

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>

October 12, 2012

THIS JUST IN!

TABS LAUNCHES SOLUTIONS-FOCUSED UNIT

"Services" is certainly the buzzword in the MFP market today. Over the past few years, we've covered initiatives by vendors like **Ricoh** ("a services-led, product-focused company," see *DIR* 6/22/12), **Canon** (launches Information and Imaging Solutions subsidiary, see *DIR* 5/20/11) and **Lexmark** (acquires **Perceptive**, **Brainware**, and other software vendors, *DIR* 2010-2012)—which are designed to move MFP vendors away from hardware and toward selling more solutions.

Toshiba is certainly not last to market in this respect. Two years ago we covered TABS' (Toshiba America Business Solutions) launch of a Professional Services Group [see *DIR* 11/5/10]. Recently TABS took that initiative to the next level and announced a new Managed Business Services (TMBS) unit. TMBS will be supported by the TABS infrastructure, but will operate as an independent organization with its own staff.

TMBS will focus on enterprise sales in four primary areas:

- Managed print services
- Document security, workflow/capture
- Barcode systems
- Digital signage and kiosks

"We still see MFPs as an area of opportunity, even though it's characterized as a flat or declining market by most standards," said Bill Melo, VP, marketing, services and solutions general manager for TMBS. "The U.S. MFP market is still worth \$21 billion. But, we also see strong opportunities in adjacent areas like managed print services (MPS) and document solutions, as well as digital signage and bar code printing."

According to Chris Applegate, director,

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Scanner Sales Up 7% in 2011

While the document scanner market grew in 2011, it did not increase at the level that had been projected. According to Susan Moyses of **Moyse Technology Consulting**, who recently published her annual market forecast and analysis, total unit sales in the U.S. and Canada were up just 7% in 2011, with revenue increasing only 2%. Last year, after reporting 14% unit sales and 7% revenue growth for 2010, Moyses was projecting an 11% CAGR for the five years 2011-2015.

"I think the poor economy has had a large effect on scanner sales," Moyses told *DIR*. "We were on a pretty good growth trajectory when the worldwide economy went south in the second half of 2008. 2009 was the only year we had negative growth, but the market is growing at a much slower rate than it was prior to 2008. [For details, see chart on page 3.]

"I don't think the market has reached a plateau. We haven't sold into all the places there are to sell scanners. There is still so much paper and so many people who have yet to integrate their paper effectively into their business processes. Hopefully, when the economy gets back on track, we will see a nice boost."

Historically, Moyses has focused primarily on the U.S. and Canadian markets, but in the past few years has integrated worldwide numbers into her reports. For 2011, she reports that 1.6 million units were shipped worldwide, which represents 11% growth. "The U.S., Canada, and Western Europe used to represent almost the whole market, but that is shifting. We are seeing increasing sales in developing regions like Eastern Europe, China and AsiaPac, and Latin America," said Moyses.

Moyses breaks down the scanner market into six segments with high-volume production (HVP) models (scanners rated at more than 100 ppm and priced at more than \$30,000) at the top and personal models at the bottom. Her minimum requirement for a document scanner is that it has an automatic document feeder. Moyses does not cover MFPs, but does break out network scanners as a separate item (in addition to

including them in her “departmental” segment).

In 2011, Moyses reports that the HVP segment had a surprisingly good year. “Because there are so few units sold at the high-end, the HVP segment has its peaks and valleys,” Moyses said. “Overall, it’s been on a downward trajectory. Increased implementation of distributed capture has certainly contributed to this. That said, the HVP segment can be kind of hard to predict, as it typically involves long sales cycles, and sometimes a number of large deals come together at the same time.

“In 2011, we saw a 20% increase in HVP units sold in the U.S. and Canada. This was coupled with some price declines, as vendors like **Kodak** introduced lower priced, higher speed models. Even so, we saw a 10% increase in revenue for the HVP segment. Kodak and **IBML** are the major players, and they both had good years. The nice thing about the high-end is that sales typically include professional services and/or maintenance contracts that increase overall margins.”

