

# 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



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, however, 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 a new IDG MarketPulse survey of IT decision-makers, 76% of respondents say digital fax volumes have increased over the past two years, and 86% say the use of digital fax will continue to grow over the next two years. (See Figure 1)

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)

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

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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 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.

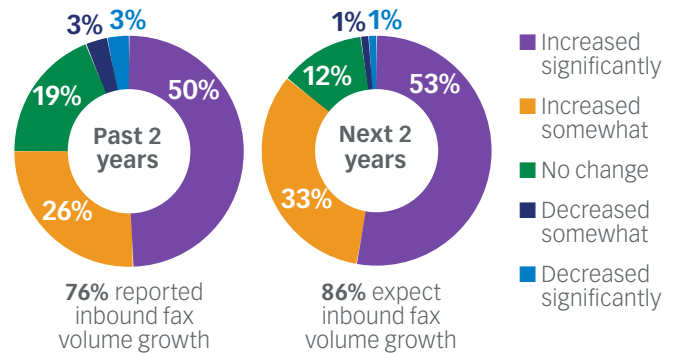
Even in fields where significant progress has been made, plenty of work remains. For example, financial content is most likely to be automatically captured and extracted: Fifty-two percent have mostly or completely automated the process. Yet, that percentage is barely more than half; 48% are still using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



Fig. 1 Digital fax is on the rise



SOURCE: IDG, JUNE 2019



Fig. 2 Challenges in processing fax-based content



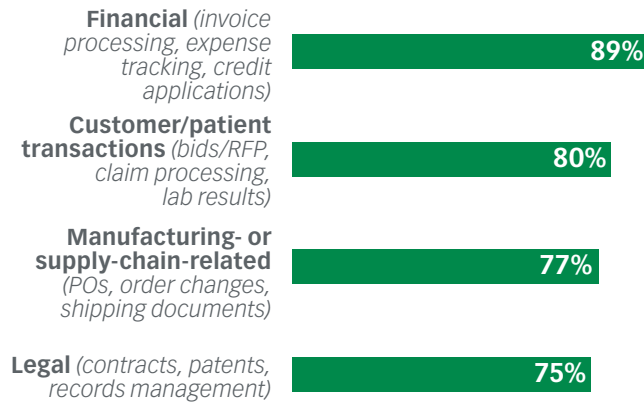
SOURCE: IDG, JUNE 2019

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.

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

SOURCE: IDG, JUNE 2019

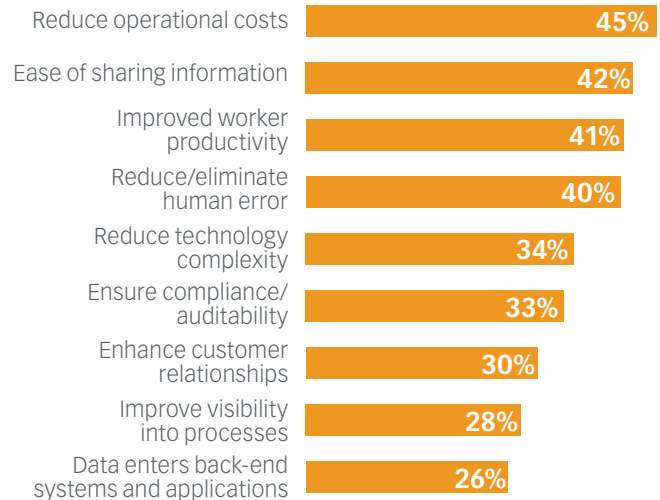
When asked which features their organization finds most important when evaluating technology that can improve fax-based processes, respondents ranked data security as first. In second place, scalability reflects the anticipated growth of the technology in the immediate future: the technology purchased 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.

#### • 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, respon-

**Fig. 4 Benefits of automated enterprise fax**

SOURCE: IDG, JUNE 2019

dents 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,

### 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.

## OpenText enterprise fax and capture solutions

OpenText capture solutions automate manual tasks such as keying and paper handling and consolidate input on a single management platform. They classify, extract, and verify information, applying a common set of business rules so that exception processing is reduced. The result is acceleration of business processes, leading to enhanced customer relationships. In addition, compliance risks are reduced because each incoming document is connected automatically to its appropriate business transaction.

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™ RightFax™** is enterprise fax server software that provides electronic, paperless faxing to and from desktop, email, and business applications.
- **OpenText™ Intelligent 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 fax and capture services

- **OpenText™ Fax2Mail™** is an enterprise cloud fax solution that provides electronic, paperless faxing to and from email, desktop, and business applications without complex hardware, software, or fax telephony.
- **OpenText™ Cloud Capture** is a cloud-based capture service for accurate, automatic data extraction and barcode recognition. This yields actionable information in digital form to automate fax and email document processing.

### Hybrid software + services solutions

- **OpenText RightFax with OpenText Cloud Capture**
- **OpenText Fax2Mail with OpenText Intelligent Capture**

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)

## 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.

**Visit us** to learn more about OpenText enterprise fax and capture solutions.