

Document Imaging Report

Business Trends on Converting Paper Processes to Electronic Format

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October 19, 2007

THIS JUST IN!

DELAYED PROJECTS HURT TIS

Top Image Systems (TIS) recently announced that its third-quarter revenue would be coming in below expectations. In a conference call with investors, Ido Schechter, CEO of the Tel Aviv-based document capture vendor, blamed the shortfall on projects that were delayed, but added that the company's sales pipeline remains strong. TIS pre-announced revenue of \$6.0-\$6.3 million for the three months ended in Sept., more than \$1 million below original projections.

"There is no problem with the market that we can see," said Schechter. "We had large projects in the U.K., Australia, and the United States, which totaled in excess of \$2 million, that we had expected to recognize in the third quarter but were delayed. These projects contribute to our current healthy pipeline and backlog of installations. We expect to hit our projected fourth quarter revenue of \$8 million."

Schechter noted that TIS' Asian business, which includes the recently acquired **AsiaSoft** [see *DIR* 7/20/07], is doing well. "We thought AsiaSoft would bring in \$1.7-1.8 million this quarter, and it did," he said. "Also, the new management in Japan has brought our business there [which contributed to the first quarter shortfall] back up to the levels we expect."

The revenue shortfall will produce a quarterly operating loss of \$1.4 million-\$1.8 million for TIS. This follows a slightly profitable second quarter, but is similar to this year's first quarter. Final third-quarter results will be available at the end of November as TIS is still working to assimilate AsiaSoft's financials into its GAAP methods.

For more information:
<http://www.topimagesystems.com>

Management Team Brings Solutions-Focus To Anacomp

docHarbor flows upstream. This is the word out of **Anacomp**, as the image outsourcing specialist has begun to supplement its world-class hosted image repository with higher-value, transaction-oriented services. As part of its transition, Anacomp has hired an impressive team of veteran document imaging executives and is launching several initiatives targeting key vertical markets.

"Anacomp has some very rich assets," said CEO Howard Dratler, a former **Captiva** EVP who was hired in February. "This includes over 40 years experience in information processing for large companies in the United States and Europe. We have a lot of Global 2000 customers that have been with us for more than 30 years. And in docHarbor, we have one of the strongest multi-tenant online repositories on the market."



Howard Dratler, CEO,
Anacomp.

"What we didn't have, before the new management team came on board, was leadership with a software background that could rationalize these assets. Anacomp needed a team that could build a strategy and direction to enable it to grow."

The team Dratler has assembled includes VP of Marketing, Channels, and Strategic Alliances Wayne Ford, who worked with Dratler at both Captiva and **Veritas**; VP of Worldwide Professional Services Matt Albanese, a former ActionPoint and Captiva employee; former **Kofax** executive and **Strategy Partners** analyst Michael Ziegler, who is Anacomp's VP of docHarbor Europe; and Senior VP of Americas Sales Tom Ullman, who also worked at Captiva and Veritas.

"This is not a reinvention of Anacomp, so much as an evolution," Ford told *DIR*. "We are building on our legacy. We are going to continue to deliver on our core business, but also are looking to move higher up the

value chain.

“Of course, this has forced us to do some things differently—to hire a new type of sales rep and do a completely new type of marketing. We are now focusing on delivering solutions, not just technology.”

First solution is e-discovery

As part of its solutions strategy, earlier this year, Anacomp completed the acquisition of **Caselogistix**, an ISV specializing in litigation support. “Caselogistix offers some tremendous litigation management technology that is consumed as a service,” said Dratler. “In today’s market, litigation support includes both paper and electronic documents, such as e-mail. To complement Caselogistix, we have a world-class scanning operation. In addition, docHarbor provides a great infrastructure for storing both electronic documents and images.”

Anacomp’s Global 2000 customer base is the sweet spot of the current booming litigation support market. The market is being spurred on by recent developments, such as changes to the federal Rules of Civil Procedure [see *DIR* 1/20/06].

Dratler said Anacomp has also identified human resources and accounts payable as hot spots for imaging solutions in its customer base. “We are laser focused on those three verticals, along with the federal government market,” he told *DIR*. “We are building out our software as a service (SaaS) platform to provide rich solutions around that focus.

“All these areas give us the opportunity to leverage our assets of capture on the front end and a strong archive on the back end. We are also building out our professional services organization to help us better architect and design specific customer implementations of our technology.”

