improvement.

With the right planning, expert guidance, and structured execution, most organizations complete their cloud fax migration within **90 to 120 days**, from kickoff to full go-live. A disciplined approach ensures stability, reduces risk, and provides a seamless experience for both users and IT teams as the organization moves confidently into a modern, cloud-enabled fax environment.

AI-powered digital transformation with OpenText Fax Aviator

AI has become a foundational requirement for modern fax environments, transforming what was once a simple document transmission process into an intelligent, automated, and highly efficient workflow engine. Organizations across healthcare, finance, insurance, government, and legal sectors depend on fax to move sensitive information quickly and accurately–and AI dramatically enhances the speed, precision, and reliability of those workflows. Rather than treating inbound fax documents as static images that require manual handling, AI assistants like OpenText™ Fax Aviator helps interpret content, make decisions, and support downstream processes with minimal human intervention.

Buyers should understand how different forms of automation and intelligence are applied, how accuracy is managed, and how these capabilities are governed in production environments.

Understanding the layers of intelligence in digital fax

Modern fax platforms typically apply AI across multiple layers, each serving a distinct purpose:

Rules-based automation

This is the foundation of many fax workflows and remains critical in regulated environments. Rules-based logic uses predefined conditions such as sender number, destination number, document type, keywords, or routing tables to reliably direct faxes to the correct system, queue, or department. These workflows are deterministic, predictable, and auditable, making them well-suited for high-compliance use cases.

Machine learning (ML)–assisted extraction and classification

ML models are used to recognize patterns within faxed documents and extract structured data fields such as patient identifiers, claim numbers, dates, totals, or authorization codes. These models improve accuracy over time and significantly reduce manual data entry. Importantly, ML-assisted extraction is typically paired with confidence scoring, allowing organizations to define thresholds at which extracted data is accepted automatically or flagged for review.

LLM-driven summarization and contextual understanding

Large Language Models (LLMs) are applied to interpret unstructured fax content and generate concise summaries that surface key information. This capability is especially valuable for long, multi-page documents such as medical records, legal packets, or financial disclosures. LLM-based outputs are typically advisory in nature, accelerating human decision-making rather than replacing it.

Together, these layers allow organizations to apply the right level of intelligence to the right task, balancing automation, accuracy, and control.

Built for accuracy, oversight, and exception handling

From a buyer's perspective, confidence in AI hinges on how accuracy and risk are managed. Mature AI-enabled fax platforms address this through several mechanisms:

- Accuracy thresholds and confidence scoring determine whether data is processed automatically or routed for human validation.
- Human-in-the-loop workflows ensure that exceptions, low-confidence extractions, or ambiguous documents are reviewed before downstream actions occur.
- Exception management queues allow staff to efficiently handle edge cases without disrupting overall workflow efficiency.
- Auditability and traceability ensure that AI-assisted decisions can be reviewed, explained, and validated as an essential requirement for regulated industries.

This approach allows organizations to automate high-volume, low-risk tasks while retaining human oversight where precision and judgment are required.

Production reality vs. roadmap vision

A critical distinction for buyers is whether AI capabilities are in production today or positioned as future roadmap items. Mature platforms clearly differentiate between:

- Capabilities actively deployed in customer environments
- Features available for controlled rollout
- Enhancements planned for future releases

Equally important are governance controls, including safeguards around data handling, model usage, output validation, and alignment with compliance requirements. These controls ensure that AI enhances operations without introducing regulatory or operational risk.

Modern AI-enhanced fax platforms provide several advanced capabilities that directly support operational efficiency and regulatory compliance:

1. Automated routing without manual review

Historically, staff had to manually sort incoming faxes, determine their purpose, and forward them to the correct department or workflow queue. AI eliminates this manual gatekeeping by reading the content of each fax and automatically determining where it belongs. Whether it's routing a referral to a clinical group, a claim to the billing team, or a legal document to case management, AI ensures documents reach the right destination by instantly reducing delays and freeing staff from repetitive sorting tasks.

