

# ELECTRONIC DOCUMENT DELIVERY:

How production fax and  
workflow software drive  
efficient document processing

A Lane Guide



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## Executive Summary

Managing and processing the flow of paper documents quickly and securely is a business critical challenge for most organizations. This is an increasingly important issue due to the sheer volume of data produced by modern business systems such as ERP, CRM, and many back-office solutions. Much of this information is produced in the form of documents that need to be efficiently and securely distributed throughout the organization and beyond.

The movement of paper documents – faxes, emails and other documents – creates opportunities for messages to remain inactive for long periods or even go missing forever. Inconsistent processes or inexperienced staff can cause costly errors, with business and revenue lost through delays or failures in executing these messages.

Businesses need to find more robust ways of moving these documents. Between departments and sites, or even across borders; sometimes collecting signatures on the way, often needing additional comments and notes. And in today's increasingly regulated world, transparency in this paper trail is vital to prove compliance and display validity of transactions.

This white paper looks at how companies can address these issues and shows how a powerful network fax server, such as Lane's Passport 4000, can be used, together with image-based workflow software, to manage, process and track messages and associated documents, from input to completion, through intuitive desktop user interfaces.

## Document Delivery: Challenges

Many businesses have invested in highly complex business information systems that are seen as vital in controlling business, managing operations and optimizing efficiency. The range of these systems, including ERP, CRM, and various back office process automation solutions has undoubtedly contributed to competitive advantage for those businesses that have invested in them. The volume of information handled by these systems can be vast and ranges from individual inter and intra-business communications to mass-produced documentation such as invoices, order acknowledgments and statements.

The challenge facing businesses that have these systems is how to ensure that the benefits derived from having them are not undermined by bottlenecks or insecurities in parts of the business not managed by them. Document delivery and receipt is one such area. Many enterprise applications simply do not handle this vital part of the communications process and as a result businesses often rely on an ad hoc collection of delivery



solutions ranging from sending paper documents by post and manual fax to email with all the delays, inefficiencies and insecurities that these methods entail.

The argument that manual processes are inefficient and costly will not be lost on those businesses that have invested heavily in automating as many processes within the organization as possible. In the hugely dynamic world we live in today with instant messaging and digitally connected communications networks, it is easy to forget that a very significant part of business interaction still takes place using traditional paper-based documents, and that these need to be transported from one location to another and then integrated into the enterprise workflow.

Traditionally, manual faxing was the solution employed by most businesses where speed of delivery and the need for delivery receipts were required. Manual fax achieved this but at a cost: it has always been time consuming for employees and therefore an inefficient way of sending large volumes of documents.

There was also the risk that confidential documents would end up sitting in a publicly accessible fax machine or that they would go astray on their way to the intended recipient. Even companies with fax servers optimized for general business communications often found that they were unable to effectively handle the volume of documents generated by their back-office systems. The result was often that IT administration overheads were higher than anticipated and manual intervention was still required.

Email, the most pervasive of communication technologies, clearly offers a solution to document delivery between businesses. But, there are a number of serious issues with email that weaken its use for business-critical documentation. Most serious among these is security as email can be accessed and documents altered or intercepted but almost as important are the administrative overheads associated with Spam, viruses, 'phishing' attacks, delivery confirmations, compliance issues and reluctance of recipients to open attachments.

## Document Delivery: Opportunities

Many organizations with highly sophisticated business management and back-office systems continue to diminish the potential benefits by failing to take advantage of the document delivery options available to them. Those that do address this issue gain significant competitive advantage. Companies can benefit from highly scalable production fax capabilities, automates document delivery and receipt, and provides effective workflow solutions.

## The Role of Production Fax

The most efficient and effective way of achieving high volume, low cost, real time document delivery is through a production fax solution such as Lane's Passport 4000 Fax Server.

Fax servers do much more than simply handle fax; they act as a hub for many business communications, integrating flows of documents from various network resources and distributing them in the required format. Data streams from back-office applications feed invoices, statements or any high volume business output into the fax server which then distributes them via fax, email, encrypted PDF, certified email, or even SMS, having formatted the documents onto appropriate business stationery as required. Effective integration of the fax server and applications is vital if efficient and reliable delivery is to be maintained.

## Fax and the Future

Some of the limitations of other delivery mechanisms, notably email, have already been touched on. Despite this, fax is often regarded as a dated technology that is in decline. It is important, therefore, to understand the role that fax plays in

a business context and to appreciate the advantages that it brings to the communications mix.

Lane is well placed to comment on the evolution of fax within the communications market having been involved as a vendor of messaging and document management systems for over 46 years.

