

Document Imaging Report

Business Trends on Converting Paper Processes to Electronic Format

4003 Wood Street ● Erie, PA 16509 ● PH (814) 866-2247 ● <http://www.documentimagingreport.com>

June 26, 2015

THIS JUST IN!

BOX AND IBM TAKING ON ECM MARKET TOGETHER

There has certainly been a lot of talk over the past couple years over where file sync and share platforms fit into the ECM landscape. Two of the leaders in these respective markets, **Box** and **IBM**, this week announced a partnership that could go a long way toward defining the market's direction. The idea of the partnership is to combine Box's user friendly file accessibility with IBM's enterprise-class content management capabilities.

Specifically, IBM plans to integrate its capture, extraction, analytics (including Watson), case management (workflow), and information governance capabilities into the Box platform, which toward the end of last year was reported to have 32 million users—which is considerably more than the entire traditional ECM market. Box, of course, has famously struggled to reach anything close to profitability, but is attempting to rectify that by increasing its level of enterprise engagements. In its recently announced fiscal Q1 16 results (for the three months ended April 30), Box reported total billings of \$69.8M and 47,000 paying corporate customers. The billing figure represented a 58% YOY increase.

The partnership with IBM should further increase Box's enterprise business. The partnership will enable Box to "draw upon the specialized ECM skills of IBM Global Business Services professionals. Box will also be able to leverage IBM's enterprise security technologies in areas like "threat detection, anomaly identification, mobile device management, and identity protection." There will also be joint development on content management solutions for the IBM MobileFirst for IOS platform.

For more information:

<https://www-03.ibm.com/press/us/en/pressrelease/47185.wss>

EMC Shows Strong Focus on Document Imaging Technologies

ATLANTIC CITY, NJ—For several years, there have been questions about what is now known as **EMC's** Enterprise Content Division (ECD). The organization, which generated \$640M in revenue in 2014, consists primarily of EMC's ECM product lines. These include the Captiva, Documentum, ApplicationXtender, Syncplicity and Document Sciences software. Despite those large revenue numbers, ECD's revenue was actually down slightly in 2014 and down 10% YOY in Q1 '15 (including more than 20% in product revenue). With EMC's other five divisions all showing growth, many have questions about EMC's future plans for ECD.

No matter what those plans are though, it seems that ECD's future certainly holds quite a bit in the way of document imaging technology. ECD recently made two significant announcements that show it is embracing a document-imaging-centric future. First came the announcement of a new version of its Captiva document capture platform, 7.5, which includes upgrades in areas like ease-of-use, flexibility, and recognition. This was coupled with a new release of Captiva Mobile, v2.0. In addition, at the recent **MetaSource** National Partner Meeting held at the Borgata Resort in Atlantic City, EMC previewed a new release of its mid-market document imaging and management software platform ApplicationXtender (AX).

EMC throws support behind AX

After going several years without a major release, last year EMC released AX 7.0, in which the main improvement was the incorporation of a full-text search engine based on EMC's internally developed technology [see *DIR* 3/7/15]. AX 8.0, which is due out in October, features a slew of new features—including a vastly improved UI, a new set of RESTful APIs, and, for the first time since anyone can remember, a product roadmap for future releases.

"What has happened in the past 6-8 months with EMC is unprecedented," said Ed Mackin, Sr., whose company Mackin Imaging Systems merged with DSD to form MetaSource in 2007. "It's incredible what we've seen

with AX over that time period, and I've been working with the product since 1994. At MetaSource, we felt like kids on Christmas morning when EMC unveiled the new features in 8.0. In addition, EMC has significantly upgraded its marketing resources around AX. Who ever thought we'd hear marketing and EMC mentioned together when talking about AX?"

While Mackin sounds like he is being harsh on EMC for its support of AX, his opinion is based on experience. First Mackin Imaging and now MetaSource have served as master distributors of the software for more than 20 years. And while there are still several thousand installs and several hundred resellers of AX, there has been a market-wide opinion that EMC has somewhat neglected AX since it acquired the software with storage ISV Legato in 2003. [AX was originally created and came to prominence under the stewardship of OTG, which was bought by Legato in 2002].

"After today, I never plan to talk about what EMC has not done for the past five years [related to ApplicationXtender]."