On the low-end, while the personal segment (under \$750) struggled, showing flat to negative growth, the desktop workgroup (\$750-\$1,500) and departmental (\$1,500-\$4,000) segments continued to thrive. “The desktop workgroup segment was up 20% and is the largest segment in North America with approximately 300,000 units sold in 2011,” said Moyses. “The departmental segment was up 8% with approximately 200,000 units sold.”

Fujitsu is the leader in both these categories. “Fujitsu leads in every category it competes in, except network scanning (where **HP** leads),” said Moyses. “Fujitsu owns pretty much half of everything—this includes revenue and units sold.

“Fujitsu has always had a very narrow focus on being a leader in this market. To a lot of vendors, their document scanner business is just a drop in the bucket. But, Fujitsu really focuses on its scanners. They have a great channel and great marketing and are very forward thinking and innovative in their products.”

Moyes noted that **Epson** and **Canon** also did well in 2011 and expects multiple vendors to gain in 2012 at the expense of Kodak, which she feels will be hurt by the uncertainty surrounding its business. “Kodak was in damage control the first couple months of the year after Kodak corporate announced its bankruptcy filing,” she said. “Then, there was some optimism when it seemed like Document Imaging was saved. But, now with DI being put up for sale, there is more uncertainty.”

What the future holds

Overall, Moyses has projected a CAGR of 9% for unit sales in the U.S. and Canada for the five years 2012-2016, and a 5% CAGR for revenue. In addition to the economy improving, she said that capture software applications must become easier to use to drive more hardware sales. “I’ve always complained about document scanning software being way

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

Areas we cover include:

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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.

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

Managing Editor:

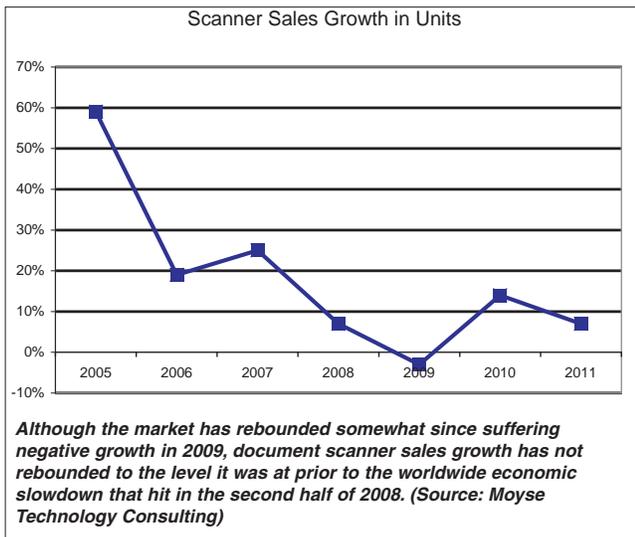
Rick Morgan
PH (814) 866-1146
rickm@scandcr.com

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too complex,” she said. “I think some of the new scan-to-cloud apps are great, because they will help small to mid-sized businesses and people who are less computer savvy get into the market in a way that is simple and doesn’t require a large upfront investment.

“In addition, we are seeing a younger generation coming into the workforce that is more computer savvy. They will likely be taking more advantage of technology than the people they are replacing.”

Moyse stands by the capabilities of dedicated document scanners in the face of increasing competition from devices like MFPs and mobile phones. “The scanner vendors have done a good job creating robust products that capture images the way they need to be captured the first time through,” she said. “I don’t think MFP vendors have quite gotten that right. The scanner vendors have a great case for their products, but they aren’t always effective at stating that case when competing against MFPs.

“And while I agree that scanning from MFPs continues to increase, I’m not sold on the potential of mobile document scanning. While I think it’s a viable market, I just don’t see it as having the huge effect that many say it’s going to have. I can see some applications and business opportunities, but I don’t think there is going to be massive adoption.”