Driving partnerships

Anacomp expects to release HR and AP-specific SaaS offerings in 2008. It is currently working with leading capture vendors to develop the solutions. “Part of my job is to drive

ANACOMP CONSIDERS VERTICAL ACQUISITIONS

Anacomp beefed up its scanning capabilities with the 2006 acquisition of long-time **Captiva**/InputAccel premier partner **Image Acceptance Corporation** (IAC). IAC, which is based in Warrenton, VA, is a service bureau with a strong federal government customer base. IAC also helped Captiva pioneer some of its digital mailroom technology [see *DIR* 6/18/04].

We asked CEO Howard Dratler if Anacomp was planning any more M&A activity. “Acquisitions are definitely on our radar screen,” he said. “However, it would only be something relative to the core markets I mentioned. For example, if we found an HR application that could be made available as an SaaS offering, that would be interesting.”

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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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strategic relationships that will help us be more relevant in the delivery of solutions,” Ford told *DIR*. “We are very close to announcing partnerships with Captiva and Kofax that, along with our own secret sauce, will help us deliver more advanced capture.

“And part of what we are asking Matt [Albanese] to do is develop a world class professional services business. This will enable us to do more custom delivery, including acting as a systems integrator if a customer wants to keep its documents in-house. We are also looking to partner with global SIs, like a **Perot** or **EDS**, that might want to build their own solutions incorporating our document-centric services.”

Foundation for growth

Of course, the foundation of everything we’ve discussed is the docHarbor repository. Anacomp first launched docHarbor in the late 1990s as part of the initial wave of ASP (application service provider) solutions that was sweeping the dot-com driven market. By 2000, we reported that Anacomp had sunk \$60 million into the hosted repository, and that it was returning around \$1 million per quarter [see *DIR* 9/1/00]. Shortly thereafter, Anacomp filed for Chapter 11 bankruptcy for the second time in five years.

Since then, however, the docHarbor vision has proven to be on target, as by the end of 2006, it had grown to producing approximately \$90 million per year. In the meantime, Anacomp’s legacy, microfilm-centric business was shrinking from well over \$100 million per year, to somewhere north of \$30 million.

Anacomp is now primarily owned by a pair of investors, Santa Clara-based **Tennenbaum Capital Partners** and Lloyd Miller, III. “They have been the major investors in Anacomp for more than five years

MVS COULD BE SPUN OFF

In addition to docHarbor, **Anacomp** has a \$40-million per year third-party product service business that focuses mainly on the storage industry. “Our multi-vendor services (MVS) unit operates as its own distinct business apart from docHarbor,” said Dratler. “While it’s a growing business and contributes positively to our financial position, our strategic direction is centered on docHarbor.

“We are continuing to run MVS as a viable business unit. At the same time, we are considering our options, including spinning it off, or further divesting in it through management buyouts, like ones we’ve already completed in Europe.”

<http://www.anacomp.com/multivendorservices.asp>

now,” said Dratler. “They are very committed to the business and the path we are pursuing. I spent six to nine months meeting with the investors, discussing the history of the company, and talking about the future, before I joined. They have been great backers and are making the investments we need to make.”

For more information: <http://www.anacomp.com>

Mitek Introduces .NET Platform

SOA recognition tools target distributed capture

Recognition specialist **Mitek Systems** has re-architected its technology and re-focused its business. The San Diego-based ISV recently launched its SOA-based *ImageNet* platform, a .NET set of technologies designed to be consumed as tools by ISV and integration partners. *ImageNet* offers technology for automated data capture from checks, remittance coupons, and forms, as well as signature verification and fraud prevention.



James B. DeBello,
president and CEO,
Mitek Systems.

“Mitek’s sweet spot has traditionally been helping its partners process payments,” said James B. DeBello, president and CEO of the publicly traded company. “We also were one of the pioneers in unstructured document recognition technology. Our domain expertise is anything that involves pattern recognition on digital images.

“We see a few trends emerging in these markets. The first is the convergence of document and payment processing solutions, and the second is increasing adoption of distributed capture. *ImageNet* is positioned to address both those trends.”