—Mario Duckett, MetaSource

According to Mario Duckett, MetaSource's VP, Enterprise Content Solutions, it was when EMC changed the name of its ECM division from the Information Intelligence Group to ECD early this year that he began to see things start turning around. Rohit Ghai was named president of ECD and Chris McLaughlin the CMO. Both apparently have been long-time supporters of AX.

"Right after ECD was launched, they invited us to exhibit at EMC World," said Duckett. "EMC then asked if we could get partners to come to the event. I'll have to admit that we were hesitant because the first time we brought partners to EMC World, a number of years ago, we were embarrassed. There was no mention of AX, no sessions devoted to it. Our partners came away shell shocked."

This year was different. In fact, four AX resellers were honored with EMC partner awards. "Four years ago, we hired Mark Hanson, who had been one of lead engineers on AX dating back to its inception," said Duckett. "You knew things were tough because he didn't even really believe in what EMC was doing. But, Mark came back from EMC World this year saying, 'that was the best AX conference since OTG was having them.'

"There was a commitment by EMC to the channel that I had never seen before. There were discussions about growth opportunities within and outside of our borders. In fact, at the event, we developed four or five relationships with organizations outside the U.S. We think Europe could be our next big growth area and are working with EMC to stand-up

Document Imaging Report

Business Trends On Converting Paper Processes To Electronic Format

DIR is the leading executive report on managing documents for e-business.

Areas we cover include:

1. Document Capture
2. Image Processing
3. Forms Processing/OCR/ICR
4. Enterprise Content Management
5. Records Management
6. Document Output
7. Storage

DIR brings you the inside story behind the deals and decisions that affect your business.

Vol. 25, No. 12

Editor: Ralph Gammon
4003 Wood Street
Erie, PA 16509
PH (814) 866-2247
FX (412) 291-1352
ralphg@documentimagingreport.com



Managing Editor:

Rick Morgan
PH (814) 866-1146
rickm@scandcr.com

DIR is published 23x per year, on the 1st & 3rd Fridays of the month, by:

RMG Enterprises, Inc.
4003 Wood Street
Erie, PA 16509
PH (814) 218-6017
<http://www.documentimagingreport.com>

Copyright © 2015 by RMG Enterprises, Inc. Federal copyright law prohibits unauthorized reproduction by any means including photocopying or facsimile distribution of this copyrighted newsletter. Such copyright infringement is subject to fines of up to \$25,000. Because subscriptions are our main source of income, newsletter publishers take copyright violations seriously. Some publishers have prosecuted and won enormous settlements for infringement. To encourage you to adhere to this law, we make multiple-copy subscriptions available at a substantially reduced price.

Subscriptions: \$597 (electronic) or \$670 (paper) per year.

relationships with some resellers over there.

“Everyone at EMC ECD now knows about AX, seems to think highly of it, and understands where it fits in the ECM space. Chris McLaughlin, in fact, was presenting at the Global Partners Summit at EMC World when he ripped off his shirt to reveal an ‘I Love AX’ t-shirt underneath it.”

New HTML 5 interface & more

New features in AX 8 include an HTML 5 interface designed to enable cross-platform usability. “Because it’s completely HTML 5-based, this means it can be embedded in other browser-based applications,” noted Micah Byrd, a group product manager at EMC who took over management of AX in February. “The new AX viewer contains much of the same functionality as the legacy viewer, but we’ve made it a lot more intuitive to navigate.”

This has included greatly simplifying the toolbar. “The current viewer has like 50 buttons,” said Byrd. “Most people just use 10 to 15 of them. We had to make strategic decisions on how to clean it up. All the functionality is still there, we just buried some of it.”

EMC has also increased AX’s administrative and report generation capabilities. “We’ve also standardized on RESTful interfaces, which will enable AX to better scale across large enterprises,” said Byrd. “We’ve found that using SOAP and traditional APIs can create integration bottlenecks. We’ve improved AX’s single sign-on capabilities to help it cut across enterprise boundaries and created new image capture functionality that is based on top of Web services.”