For more information: <http://www.moysetech.com/>; susan.moyse@moysetech.com

Please follow us on Twitter @DIREditor for daily updates on breaking news. Recent Tweets have mentioned the **Artsyl-DocStar** partnership, **TIS** being included by **Océ** in an MPS deal worth a total of \$5.6 million annually, and **Kofax** landing a \$600,000 deal with **Telecom Italia**. Also, visit our blog at <http://documentimagingreport.blogspot.com/>

FlexiCapture Engine Features Set-Up & Mobile Upgrades

It’s sound strategy for SDK vendors to stay ahead of the market. After all, before their software is adopted, it is first typically integrated into another software product. This delays the time it reaches end users by approximately a generation.

ABBYY is doing its best to stay ahead of the adoption curve with the latest release of its FlexiCapture SDK for automated document capture. With FlexiCapture Engine 10, ABBYY has introduced new features that help the SDK address the emerging mobile and SMB document capture market segments. This includes bundling its mobile tools and introducing a new WYSIWYG interface for setting up capture and classification parameters.

“Like you see with most other technologies, document capture is being pushed down from the enterprise into the mid-market and SMB levels,” said Scott Thompson, senior product marketing manager for ABBYY USA. “In addition, ABBYY agrees with **Harvey Spencer Associates’** projections that the market for ad hoc transactional capture software is coming into its own. We’ve had success in the batch capture market with invoices, but we’re now seeing where end users want to go next.

“A lot them are looking at capturing receipts, drivers licenses, passports, and other small form factor stuff. In many cases, a smart phone may prove to be the best hardware to initiate business processes involving these items. ISVs have to develop products to address this trend.”

Combining mobile and batch

According to Thompson, FlexiCapture 10 offers the best of both worlds when it comes to combining mobile and traditional batch capture. “ISVs are not looking for SDKs that do either batch or mobile capture—they want to integrate to one API that can handle both,” he said. “They need a robust client on the phone that do can the initial clean-up and make sure an image is okay. Our mobile technology includes proprietary algorithms for processes unique to mobile phone capture. These include keystone effect correction, auto-edge detection, and shadow removal.

“On the server-side, ISVs need software that can leverage greater CPU power to produce more accuracy. They also want to connect to back-end applications, because no matter how great the entry point technology is, it’s not much use unless you can deliver your images to a business process. The FlexiCapture server can couple any image with the

required data and connect to another system by outputting a JPEG or TIFF with an XML file or a PDF with meta data. It's a very flexible engine."

Simplifying set-up

For capturing data from images with the FlexiCapture Engine, ABBYY has introduced a new method for creating document definitions. "Historically, we've relied on the user to create traditional templates, supplemented by rules," said Thompson. "With the latest version, we've introduced a WYSIWYG, or visual, interface that enables rules to be built in the background.

"Basically, we've automated the creation of document definitions. A user simply brings up an image and clicks on the fields they want to capture. For example, to capture data from a W-2 form, they'd set up a list of fields like 'earnings,' 'taxes,' etc. They would click on each field and then the spot on the image where the corresponding data lies. This set up is done with a sample set of documents.

"In the background, the FlexiCapture Engine would be building a set of expressions and patterns to look for, as well as reference points. The number of samples needed varies based on the complexity of the document type. Once the training of FlexiCapture is complete, the software acts like a black box capture system. Users can also set up an exception folder that can be used to retrain the system, so it should become more effective over time.

"In the past, we think the set up of FlexiCapture was a barrier to entry because people had to learn how to use our proprietary FlexiCapture Layout software. With the new version, we wanted to enable end users to quickly build production-level data extraction systems. Of course, for more complex projects, they can still take advantage of all the rules capabilities that we've always had."

Thompson said that the learn-by-example capabilities can also be utilized for document classification. "Basically you set up a folder for a particular type of document, like invoices, and then move some training documents into that folder," he said. "The system will absorb the patterns and use them in its classification process."