Current ISVs and integrators that leverage Mitek recognition technology include **J&B Software, AFS, BancTec, DMP, Fairfax Imaging, Scan-Optics, Harland Financial Solutions,** and **Unisys**. “We supply these vendors with engines they use in high-volume, centralized payment processing applications,” said DeBello. “With the adoption of Check 21 and ARC (accounts receivable conversion) processes, there has been an increasing interest in capturing payments at distributed sites. Our .NET technology can be enabled to run in browsers, which will enable our partners to provide true remote capture capabilities to their customers.

"We see this type of technology as attractive to the AR departments of businesses that receive checks daily. With remote capture capabilities, in a single process, they can automatically enter data both into their internal accounting systems and transfer payment data and images to their bank for processing."

The *ImageNet* platform is broken down into four categories of tools:

- 1.) **ImageNet Payments:** check and remittance capture
- 2.) **ImageNet Form Recognition and Image Enhancement:** includes forms recognition and clean-up
- 3.) **ImageNet Data Capture:** unstructured forms processing
- 4.) **ImageNet Signature:** patented technology for doing signature recognition with binary streams of data
- 5.) **ImageNet Fraud:** technology for ensuring the validity of checks

"We've made an effort to both simplify our branding, as well as the way our partners work with our technology," said DeBello. "We used to have 14 different APIs for integrating with the technologies now enveloped in a single platform."

The *ImageNet Payments* and *Form Recognition and Enhancement* modules were released in August, with the other four modules scheduled for release before the end of 2007. At the upcoming **AFP (Association for Financial Professionals) Conference** in Boston, Mitek will be announcing a subset of the *ImageNet* tools, known as *Remote Remit*. "*Remote Remit* is a blend of our unstructured forms processing and payment processing technology,"

MOVING FORWARD

With the release of *ImageNet* and a profitable fiscal third quarter [ended June 30] in the books, **Mitek** would appear headed down the right track. It's certainly come a long way since January, when the company was coming off a losing quarter and had just broken off its proposed merger with **Parascript** [see *DIR* 7/21/06]. Mitek, which is about a fourth the size of Parascript, called off the merger during the due diligence process.

"Even though the merger process took up a lot of our time and resources, the *ImageNet* technology remained in development," said James DeBello, president and CEO of Mitek. "That's all behind us. We are now focused on being a leader in pattern recognition technology. Originally, that involved recognizing text on single page documents; today, it often includes multi-page documents. We've also started to recognize pictures and objects. In the future, it could include applying recognition to streams of video."

said DeBello. "It's designed as a Web-based tool for capturing payment data that can be deployed without the trouble of setting up templates.

"By its nature, distributed capture creates potential for several sites capturing smaller volumes of documents vs. centralized sites with larger volumes. Capturing smaller volumes, however, means you can't necessarily justify the time and resources needed to set up templates. *Remote Remit* addresses this."

Mitek is embracing a flexible pricing model to handle what it sees as a variety of deployment possibilities. "For example, *ImageNet's* SOA architecture lends itself very well to a hosted deployment, through which our partners could charge per item processed," said DeBello. "They might want to pay us a percentage of those charges or license our technology through a server-based model, so they profit more as their volume increases."

DeBello concluded by saying it's his opinion that *ImageNet* represents the next-generation of recognition. "As a tools vendor, it's important to stay ahead of the curve and anticipate the type of technology your partners will want to offer their customers," he said.

For more information: <http://www.miteksystems.com>

XGS Buys Mortgage Collaboration Service

Xerox Global Services (XGS) continued its expansion into vertically oriented services with its acquisition of **Advectis** for \$32 million. Advectis, an Atlanta, GA-based ISV, has developed a solution to enable mortgage bankers to electronically share and collaborate on loan documents. Advectis' flagship *BlitzDocs*' suite is used by some 40 clients, including **HBSC, East West Mortgage, Homecoming Financial, and GME Mortgage**. Earlier this year, Advectis announced that the *BlitzDocs*' repository, which is made available to clients through a SaaS (software as a service), or hosted, model, has surpassed one million loan folders stored.

"This acquisition is part of our long-term transformation into more of a services-oriented business," said John Kelly, president of Xerox Global Services (XGS) North America. "Advectis is a business process services specialist. It deals with a digital workflow and the documents related to that workflow. Selling *BlitzDocs* is a services proposition,

not a hardware proposition, and that's where XGS wants to be.

"We made a similar acquisition when we bought e-discovery specialist **Amici** last year. They are also a services-oriented business. And like litigation services, mortgage banking is a document intensive industry."