Byrd also previewed some of the functionality currently being worked on for future AX releases. “In a release scheduled for Q2 or Q3 of next year, we plan to add more mobile functionality and continue to enhance the RESTful APIs,” he said. “There is a push within EMC to make all our products more mobile friendly, so in five years, when laptops and desktops are obsolete, we’ll still have viable software. We will also have an AX Workflow Manager update.

“For a release scheduled for the first half of 2017, we are going to focus on increasing user productivity and again on the UI. We also plan to introduce support for Microsoft’s Apps for Office, which will facilitate enterprise integration with Office.

“From a capture standpoint, we have talked a lot about where we want to take AX. Our Captiva product has historically been a very large product

[from a functionality as well as pricing standpoint], and we want to look at how we can streamline it and package it so it is more appropriate for AX users. The plan is to leverage Captiva to create a capture solution for AX that knocks that socks off everyone in the mid-market.”

Duckett added that EMC’s revelation of its future plans for AX been a huge confidence booster for MetaSource, its partners and their customers. “Now that we have a roadmap we can share, it removes a lot of obstacles we’ve had related to selling AX,” he said. “We now have the ability to really start pushing the product forward. After today, I never plan to talk about what EMC has not done for the past five years.”

MetaSource’s impressive growth

Not that MetaSource hasn’t been pushing forward even without the full support of its vendor partner. “Eight years ago, when I joined MetaSource, it was an \$18M company,” said Adam Östved, president and CEO. “Three years later, we started a partner conference to help accelerate our growth. At that time, we were doing \$6-7M annually in AX business and had about 40 attendees. This year, the conference has more than 100 attendees and we expect to do about \$15M in AX business.

“MetaSource is now a \$41-42M company, and a lot of our growth can be attributed to our unwillingness to ignore the AX world. Sales of MetaStor, our AX SaaS offering, are stronger than ever. In 2013, we were acquired by a private equity firm and that enabled us to execute an acquisition last year of Mortgage Compliance Advisors, which primarily performs audit services related to mortgage documents. Combined with MetaStor, this creates a powerful service offering.”

MetaSource has also increased its investments in sales and marketing, recently bringing on an experienced marketing professional in Colin Graf, who invited *DIR* Editor Ralph Gammon to speak at the partner meeting. In April, MetaSource added industry veteran Joe Waddle as its channel manager for the Western Region.

More mid-market growth

MetaSource’s impressive growth and EMC’s investment in AX is representative of the trend we observed last issue regarding growth in the mid-market for ECM. MetaSource and EMC teamed together make up a strong resource for document imaging resellers to rely on. I’ll have to admit, I have always been somewhat surprised with AX’s ability to maintain respectable market share, without a whole lot of support from EMC.

But, MetaSource has worked hard to keep the product alive and moving forward. Now that EMC (and its tremendous financial backing) is on board, AX is starting to look more attractive as an option for resellers addressing the growing mid-market space. It will be interesting to see how big MetaSource is at this time next year.

For more information:

<http://www.metasource.com/applicationxtender-8-0-launch-features-2/>

RESTful services highlight Captiva release

In addition to AX, MetaSource is a distributor for EMC's Captiva software, although, per Byrd's comments, it hasn't historically been the most reseller friendly product. That said, at the MetaSource event, I caught up with at least a couple resellers who have had some success with it, including Brant Poore, president and CEO of **Information Capture Solutions**, whose company was recently awarded a contract with a state department of revenue to implement a system for managing the front-end of its tax processing. This includes installing mail opening equipment, production scanning, automated forms recognition, automated capture (via Captiva), and check21 processing.

Justin Bettencourt, senior product manager at EMC, presented on the new Captiva 7.5, a couple weeks after I'd already done a briefing on the release with Raul Gabriel, a senior product marketing manager at EMC. The new version was released for GA last week.

One of the more exciting new features in Captiva are the real-time capture services. "They enable users to do real-time processing at the point of contact," explained Gabriel. "In traditional mailroom capture, you are relying on servers on the back-end. With our new real-time capture architecture, you are not hitting the server at all. All the processing is being done at the device or client level."

The real-time capture services leverage a RESTful architecture. "You hear a lot of analysts talking about a third platform," said Gabriel. "This has to do with the digital economy and information coming from mobile, social, and cloud platforms. The direction ECD is taking is that we need to position our products to be well entrenched in the third-platform realm and this is where the RESTful services come into play."

