



DATA - Document Management and the

By Paul Serluco – Managing Editor

At its heart, document management is simply about information storage and retrieval. You file a document somewhere until it's needed, and then you get it.

"The reality, though, isn't quite that simple. In fact, for those in charge of managing paper faxes, it brings to mind the last scene in *Raiders of the Lost Ark*. You know the one. After Indy has turned over the Ark and been assured by the government that they have "top people" working on it, the shot dissolves to a crate on a forklift. As the camera slowly pulls back we see what looks to be thousands of other crates in a very dark warehouse. It's obvious that no one will ever see the Ark of the Covenant again", said Steve Adams, VP of Marketing for MyFax.

While e-mail may be the "killer app," the fact is that many industries still rely heavily on faxes to transmit data between two (or more) parties. Insurance companies, real estate agencies, mortgage brokerages, legal firms, and healthcare organizations are just a few of the many businesses that send and receive faxes in heavy volume, he said.

For example, one single real estate transaction might require 15-20 pages of faxes. Multiply that by the number of sales with which each agent is involved, and then by the number of agents, and the numbers become substantial if not staggering.

Almost all of these pages of faxes are regulated in some way, either through government entities such as the Securities and Exchange Commission (SEC), industry-specific regulations such as the Health Insurance Portability and Accountability Act (HIPAA), or general regulations such as Sarbanes-Oxley (SOX). Which means they all need to be stored somewhere, whether it is on-premises in row after row of filing cabinets, or off-site in your own version of the *Raiders* warehouse.

That's all well and good – until the day you need to locate and retrieve a fax sent three and a half years ago. Unless your paper filing system is absolutely pristine (and who has time for that these days), it may take a while to locate that critical document. In the meantime, valuable corporate dollars are being expended on the

search when they could be used for something more productive.

Some organizations have addressed the issue by scanning every fax that comes in and incorporating it into a digital document management system. That's certainly a better alternative to storing paper faxes, as it not only allows each fax to become electronically searchable but also protects the document against fire, flood, or disgruntled employees (assuming you have a proper backup system in place). Still, scanning each and every page of each and every paper fax is a resource-intensive proposition. Again, those are resources that could be redeployed into doing something productive, said Adams.

A better alternative to all of this is to eliminate the paper entirely and replace it with an Internet fax service. This type of service allows you to send and receive faxes electronically, either through your e-mail account or via a secure server that you access through an Internet connection. There are several advantages to this method from a document management (as well as resource management) standpoint.

Sending simplified

On the send side, faxes can be sent directly from your computer. You don't have to print it out, pick it up, walk to the fax machine, dial the number, and wait to see if it goes through. Of course, you can do that with a fax server too. The difference is, you don't have to be connected to the organization's network to send a fax. An Internet fax service works anywhere you can get an Internet connection, in or out of the office, making it ideal for mobile workers. Since the sent faxes are already electronic documents, they can be moved into a document management system with no additional effort.

Message received

The receiving side, though, is where an Internet fax service really makes the difference. Every page of every fax is received as an electronic document. Better Internet fax services allow you to

RAIDERS

of the LOST FAX

choose from a variety of formats, including PDFs and TIFFs, that can be easily integrated into your document management system with no additional handling. If you choose to have them come to your e-mail account, they are delivered directly to your desktop, whether that is in an office, at your home office or on your laptop on the road, as soon as you connect to the Internet. Otherwise, you can use that connection to access the secure server on the provider's site.

Eliminating delays

Every desktop efficiency expert will tell you that the key to productivity is to only handle a document once, i.e. see it, act on it, and file it. For many paper-intensive industries, though, that is not the reality.

Insurance claims are a great example. If the incorrect information is entered, or two pages go through the fax machine instead of one, the claim can't be processed and it is rejected or forwarded to someone else for further action. Once that happens with a paper document, it becomes very costly and time-consuming to resolve the claim.

Internet fax services help you avoid those delays, both by delivering complete electronic files and by making faxes easy to forward, even to multiple people when required, and easy to prioritize. An electronic document is much more difficult to lose, ignore, or delete. And if it is deleted, it's a whole lot easier to recover. The bottom line is you simply don't get the delays you would with a paper document – especially in those organizations that are processing documents in one office (or offshore) and making the decisions in another.

No more filing cabinets

If the fax is one you need to keep, it can be imported into virtually any document management system immediately, where it will be indexed and stored for later reference. Should you need to find it three years down the road, a simple keyword search will pull it up immediately instead of making you hunt through the filing cabinets like Indy looking for the lost Ark.

Improved security

Internet fax services have additional benefits as well when compared to other methods. Security is one. With a paper fax, you have to send the fax from a machine that is usually located in a public area, which means you have to stay with a confidential fax or risk having it viewed by unauthorized eyes. Worse, paper faxes coming in to that machine often sit for up to an hour, available for viewing to anyone who walks by. If someone does pick it up to deliver it, they normally have ample time to read it before dropping it at your desk. Not exactly the picture of best practices for HIPAA or SOX security.

Taking IT out of the equation

A fax server will solve the security issue, but it also adds a layer of complexity. Not only do fax servers have to be approved of and installed by IT, they are often very difficult to enable due to the nuances of fax transmission protocols. (There is a big difference between voice/data transmission and faxing from a technological point of view.) Internet fax services require no intervention from the IT department, as all of the technical aspects are handled by the provider, behind the scenes at their site. Sign up for the service, set up your account, and you're good to go.

Drive down costs

Finally, there's the cost. Internet fax services do not require you to purchase a special machine, additional telephone lines, or software, reducing the initial costs by 93 percent. There is no monthly cost for toner, paper, or phone lines, saving roughly 89 percent of those costs each month. There is no additional internal cost to maintain the systems. As long as you have an Internet connection you are ready to send and receive faxes anywhere you need them, for just pennies per day.

Simplify document management of your faxes by taking advantage of the benefits of Internet fax services. It sure beats leading a desperate expedition through the Valley of a Thousand File Cabinets. ■