"The problem with traditional imaging systems is that they typically work very well inside a single organization.... In the mortgage banking industry, the benefit of imaging is minimal if you can't extend it outside your walls."

-- Greg Smith, Advectis

Advectis was founded in 2000 by a team that had formerly worked at document imaging software specialist InterTech. [In case you're wondering, in 2004, InterTech was acquired by a EMR company: http://documentimagingreport.blogspot.com/2004_07_01_archive.html] "Working at an imaging vendor, we saw that the mortgage industry was laden with paper," said Greg Smith, co-founder and CEO of Advectis. "However, there is one significant difference between mortgage processes and other types of imaging applications. That is, processing a mortgage loan typically requires a huge network of companies collaborate on the documentation.

This includes people like brokers selling loans, underwriters funding them, QC firms that want to review them, various departments within a bank, etc. Even after a loan is closed, you have people that want to investigate the documentation to potentially buy the loan. *BlitzDocs* provides a bridge for collaboration among all these parties.

"The problem with traditional imaging systems is that they typically work very well inside a single organization. However, when you try to extend them outside company walls, you run into problems with security and enabling true collaboration. In the mortgage banking industry, the benefit of imaging is minimal if you can't extend it."

A one-to-many-solution

Advectis' solution is a hosted repository that offers controlled access and document rights to various parties. *BlitzDocs* has its own capture application that includes bar code recognition. "There are a number of ways to upload documents into our

repository, including integration through our Web Services layer or just scanning to a PC and uploading from there. We also accept electronically generated document formats.

"The documents are all stored in a single repository, but users are only allowed to see the ones that pertain to them," said Smith. "To date, larger lenders have been our typical customers, because they have more complex problems and more people they need to provide access to. However, the SaaS model, and our per-loan pricing, makes the application accessible to smaller lenders."

XGS will initially market *BlitzDocs* directly to its large and mid-market customers. "However, we are always looking at additional channels," said Kelly. "For *BlitzDocs*, this could include some of the outlets acquired recently with **Global Imaging**, which primarily specialize in the SMB."

"There are probably between 30,000 and 50,000 mortgage broker shops in North America," added Smith. "And, although the U.S. is the most sophisticated mortgage market in the world, it's still very archaic in some of the technology being used.

"Regarding the recent market downturn, our business has slowed down from the levels it hit this spring, but I think we've already hit bottom. We are starting to see increasing volume again among our core customers and have a number of smaller contracts we are expecting to finalize. We are also seeing international mortgage markets developing fairly rapidly. Finally, although mortgages represent our first vertical, they are not necessarily our last."

For more information:

<http://documentimagingreport.blogspot.com/2007/09/xerox-buys-emortgage-specialist.html>
<http://www.advectis.com>
<http://www.xeroxglobalservices.com/>

AN EYE TOWARD E-MORTGAGES

During our discussions with **XGS** and **Advectis**, the topic of e-mortgages came up. For several years, there has been a standardized SMART (secure manageable archivable retrievable transferable) Doc format for electronic mortgages. However, this spring a representative from the **Mortgage Bankers Association** estimated that less than 1% of mortgages being closed in the U.S. are electronic [see *DIR* 4/20/07].

"We see paper in the mortgage industry being gradually reduced," said Greg Smith, CEO of Advectis. "As it is, we will transform from an imaging specialist to managing a hybrid of images and electronically generated documents. Our architecture has been designed so that we can make the transition to SMART Docs when the time comes."

HP Upgrades Workgroup Models

HP has introduced some upgrades to the popular workgroup scanners it first introduced last spring. HP is in the process of rolling out three workgroup models that all feature ultra-sonic double feed detection, increased duty cycles, and an improved scanning application. The new sheetfed-only model also features a 40% improvement in rated speed.

“We still sell a greater volume of scanners in what we define as the general office market, where most of our flatbed models have traditionally played,” said David Haining, HP’s product manager for document scanners. “However, our sales of document scanners are quickly catching up. The overall market for general office scanners is declining at about the same rate the market for dedicated document scanners is growing.”

Last spring, HP introduced its first single-pass duplex scanners—two flatbed-enabled and one sheetfed-only model [see *DIR* 3/17/06]. These scanners helped HP attain second-place in market share for workgroup (sub-\$2,000) scanners in 2006, according to industry analysts. The new sheetfed-only model, the Scanjet N7710, will be offered as an alternative to the original 7800 sheetfed-only model. The two new flatbed-enabled models, the Scanjets N8420 and N8460, are replacement models.