Basically, EMC has decoupled eight different processes from its Captiva server and created modules that can be run as individual services. These services can be run without documents hitting the server. That said, a Captiva server is

needed for log-in authentication and to manage document profiles. These profiles, or parts of these profiles, can then be executed in the real-time services.

The available services include image conversion, image processing, bar code recognition, OCR and PDF creation, document classification, data extraction, and validation. "It's basically the same code that's run on the server, but re-architected," said Gabriel. "It can sit in a cache and then be called on to perform processing. Because everything is being done on the device, whether it's a PC or mobile, this reduces latency, which is why we call them 'real-time services.'

"Validation rules can even be incorporated, such as making sure a number is formatted correctly. Once a user is satisfied that everything is done on a device, they can send it to a server for further processing. The real-time services are highly scalable—users can deploy them in a cloud, from which they can be downloaded to devices."

The real-time services are not the same thing as Captiva Mobile Capture, version 2.0 of which was announced along with Captiva 7.5. Mobile Capture focuses primarily on creating quality images from the cameras in mobile phones and tablets. "You're dealing with stuff like glare, uneven sides, trapezoids—stuff you don't have with a scanner and we've come up with special processes for handling that," said Bettencourt. "In version 2.0, the user can hover a camera over a document and Mobile Capture will automatically take the picture when the image is ready to be captured."

Mobile Capture can be integrated with the new RESTful services offered with Captiva 7.5.

Captiva 7.5 also features a new Web client to better enable distributed batch capture. "It's a replacement for the eInput product that we've had for a long time," said Gabriel. "The new Web client is based on our Captiva Cloud toolkit, so it can be connected to [many newer] scanners without any download. It can also be integrated with our real-time RESTful services."

EMC has also made quite a few improvements in the recognition capabilities in Captiva 7.5. This includes the incorporation of fuzzy-search expressions. "For example, now in a situation where the software recognizes a letter in what should be a phone number, it can automatically go to the most likely number," explained Gabriel. "This type of functionality helps reduce scripting and makes testing alternative OCR engines easier."

EMC has also made it easier to introduce new OCR engines into a Captiva application. “Historically, we’ve had a specific engine that was bundled with our advanced recognition technology,” said Gabriel. “If we had requests from other regions like Asia-Pac that might want to use language-specific OCR, it was difficult to accommodate. Now that we’ve decoupled OCR from our platform, it gives customers better options for integrating third-party engines.”

EMC has improved Captiva’s accuracy by expanding the data models it can work with, making it easier to remove lines and boxes from forms, and introducing text-based extraction for templating. It has also reduced the cycles needed for auto-learning. Captiva has also introduced a new document identification module that can be deployed within its Desktop application.

On the back-end, the Captiva server has been upgraded to 64-bit to enable processing of larger batch sizes—recommended maximum is now 500 MB.

Bettencourt noted that EMC is also ramping up its marketing around Captiva and has a lot of new white papers and literature available on capture technology and the market.

Entrenched in our market

As we indicated at the beginning of the article, we’re not sure what future holds for EMC’s ECD. It could be sold, spun-off, or continue to be run as a division within a \$25B company. No matter what happens, ECD is a large enough entity, with enough fresh investment in the document imaging market, that we expect it to be a major influence in our space for quite some time.

For more information:

<https://community.emc.com/docs/DOC-44618>;

<https://community.emc.com/docs/DOC-44686>

Ephesoft Continues Aggressive Pursuit of Capture Market

Since it was launched as an open source document capture software provider in 2010, **Ephesoft** has accelerated quickly. At its Innovate conference held in March, the Laguna Hills, CA-based intelligent document recognition (IDR) ISV announced that it had doubled sales in 2014 and was employing 62 people. The conference was held eight months after Ephesoft revealed it had received a strategic investment from **Fujitsu** [see *DIR* 8/1/14].

A couple of recent announcements would seem to indicate that Ephesoft has no plans of slowing down. First off, Fujitsu announced that it has added a new product to its Software Solutions portfolio, up till now made up of its PaperStream batch capture and image processing software [see *DIR* 1/31/14]. The new offering is “Advanced Capture powered by Ephesoft” and is an OEM version of Ephesoft’s Enterprise Edition for IDR. A day later, Ephesoft announced that it had hired long-time capture industry sales executive Richard Bosworth as its SVP, Business Development.