Enabling cloud capture

A final improvement that has been made in FlexiCapture Engine 10 is that it is more cloud-ready. "We are not hosting the SDK ourselves, but our customers certainly can," said Thompson. "Essentially, that is what **Intuit** is doing to enable its tax forms processing services [see [DIR 4/22/11](#)].

"To enable this, it's important to have a system that can quickly spin up new instances to handle one or a few images at a time. Traditional capture SDKs have been designed more for high volumes captured in batches. We made some changes in our architecture so that FlexiCapture Engine 10 is better able to spin up 100 instances or more, each to handle an ad hoc transaction, and then shut down in a way that optimizes cloud resources."

Thompson concluded that ABBYY is entering some uncharted waters as it evolves FlexiCapture Engine to succeed in a changing market. "In some ways, capture is becoming a very mature market," he said. "A lot of ISVs already have established relationships with their SDK vendors. We think the capabilities we've added in FlexiCapture Engine 10 can bolster the capabilities of ISVs already licensing capture technology."

Thompson added that ABBYY has also had to consider pricing adjustments to handle mobile applications built on its technology. "Mobile and cloud models can turn traditional pricing on its head," he said. "Historically, capture pricing has been based on page counts and CPUs being utilized. However, in mobile capture, while the page count is lower, the value of the transactions tends to be much higher. We have to consider models like taking a percentage of the revenue generated from each download to a smartphone. That seems to make more sense than charging per image."

For more information:

http://www.abbyy.com/News/ABBYY_Announces_FlexiCapture_Engine_10_SDK/

Mitek Sues TIS over Mobile Capture Patents

Mitek Systems has gone on the offensive regarding its mobile image capture patents. Late last month, the San Diego, CA-based ISV announced it had filed suit against **Top Image Systems (TIS)** for infringement of five patents. According to a press release, the patents in question, "all generally relate to mobile image capture and processing using a smartphone or tablet."

TIS is a Tel Aviv, Israel-based ISV, which earlier this year announced a suite of mobile products covering the capture of checks, payments, and documents. TIS is publicly traded on the Nasdaq, and for 2011 had annual revenue of close to \$29 million. Historically, TIS has done most of its business in Europe, but it recently opened a U.S. office to market its mobile technology to the North American financial sector.

Mitek has been in the mobile capture market since 2008 [see *DIR* 2/1/08] and in 2010-2011 was issued five patents related to “mobile image capture and processing.” They clearly contain wording about processes like auto-cropping and binarizing, as well as transferring images to a server. This is the type of technology I have seen included in almost every mobile capture app demo.

Why Mitek chose to go after TIS as opposed to **Kofax**, **ABBYY**, or someone else is unclear. It could be that Mitek feels TIS’ relatively small size makes it more likely to settle, and a settlement would help Mitek’s credibility when it comes time to go after larger players. TIS has said it will “vigorously defend” against Mitek’s suit.

Of course, Mitek is already engaged in a legal battle with financial services and insurance giant **USAA**, which is a licensee of Mitek’s recognition SDK and has sued Mitek over the mobile capture patents. The way I understand it is that Mitek attempted to bill USAA for utilizing Mitek’s patented mobile capture technology, a bill at which USAA balked. USAA then turned around and accused Mitek of stealing and patenting USAA’s technology. At last sight, Mitek had filed a defamation and unfair business practices lawsuit against USAA.

What Mitek stands to gain

So, why is all this important? Well, **Harvey Spencer Associates** has predicted that the mobile capture market will be worth some \$1.5 billion in a few years [see *DIR* 12/16/11]. It seems that every vendor in the document imaging industry has at the very least discussed a strategy for mobile capture. Well, it just so happens that these Mitek patents, at least the way I’ve read them, cover most of the core technology related to mobile capture. If they hold up in court, Mitek could be in line for a lot of licensing payments from ISVs in this industry.