2. Data extraction for clinical, financial, or operational fields

Many faxed documents contain structured information such as patient identifiers, claim numbers, invoice totals, dates, account IDs, authorization details, or contract references. AI can identify and extract these fields directly from fax content, enabling organizations to populate downstream systems automatically. This eliminates the need for manual keying, reduces data entry errors, accelerates workflow initiation, and allows teams to focus on exceptions rather than routine processing.

3. Document summarization for faster triage and decision-making

Many inbound faxes, such as medical records, legal packets, financial disclosures, or multi-page forms, are lengthy and time-consuming to read. AI can generate concise, structured summaries that highlight key details, enabling staff to assess urgency, understand context, and take action without reviewing every page. This is particularly valuable in high-volume or time-sensitive environments, such as prior authorization teams, claims processors, and legal operations.

4. Classification of documents by type or priority

AI can determine what kind of document has been received, such as a prescription, contract, referral, invoice, consent form, authorization request, or lab report, and assign the correct category automatically. It can also flag urgency or escalate high-priority documents based on recognized keywords, context, or patterns. This structured classification enables automated workflows, reduces misrouting, and improves response times across the organization.

5. Reduced errors through intelligent system decisions

AI reduces common fax processing errors such as misrouting, duplicate processing, missing pages, or incomplete documentation. By automatically validating content and identifying inconsistencies, AI ensures cleaner workflows and prevents costly downstream issues. This increases accuracy, strengthens compliance, and reduces the burden on quality assurance teams.

6. Accelerated workflows across regulated industries

AI significantly increases the velocity of fax-driven workflows, whether it's accelerating medical authorizations, speeding up financial transactions, enhancing claims processing, supporting legal case intake, or streamlining government documentation. By processing information faster, more accurately, and with fewer manual touchpoints, AI helps organizations meet service-level targets, improve customer outcomes, and reduce operational friction.

AI effectively transforms fax from a passive document delivery mechanism into a dynamic, intelligent workflow engine. It allows fax to integrate deeply with electronic systems, trigger automated processes, and support high-volume operations with greater efficiency and consistency. For organizations with mission-critical fax communication, AI is no longer a future enhancement it is a fundamental requirement for modernizing, scaling, and optimizing operations.

Concrete workflow example: Healthcare prior authorization intake

Consider a healthcare prior authorization workflow where inbound faxes arrive containing multi-page authorization requests from providers. The fax platform automatically routes documents to the authorization intake queue using rules-based logic. ML-assisted extraction captures key fields such as patient name, member ID, procedure codes, and ordering provider. Confidence thresholds determine whether extracted data is passed directly into the authorization system or flagged for review. An LLM-generated summary highlights the requested service, urgency indicators, and missing documentation, allowing staff to triage cases quickly. Exceptions such as incomplete forms or unclear information are routed to a review queue for human validation.

The result is faster intake, reduced manual effort, improved accuracy, and shorter authorization turnaround times without removing human control from critical decision points.

From aspirational to operational

AI in modern fax is most effective when applied pragmatically, augmenting workflows, improving speed and accuracy, and reducing administrative burden while preserving transparency and control. When buyers see clear distinctions between automation types, defined accuracy safeguards, and real-world use cases already in production, confidence shifts from "aspirational AI" to operational intelligence.

For organizations that depend on fax for mission-critical communications, AI is not about replacing people; it is about enabling them to work faster, smarter, and with greater confidence.

A practical decision framework

Every organization approaches fax modernization with different constraints, priorities, and timelines. Use the framework below to align your current reality with the most appropriate deployment model.

Choose a hybrid cloud model if your organization wants to eliminate the burden and risk of managing telephony infrastructure but must retain on-premises fax servers due to complex integrations, strict data control requirements, or phased modernization plans. This approach minimizes disruption while delivering immediate operational improvements.