“The 7710 has a similar casing and document feeder as the 7800, but the internal workings have been rebuilt,” said Haining. “This accounts for the increase in rated speed to 35 ppm/70 ipm. We’ve also put JPEG compression inside the hardware, so the scanner doesn’t slow down when capturing color. Finally, we’ve improved the card reader to better handle embossed cards.”

The 7710, which is now shipping, carries a street price of around \$999. This makes it approximately \$200 more than the 7800, which will continue selling for \$799.

Aside from the double-feed detection, the flatbed models feature the same hardware as their predecessors and are rated at the same speeds, 25 ppm/50 ipm for the 8240 and 35 ppm/70 ipm for the 8460. They also have the same list prices of \$1,199 and \$1,499, respectively. The main difference is the upgraded software.

All three new models come bundled with HP’s *Smart Document Scan Software (SDSS) 2.0*. SDSS is a PixTools-based capture application that features **Kofax** VRS and single-button capture and auto-

launch capabilities. “In the previous version of SDSS, we required users to manually approve images after they were previewed on a PC,” said Haining. “This required interaction with the PC at least once. With the new version, we’ve introduced the option of an auto-preview, which will show the thumbnail, but then automatically save the file and close SDSS.”

Other new SDSS features include the option to create MRC (mixed raster content) or aggressively compressed PDFs, output to PDF/A, XPS, TIFF LZW, and BMP formats, support for longer documents (up to 34-inches), improved bar code recognition, a link to *SharePoint 2007*, and the ability to work in a VRS-interactive mode.



On the outside, HP’s new Scanjet 7710 looks the same as the 7800 introduced last spring. However, the new model is 40% faster.

“We’ve also improved the button configuration on the flatbed-enabled models to be more conducive to document scanning,”

said Haining. “Overall, we’ve narrowed the focus of these models and moved away from some of the photo-centric software included on the previous models. While some of our customers liked these options, we decided to redeploy our resources in more document-centric areas, such as adding the ultrasonic double-feed.”

Multi-color dropout has also been added to the 7710. This enables automatic dropout of up to three colors at once. Those colors can be created from a mix or chosen from a pallet, and the sensitivity of the dropout can be adjusted.

A solutions approach

HP has also increased its support for document scanners and is now offering packages that include installation, next-day exchange, and post-warranty options. “We have also been working the past 6-9 months to test compatibility of our devices with products from leading ISVs like **Kofax**, **Omtool**, **Hyland**, and **Laserfiche**,” said Haining. “In addition, we are working with their marketing departments to develop programs in areas like lead exchange and other support activities.

“We are partnering with these vendors with an eye toward integrating both our MFP devices and our standalone scanners. Our hardware creates the unique opportunity for partners to go in and talk

about a balanced distributed deployment of multiple types of devices. We are also building out our own professional services, so we can better implement complete document management systems.”

For more information:

http://www.hp.com/large/ipg/docmanage/doc_capture.html

EAI For Content Management

Document management (DM) has traditionally been deployed as a departmental solution. However, in recent years, the concept of enterprise content management (ECM) has been gradually replacing DM, especially in larger organizations. The point of ECM is to apply controls and management to unstructured information across an enterprise. But, one challenge that has arisen in the deployment of ECM is dealing with the multitude of departmental DM systems that have already been installed.

“It’s not uncommon for an organization to have 50 document management repositories; this includes departmental systems from vendors like **FileNet**, **Open Text**, **Documentum**, **Hyland**, etc., as well as e-mail systems,” noted Jay Rothe, director of business development for Philadelphia-area ISV **VitalPath**. “VitalPath’s roots are in the life sciences industry. We’ve since moved into other markets like government and energy. The one common denominator we’ve found is that, for the most part, organizations are managing their content at the departmental, or line-of-business, level.

“However, to optimize their businesses, they realize they need to share this information among departments. That is why the concept of ECM is so appealing.”

One way to transition to ECM is to rip out the departmental systems and move everything into a new, corporate-wide ECM application. However, this type of upgrade can be both costly and time consuming—not to mention tough on the people used to working with the legacy applications.