For more information:

<http://www.miteksystems.com/about/patents;>

<http://www.miteksystems.com/usaa-litigation;>

<http://www.topimagesystems.com/>

Datamark Implementing TIS eFlow

Datamark, which specializes in document-driven BPO (business process outsourcing), has licensed **Top Image Systems’** (TIS) eFlow capture software. Datamark has traditionally developed its own capture. It is counting on eFlow to help it reduce its development efforts and improve its agility.

“We’ve spent quite a few years developing our in-

house software application for data entry,” said Max Aguilar, Datamark’s director of technology and software development. “We’ve utilized commercially available tools for OCR and some other elements of recognition. Our model has been to license tools and apply them as they best fit each unique customer.

“Our new approach is to utilize an end-to-end product like eFlow. This should reduce our software engineering work. It also should streamline our time-to-market. eFlow should help us when we are ramping up a new customer, as well as expanding services to existing customers.”

Datamark, which is based in El Paso, TX, primarily services Global 500 entities. It advertises services related to a number of different document types in markets like healthcare, transportation, and finance and accounting. “Because of the type of clients we have, our service will often be utilized in up to 10 different areas—each with its own priorities and processes,” said Aguilar. “For the same customer, we might be doing work for the marketing, compliance, and product groups.

“There is certainly a lot of variation and different document flows among those groups. We were looking for an agile application that can be changed quickly to address different requirements. In addition, we wanted to be able to bring innovation into our platform and to our customers. Our services are not just about providing labor savings. They are also about providing our customers with intelligence about their documents that they didn’t have previously.”

Datamark has its own document scanning facility and also operates at customer sites. “We do facilities management where we basically manage all of a customer’s incoming mail for them,” said Aguilar. “We convert their paper and do recognition, data entry, and validation. We try to get our system to do as much as possible and then deliver the data and images to our customers. If it’s an A/P process, we might include some approval capabilities.”

Datamark was looking at several “bigger name” capture products when it was introduced to eFlow. “I had never heard of it,” said Aguilar. “But, once we saw the demo, we knew that eFlow was what we wanted.”

Datamark is purchasing the software through **TransCentra**, which is the organization that now operates J&B Software—the primary U.S. reseller of eFlow [see *DIR* 4/6/07]. TransCentra also operates a large payment processing outsourcing service, formerly known as Regulus, but the partnership

doesn't mean TransCentra is merging with Datamark or anything like that. "Basically, we started negotiating with J&B for eFlow and just continued that relationship when it became part of TransCentra," said Aguilar.

And, although the press release discussing Datamark's partnership with TransCentra says that eFlow "will be available to Datamark customers," that merely means as part of Datamark's services. "We are not a reseller of capture or ECM software," stressed Aguilar. "Our initial plan is to implement eFlow at our El Paso facility, and we have another customer who we are talking with about implementing it on-site in their mailroom.

"Our model is that we will run eFlow on our infrastructure. The plan is to lift and replace our technology, so it is as transparent as possible to our customers. In some cases we are using our client's technology, so it may be more complicated as we may have to change some processes.

"We have a number of in-house engineers who have already picked up on the eFlow platform. My hope and plan is to actively build our relationship with TIS. Unlike most of TIS' clients, who may only be automating a single process, we are working on multiple processes for multiple clients every year. We will feed TIS our roadmap, which should help it develop features that will benefit both of us."

For more information:

<http://tinyurl.com/TISDatamark>; www.datamark.net;
<http://www.transcentra.com/software/eflow/>

Xerox Develops Innovative Distributed Capture for Banks

Last issue, we did a story about a company called **BeyondRecognition** converting text on scanned documents into glyphs to make the documents searchable. While **Xerox** isn't quite doing that, it is doing something similar involving capturing text, but not applying traditional OCR/ICR to it. Xerox is currently rolling out a solution involving this alternative form of capture for a large bank in India.

DIR caught up with Nischal M. Piratla, Ph.D., a senior entrepreneur in residence at the Xerox Research Centre India. He provided details on the new distributed capture solution, which utilizes MFPs running Xerox's EIP (Extensible Interface Platform) to connect to a Web server application for capturing forms. Plans call for the solution to be rolled out at thousands of bank branches in rural India.