The business has seen the strategic role of Telex and other wire services wane as fax became prevalent throughout the world providing cheap, secure, and legally recognized communications to virtually every business - irrespective of size or location. Lane's hardware based system, which was predominantly based on Telex and leased lines, gave way to the first release of their Passport Fax Server, then based on OS/2, which could manage both burgeoning fax traffic and integrate with e-mail as it became more widespread. Today, of course, Lane's Passport Fax Server has evolved significantly and is now the most powerful Windows-based fax server on the market.

The flexibility of e-mail as a communications medium appeared to signal the end of fax in the same way the fax had

ended the Telex era. Indeed, to the casual observer fax usage has declined as stand alone fax machines have been discarded and e-mail has seemingly taken over our lives. This perception is, however, some way wide of the mark. Sales of stand-alone fax machines have declined sharply in recent years but this is primarily the result of a shift away from stand-alone fax machines to Multifunction Peripherals (MFPs), which are fax servers with production fax capabilities and outsourced fax services. The reality is that fax usage is actually increasing year on year and is forecast to continue to do so.

It is clear, therefore, that fax as a communications technology has an important role to play in the foreseeable future. The growth in importance of production fax as a way of exchanging information generated from applications is driving the growth in the fax market. The ability of fax servers to draw together various disparate communications channels and to feed them with documents and messaging, from both cutting edge enterprise applications and legacy back-office systems, places them at the heart of evolving end-to-end document distribution infrastructures.



## Production Fax Delivers Competitive Advantage

A production fax capability is a vital component in an organization's infrastructure because it can have a significant impact on the performance of the enterprise as a whole. Low cost, real-time delivery, receipt of business critical documents directly to and from key business applications via fax, email or the Internet lowers operating costs, improves efficiency and strengthens trading relationships.

Specific business benefits include:

**Improved Business Performance** – As discussed above, the traditional ad-hoc mix of general purpose fax and email to deliver business-critical documents is just not robust enough for the modern business environment. The costs and delays inherent in manual processes, the additional hidden costs of delivery, the insecurities, the lack of management control and the inability to meet regulatory obligations combine to restrict business growth and impair profitability. Document delivery direct from desktop or back office applications via a production fax system addresses all these issues and dramatically improves business performance as a result.

**Lower Costs** – A very large part of the costs associated with delivering high volume documents, such as invoices, statements and purchase orders, generated by back office systems, is incurred in printing, labor, mailing and equipment overheads. A production fax capability eliminates the need to print or mail documents and results in very rapid return on investment.

**Compliance** – As regulation and legislation relating to data security and confidentiality becomes ever tighter, organizations are legally obligated to put systems in place that guarantee compliance. Accurate records, protection of data, storage and retrieval of comprehensive audit trails are virtually impossible without a centralized and controlled system. Production fax automates processes, reduces the number of paper documents in the business, enforces compliance, and provides end-to-end control including confirmation of delivery.

**Less Manual Intervention** – The production, distribution and processing of high volume documents happens faster and more efficiently with production fax. Business transactions are faster, more streamlined, and with fewer errors.

**Seamless Integration of Business Applications** – One of the key benefits of automating document delivery is that fax servers, such as Lane's Passport 4000, are exceptionally good at interfacing with a multitude of disparate applications ranging from the latest ERP and CRM solutions to entrenched legacy systems. They can do this through virtually any part of the communications infrastructure including email, fax, and SMS. Enabling applications to perform automated document delivery functions optimizes return on investment and improves management control.

## Conclusion

Many modern businesses have invested heavily in applications that automate business critical tasks, aid management and control production. These systems generate vast quantities of documents and internal information that must be distributed efficiently, reliably and securely. The need to comply with legislation is an added burden that can become unmanageable where paper-based documents clog up processes and become impossible to trace or monitor.

Fax server technology with production fax capabilities provides a centralized hub that can deliver a secure and efficient method of distributing documents directly from back office, ERP and business management applications. These applications dramatically reduce the amount of paper documents circulating within organizations while improving productivity, lowering costs, improving customer relations, reducing risk, satisfying regulatory obligations and creating a real competitive advantage for the business.





## About Lane

Since its formation in 1976 Lane has been at the forefront of messaging communications and is now recognized internationally as a leader in fax integration, across the financial, healthcare, manufacturing, and transport industries. Based in the UK, US and Singapore, Lane has implemented systems across 50 countries and provided professional services in all time zones.

Lane offers the very best solutions for integrating fax servers as a part of wider communications networks. As specialists in messaging solutions for over 46 years, Lane delivers seamlessly integrated fax and messaging systems across entire organizations and into consolidated data networks, across one site, many sites or across borders.



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