Richard Bosworth,
SVP, Business
Development,
Ephesoft

“A title like that can mean a lot of things,” admitted Ephesoft founder and CTO Ike Kavas. “Richard’s main focus will be making sure that our strategy is sound. He was instrumental in helping Kofax grow to a much larger company and did similar things with Notable Solutions. As we are growing and expanding, we wanted to have someone on board that has been there and done that.”

Bosworth joined Kofax as VP of sales in 1999, shortly after it had been acquired by Swiss hardware distributor DICOM. Prior to the acquisition, Kofax’s annual revenue was around \$40M. By the time Bosworth left eight years later, Kofax was generating about \$140M in annual revenue for DICOM.

In 2008, Bosworth joined **Notable Solutions, Inc. (NSi)** as its Chief Sales Officer. From 2009 until NSi was sold to **Nuance** last year, it reported a CAGR of around 40%. Bosworth stayed at Nuance for a year after the acquisition before joining several former Kofax colleagues at Ephesoft. Ephesoft CEO Don Field and EVP of Sales and Marketing David Talarico both worked with Bosworth during pretty much his entire career at Kofax.

“Both David and Richard will report to Don, with David continuing to focus on developing channel partners and Richard providing his overall strategy management expertise,” said Kavas.

Fujitsu deal no surprise

The Fujitsu OEM agreement was not a surprise, especially since Fujitsu launched a Solutions Group back in April leveraging several former KnowledgeLake employees. KnowledgeLake, which specializes in developing document imaging solutions on top of SharePoint, is a wholly owned subsidiary of Fujitsu. Last year, it signed an OEM agreement with Ephesoft, which was manifested in a product also known as Advanced Capture. Fujitsu’s

investment in Ephesoft was actually made through KnowledgeLake [see *DIR* 8/1/24].

Unfortunately, Jeff DeCarlo, SVP, corporate strategy, for Fujitsu Computer Products of America (FCPA), Inc., was out of the country and not available for an interview before our deadline (we were scheduled to talk this afternoon), but we did get Kavas' perspective. "Fujitsu is licensing the exact same Enterprise product that we sell," said Kavas. "But we believe Advanced Capture will be tightly integrated with their PaperStream Capture Pro software to create a seamless connection with their scanners."

FCPA is the leading scanner vendor in North America. It moves many of its scanners through document-imaging-centric VARs that Ephesoft is also trying to partner with for Enterprise. "The channel market is huge," said Kavas. "We know that we can't address all of it by ourselves. We only have a small piece of the pie right now and there is a lot left for a partner like Fujitsu—especially because so many resellers already work with them."

"In addition, about half our resellers come from the open source world. They are working with document management systems like **Alfresco** and **Nuxeo**. No one in the capture industry really has relationships with those types of resellers, including Fujitsu."

OEM deals multiplying

Fujitsu joins **ibml**, another leading document scanner vendor that signed an OEM agreement with Ephesoft in 2013 [see *DIR* 6/7/13]. Ephesoft also recently announced a couple new OEM partnerships with ISVs—**Infor** and **Nokavision**. Infor is a roll-up of multiple companies in areas like ERP, supply chain management software, HR, and CRM. To complement several of its ERP applications, it has introduced Infor Document Management, to which it recently added Ephesoft's auto-classification and extraction capabilities.

Nokavision is a Dutch-based document management solutions specialist that has incorporated Ephesoft's technology in a cloud-based invoice processing offering.

"Fujitsu is like any of our OEM partners in that it will be taking the first line of support for its Ephesoft-powered solutions," said Kavas. "Fujitsu takes a lot of pride in taking care of its scanner customers and will carry that over into software support."

For more information:

<http://bit.ly/FujitsuAdvancedCapture>;

<http://ephesoft.com/richard-bosworth-joins-ephesoft-executive-team>;

<http://ephesoft.com/press-releases>

Parascript Aims Classification at E-Governance

Auto-classification is one of the hottest buzzwords in the document capture market. Every ISV these days has an auto-classification product that can be used to identify similar groups of documents. But, what is the killer app? We've seen some success in areas like identifying document types within large mortgage files, but it doesn't seem like we've found that killer app yet. **Parascript**, the Boulder, CO-based recognition technology ISV, thinks it may be information governance.