"The Indian government is encouraging citizens to open bank accounts," Piratla told *DIR*. "As part of this initiative, it has issued a mandate that banks must have at least 20% of their branches in rural areas. So, there is an increase in the number of people opening new accounts at rural banks throughout India.

"To open an account in India requires substantially more documentation than anywhere else I have lived. You need proof of ID, proof of residence and a mailing address, proof of income tax, and an introduction letter from an employer. All this paperwork has to be cross-checked and an application form filled out. There is also a requirement that banks keep paper copies of signed application forms for six years."

Currently the most common way of processing the paperwork for new accounts involves shipping it via courier to a central bank where it is reviewed. "Using this process, it takes two to three days before an application can be validated, and if the paperwork is incomplete, information has to be communicated back to the branch, which then has to reach the customer," said Piratla. "Scanning all the documentation and sending it electronically to the central bank is out of the question because of the unreliable satellite networks typically used in rural areas. They just can't support transferring the large files multiple images would create."

How it works

Utilizing the new EIP-based system, which is currently in beta testing, can reduce the validation time for opening an account to 30 minutes. "We've configured EIP to run in IE, and a keyboard and mouse can be used to enter data into an electronic application form," said Piratla. "The form can also be printed and filled in by hand. This is necessary because many times agents from rural banks visit customers at work to have them fill out paper forms that the agents bring back to the branch."

Once the paperwork is completed, it is scanned. "All the validation is done locally," said Piratla. "All supporting documentation is validated and indexed. If any of it is missing, the process can be suspended and, when the trailing documents arrive, restarted at the same place."

On the new account form, all fields are checked to make sure data matches the proper formats. "For example, if a date field should be formatted DD/MM/YY, we can check for that construction," he said. "We also check the business logic."

When everything is in order, the data is lifted from the application form and transferred to the central

bank for processing. But, it's not done using character recognition. "Because we design the forms, we know exactly where the data fields are, so we can cleanly lift the text from a scanned form," said Piratla. "We losslessly compress the data being transmitted so it's about a 1 KB file we are sending."

The data is reconstructed and used to populate an electronic form on the other end, where it is read and keyed. According to Piratla, it would be cost prohibitive to do the keying at the rural branches. "The low volume of transactions at rural banks means they have to run with a minimal investment," he said. "It's our goal to help create cost efficient branches."

The paper is eventually sent to the central bank for storage. "But the approval process can now be completed well ahead of the paper arriving," said Piratla. "This should also help banks reduce the number of courier runs they are making to once a week or a month, which will also reduce branch operating costs."

Not lost in translation

The ability to lift and transfer field data is also beneficial for handling the multiple languages used throughout India. "Most people in India know how to write their name, address, and other vital information in English," said Piratla. "But, many of them can't read any other English. So, even though they might be able to complete an application form in English, which is the language used by the bank, the form itself has to be presented in their native languages."

"To accommodate the wide variety of languages, branches have historically placed a laminated template in the customer's language over the paper form. Since the Xerox system is only sending the filled-in data to the central bank, it can create a paper or electronic form in whatever language is needed."

Piratla noted that the capture project is an example of what can be accomplished when Xerox's product and global services (the former ACS) divisions work closely together. "We are initially focusing on account openings because that's the biggest current need," he said. "But, we're discussing expanding the system to process different types of loans and term deposits, which also require forms. Internally, there are daily reports that branch managers have to submit as part of their audit requirements—that can also be run through our system."

"We see opportunities in other countries where rural branches are being closed because they are too costly to run, partially due to the costs of

processing paperwork."

Finding the paper

It's quite clear that even as the use of paper diminishes in more technology advanced areas, it remains a significant bottleneck for business processes in developing areas. Not surprisingly, Susan Moyse points to developing regions as the biggest growth area for document scanner sales [see story on page 1]. We've also seen emerging new data capture players like **Captricity** focusing on developing markets [see *DIR* 8/10/10].