Choose a private cloud model if you require a fully managed, white-glove service with dedicated infrastructure, strong isolation, and guaranteed service levels while maintaining a familiar user experience and application architecture. This model is well-suited for organizations exiting data centers or modernizing legacy environments with minimal change management.

Choose a SaaS (public) cloud model if your organization is ready to consume fax as a cloud-native service with the lowest operational burden, elastic scale, and rapid innovation. This approach aligns best with cloud-first IT strategies and organizations prepared for platform and user-experience change.

This framework helps organizations align technology choice with operational readiness, governance requirements, and long-term modernization goals.

Fax capability maturity matrix

Not all fax solutions labeled "cloud" deliver the same level of capability. Understanding maturity stages helps buyers evaluate vendors beyond marketing claims.

Capability Area	Basic Fax	Cloud Fax	Intelligent Fax
Infrastructure	On-premises servers	Cloud-hosted	Cloud-native
Telephony	PBX/POTS	Cloud telephony	Fully integrated
Scalability	Fixed	Elastic	Elastic + optimized
Availability	Limited DR	Multi-zone HA	Built-in resilience
Integrations	Manual/Some APIs	API-based	Workflow driven
Automation	Minimal	Rules-based	AI-enhanced
Insights	Limited	Reporting	Predictive analytics
Operations	IT-managed	Provider-managed	Fully optimized

This progression highlights that modernization is not just about hosting location but about intelligence, resilience, and operational efficiency.

Risk considerations: What can go wrong with underpowered cloud fax solutions

Not all cloud fax platforms are built for enterprise-scale or regulated environments. Organizations should be aware of common risks when selecting underpowered vendors:

- Insufficient telephony redundancy leading to outages
- Limited integration capabilities that increase manual handling
- Weak security controls or unclear compliance posture
- Poor migration planning resulting in downtime or failed number ports
- Lack of enterprise-grade support and operational visibility

These risks often surface after go-live, when remediation is costly and disruptive. Selecting a mature provider with proven operational depth significantly reduces long-term exposure.

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Your path forward

Ready to explore cloud fax? Here's how to take the next step:

Assess your current environment: Document what you have today: infrastructure, telephony, volumes, integrations, and pain points. Understanding your starting point helps you evaluate alternatives.

Calculate total cost of ownership: Add up all the costs of your current system over the next three to five years. Include staff time, infrastructure, telephony, facility costs, and planned upgrades. Compare that to cloud alternatives.

Identify your drivers: Are you focused on reducing costs, improving reliability, supporting hybrid work, or preparing for a data center exit? Clear priorities help you evaluate solutions effectively.

Engage with experts: Talk to providers who understand your industry and use cases. Ask about customer references, implementation timelines, and support models. Look for partners, not just vendors.

Build a business case: Quantify the benefits cost savings, risk reduction, improved user experience, and freed-up IT resources. Show stakeholders how cloud fax supports broader business objectives.

Plan your migration: Work with your chosen provider to develop a detailed migration plan, including timelines, testing phases, and success criteria. Set realistic expectations and celebrate milestones.

The organizations succeeding with cloud fax aren't necessarily the most technically sophisticated. They're the ones who recognize that infrastructure management isn't a core competency and that's perfectly fine.

Fax isn't going away, but how you manage it can change dramatically. Cloud fax solutions eliminate the operational burden of on-premises infrastructure while improving reliability, security, and user experience.

For OpenText™ Fax customers, the path forward is clear. OpenText Cloud Solutions deliver the capabilities you depend on with the scalability, reliability, and support that cloud enables. You're not learning a new platform, you're getting a better version of what you already know.

The question isn't whether to move to cloud. It's when to start and how to ensure success. With the right planning, support, and partner, your migration can be smooth, low-risk, and deliver value quickly.

Ready to explore
OpenText Cloud Fax Solutions?

Connect with an OpenText specialist to discuss your specific requirements and learn how organizations like yours are benefiting from managed cloud fax.

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