"There is no question that auto-classification is an over-used term," said Greg Council, VP of marketing and product management at Parascript. "The use cases we've seen have been basically confined to identifying document types within a pre-defined package of documents. Typically, users know what they are looking for."

"We started down the road of enhancing our document classification technology to address that type of need. We have a software partner in France working on a contract conformity application. They basically have to ensure that a package of documents is complete so it can be considered a valid contract. This involves solving three primary problems: establishing that the right documents are there, identifying document boundaries (first and last pages—basically, document separation), and running rules to look for specific data."

"I'll admit that we were kind of weak with our auto-classification previously, but when we started addressing that application, we saw the opportunity to go beyond this type of use case. The broader market we think is information governance. Within that area, we fixated on two primary business problems."

"The first is the ability to control and manage documents within a records management (RM) system. Most current RM applications require that end users, people like subject matter experts or even file clerks and records managers, tag documents. However, in today's IT environment there are so many storage options that users will often bypass their RM requirements. This creates a real problem as organizations don't even understand what they have and therefore can't control it. Basically, if it's not tagged, it's not recognized by an RM application."

"The second problem is more closely related to ECM, and that is findability. This is related to not having a good taxonomy around documents and ensuring that they are all defined the same way."

Everybody has unstructured search engines in their ECM applications, but they still have trouble finding documents.

“Let’s take a credit union that we’ve been talking to. The loan officers and CSRs are having a real problem locating the documents they need to service customers during interactions. When this organization adopted its current document management system, all its documents were merged into it, but they are only classified by account numbers. So, if a customer wants information related a specific document, the CSR has to page through their entire file.

“They also have a warehouse of documents, and they don’t know what to keep as they transition to a new document management system. For example, they don’t know exactly which documents have value due to their being associated with existing accounts. They would also like to eliminate any duplicates.

“They are looking at employing six staff members to scan and visually look at each document to apply meta data. With auto-classification technology, if you set up proper rules, we think this should be able to be accomplished by a single person.”

Flexible technology and pricing

To address these types of needs, Parascript recently introduced Document Classification 2.0. “A lot of auto-classification technology utilizes just text,” said Council. “Our approach is to utilize text, as well as imagery, hand-writing, and really any visual feature that you can take into consideration. These factors can be utilized separately or combined, for which we’ve set up a proprietary voting algorithm.

“Also, there are two ways to approach auto-classification. One is through clustering, in which the system automatically creates groups of similar documents. This is best used when you really don’t know what you have, such is when you are trying to organize large file shares. The second is to train the system on samples. Both these approaches can be used in conjunction with extraction technology, such as our FormXtra technology.”

Document Classification 2.0 is being offered both as a standalone technology, as well as an option within FormXtra Capture 6.1. “We are still figuring out exactly how to package it,” said Council. “We are looking at pricing it through a pay-as-go model, based on volumes. Users won’t have to purchase a perpetual license, because many companies want to take on classification on a project basis. We plan to offer this model as both an on-premise solution and a hosted cloud service.

“One of the complaints we’ve heard about current auto-classification is that it has missed the mark because it’s overly complex or too expensive or both. We are going to address this.”

Said Parascript VP of Sales Mark Gallagher in a press release, ““We’re placing the power of document auto-classification in the hands of business users. On the one hand, you don’t have your team spending hours manually reviewing and organizing documents in the system. On the other hand, you don’t have to employ a team of programmers to auto-classify your documents.”

Market catching up to technology

Council added that increasing use of file sync and share applications like Dropbox and Box has created the perfect storm to drive demand for auto-classification. “We did an intro of Classification 2.0 at an ARMA event, and I was talking to a number of companies that have ECM applications; they all seem to be having the same problem,” said Council. “The longer these systems are in place, the more they start to drift. Eventually, these organizations lose control and their repositories become a mess.

“We think with Classification 2.0, we can clean this up through an automated process—not just for backfiles, but for new document streams as well. On top of that, in addition to Box and Dropbox, you have SharePoint, which really started this trend of people dumping documents into file shares outside their ECM systems. And it’s not just document images that our technology can be applied to. Classification is classification. In one engagement we are being asked about working with e-mails.”