The bottom line is that paper remains the least common denominator when it comes to sharing information. And in markets that have to make do with less, like countries with less developed economies and the SMB (even in more developed regions), there is still a lot of paper being used. This translates into opportunity for innovative document imaging vendors and resellers.

For more information:

<http://tinyurl.com/Xeroxdistributedcap>

Atalasoftware Releases Java SDK

Atalasoftware has released a new flavor of its SDK aimed at Java developers. JoltImage will complement the **Kofax** subsidiary's legacy document imaging SDK—DotImage, which targets ISVs who have built their platforms in .NET environments. According to Lou Franco, VP of product strategy for Atalasoftware, JoltImage doubles the company's potential market size.

"Now that we've reached a certain size, to achieve the level of growth we want to see, we needed to expand our focus beyond just .NET," Franco told *DIR*. "Java essentially doubles the number of developers we can sell to. I don't expect our sales to double overnight, but JoltImage provides us with a second runway."

"More importantly, this enables our software to work more effectively within the broader Kofax framework. Part of the reason Kofax acquired Atalasoftware was to extend its capture software into portals and Web sites, and Kofax Web Capture is based on our toolkits."

"Right after Atalasoftware was acquired, we released a .NET version of Web Capture. However, to service the entire Kofax customer base, we needed to deliver a Java-based Web Capture product as well. JoltImage is included in the version that was released in July."

According to Franco, JoltImage took about five person-years to develop. "We didn't have to re-write any of the pieces that run in browser," he said. "We could re-use the DotImage browser pieces because they don't care what the back-end is. It's the server pieces that had to be re-written in J2EE. We started on this right after the acquisition, which was just over a year ago."

JoltImage includes all the major functionality of DotImage, including viewing, annotations, image processing, and browser-based scanning (branded WingScan). "JoltImage supports the main use cases like scanning, viewing, and releasing into SharePoint or Kofax Capture," he said. "There are some features in DotImage, such as a series of add-ons like bar-code reading, that we plan to add later. Eventually, we'd like to get both products on the same release schedule with the same feature set."

Franco stressed that Atalasoftware's introduction of a Java SDK is not indicative of weakness in the .NET market. ".NET is not going away," he said. "Java support is more about us planning out our next five years of growth. There are a lot of back-end apps out there, even ones that run in an iOS environment, that utilize Windows Azure on the back-end."

Franco agreed that JoltImage should help Atalasoftware increase its business in the financial services and banking market, which is heavily reliant on Java [see DIR 5/4/12, story on page 6].

For more information:

<http://www.atalasoftware.com/products/joltimage/>;

<http://www.kofax.de/support/products/web-capture/10/>

TMBS, FROM PAGE 1

enterprise services, TMBS, the new organization will cover the "full spectrum of business communications." "We will package our offerings as 'managed services'" he said, "with the goal of truly helping customers innovate their businesses."

TMBS hopes to differentiate its solutions from those of other MPS providers. "The MPS space has become overcrowded," said Applegate. "You've got MFP vendors, big box office equipment providers, VARs, and even large technology distributors playing there. And their value propositions all sound alike."

"Basically, they tell the same story. They provide a baseline assessment and an analysis. They then help customers right size their fleets by doing things like replacing inefficient desktop printers with workgroup models. And they provide software to manage that new fleet of printers."

"We believe that creating a lower cost per printed page is only a foundation for managed services. The true value is in reducing print. The paperless office is a myth, but running an office with less paper can be a reality today."

To help deliver this, TMBS is offering solutions including products from document imaging and management ISVs like **Perceptive**, **DocuWare**, **Adobe**, and **Drivve**. Melo stressed that Perceptive's acquisition by **Lexmark** will not affect Toshiba's relationship. "We are truly vendor agnostic solution providers," he said.

For more info: <http://toshiba-solutions.com/tmbs/>

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