For more information:

<http://bit.ly/ParaDocumentClassification2>

Digitech Demos New Capture Technology

COLUMBUS, OH—Earlier this month, I had the opportunity to attend **Cranel’s** annual North American Executive Partner Event. There were more than 100 people in attendance, including reseller partner and vendor representatives, as well as Cranel employees. During the technology showcase at the event, I sat down with Platinum sponsor **Digitech** and saw a demo of its new capture technology.

In the past year, Digitech has actually introduced two new capture technologies—Forms Magic, its new auto-classification engine [see *DIR 4/11/14*] and its Business Rules modules for documents in specific

markets or processes [see *DIR 10/10/14 and 4/10/15*]. At NAEPE, Digitech demonstrated Forms Magic used in conjunction with its Business Rules for A/P.

Forms Magic was used to separate a batch of invoices into those from specific vendors. The fields to be captured were then highlighted on each vendor's invoice. All this information was kept in memory so that going forward Forms Magic would automatically capture the desired fields.

Once the extraction was done, the forms were released into PaperVision Capture where rules were applied. This included adding together information from line items with freight charges and taxes to see if they matched the total. If the information does not match (it can also be compared to PO information imported from an accounting/ERP system), it can be kicked out into an exception workflow within PaperVision.

Currently Forms Magic and PaperVision Capture are run as separate applications, but plans call for them to be more tightly integrated in the future.

Paul Owens, senior sales engineer at Digitech, explained that one customer has leveraged Forms Magic to reduce by 25 minutes the time it spends processing a sales contract. "These contracts are varying length and basically constructed as blocks of text," he said. "Forms Magic is being used to extract the contract number as well as the items that have been purchased."

For more information:

<http://www.digitechsystems.com/products/papervision-capture/>

EXPLORING ECM TRENDS

ANNAPOLIS, MD—*DIR* Editor Ralph Gammon recently moderated a technology panel at the QAI and DocPoint 7th User Conference. Sitting on the panel were John Burton, CEO of **Nintex**; Paul Carman, president and CEO of **Xamcor**; Pat Park, regional VP, public sector, **Metalogix**; and Rick Churchville, Mid-Atlantic territory account manager for **Kodak Alaris IM**.



The event was attended by approximately 100 people, mostly a cross-section of federal government employees, contractors, QAI/DocPoint vendor partners, and employees. The content and conversations reflected QAI/DocPoint's business mix of document capture and SharePoint solutions. **AIIM** President John Mancini presented on the future of ECM, while DocPoint VP of Sales Mike Ratigan and SharePoint Architect Olivia Stewart spoke on the importance of getting input from both IT and business users when developing SharePoint implementations and then moving forward with agile development practices. **Microsoft's** Scott Thompson discussed strategies for effectively leveraging the cloud.

As usual, the event ended with a sailing excursion on the Chesapeake Bay, for which the weather was perfect. QAI Principal and DocPoint President Scott Swidersky was a gracious host and did a great job mixing business, networking, and recreation.

Subscription Order Form for RMG Enterprises, Inc.

4003 Wood Street • Erie, PA 16509 • Phone (814) 218-6017 • e-mail: ralphg@documentimagingreport.com

Document Imaging Report

Business Trends on Converting Paper Processes to Electronic Format

1 year (24 issues)

- electronic copy @\$597
- paper copy @\$670

SCAN: The DATA CAPTURE Report

Premier Management & Marketing Newsletter of Automatic Data Capture

- electronic copy @\$597
- paper copy @\$670



Name _____ Title _____

Company _____

Street _____

City _____ State _____ Zip _____

Phone (____) _____ Fax (____) _____

E-Mail _____

Please enter / renew the following subscription.
(Add \$33 on all orders outside of Canada and the United States.)

Payment Enclosed (Remit to: RMG Enterprises, Inc., 4003 Wood Street, Erie, PA 16509)

Charge My Credit Card (Charge will appear as RMG Enterprises.)

____ AmEx ____ Visa ____ MC ____ Discover _____ card number _____ expire date

Bill My Organization (Purchase order # optional.) _____