VitalPath offers an alternative. “Our *PathBuilder* software provides out-of-the-box integration among diverse content management applications,” explained Rothe. “We consider it to be enterprise application integration (EAI) software for content management.

“We started out brokering exchanges between document management systems. For example, we had a life sciences customer that, after it approved documents in its *Documentum* application, needed

to send a copy to its regulatory affairs repository. We call this creating ‘discreet logic’ among content management systems.

“We realized, however, that we were overlooking the meta data associated with documents and developed *PathBuilder* to manage shared meta data as well. This typically involves doing some translation of terminology and reformatting, but it provides *PathBuilder* with the ability to create a unified set of documents and meta data that can be searched and managed as a single repository.”

Virtual records management

Through a recently announced partnership with **Tower Software**, VitalPath is also enabling customers to apply records management across diverse repositories. “This integration can be used to create a virtual enterprise records management system,” explained Rothe. “The documents remain in their original repositories but can be seen through the Tower application. For example, with *PathBuilder* acting as an intermediary, a user can take advantage of Tower’s capabilities to execute a hold on a block of documents in a Documentum system. *PathBuilder* intercepts the command from Tower and translates it into a language the Documentum system understands. When the time period for the hold is over, the user gets a notice from Tower. Once again, *PathBuilder* intercepts the command to delete from Tower and passes it on to the Documentum system.

“We see this as an important application, because, although records are typically being managed at the departmental level, best practices call for setting records management policies at the enterprise level.”

A friend to ECM ISVs

Tower and Open Text are currently acting as resellers of *PathBuilder*. “We are in discussions with other ISVs,” said Rothe. “It’s advantageous for ISVs to work with us, because we keep their clients from feeling trapped. Of course, there is some co-opetition. For example, we helped a Documentum customer upgrade from version three to version five, by enabling the customer to keep its legacy documents in version three. We were able to make this happen for a fourth the cost and a third the time that a systems integrator wanted to upgrade everything to *Documentum 5*.”

VitalPath has 65 customers, including big-name organizations like **Johnson & Johnson**, **Purdue Pharma**, **3M**, and **Abbott Laboratories**. “We find that most of our customers start small, by integrating a couple of repositories,” said Rothe. “When they realize how valuable that is, they start to expand. Johnson and Johnson, for example, has 150

different repositories. No, we don't touch them all yet, but our presence is growing."

For more information: <http://www.vitalpath.com>

Open Text Enhances RM Capabilities

Open Text is hoping to increase end user buy-in to e-mail management by making it simpler to use. To achieve this, the ECM ISV has integrated its software with **Microsoft Exchange Server 2007's** managed folder capabilities. This was one of two records management (RM) announcements Open Text made at last week's **ARMA Conference and Expo** in Baltimore.

"One of the new features of *Exchange* is the ability to push sets of pre-defined file folders to users," said Mike Bolte, Open Text's program manager for e-mail and litigation management solutions. "We've introduced the ability to map those folders directly to our RM technology."

This means, for example, that if a user has a policy that says all customer correspondence with brokers has to be kept for three years and then destroyed, the user can set up that policy in its Open Text RM system and push out a "customer correspondence" folder to its brokers' *Exchange* applications. The brokers drag-and-drop e-mail correspondence into the labeled folder and three years after they've been filed, each message is automatically sent to a records manager for a deletion decision.

"Previously, you could achieve similar functionality,

but it required a client piece to do a folder display within *Exchange*, and it was controlled, not by *Exchange*, but by our repository," said Bolte. "The bottom line is that ease-of-use has been a big barrier to the adoption of e-mail management, and we hope by integrating our functionality within the context of the Microsoft front end, we will increase adoption and buy-in to the technology."

Bolte noted that, especially in North America, he is seeing a migration of end users away from e-mail archiving, and toward e-mail management. "Archiving, while it offers some RM functionality, is basically about reducing costs by cutting down on the amount of data being kept in *Exchange* or *Lotus Notes*. With archiving, you typically have a straight-forward retention cycle that calls for users to destroy all old e-mails after a set time period.

"E-mail management is more advanced. It's about classifying different types of e-mail, according to a policy that can be either event- or time-driven."

Applying RM to IM

Open Text also announced a partnership with **FaceTime Communications** that will enable it to bring instant messages (IM) into its RM application. "This relationship was driven out of customer need," said Bolte. "We are continuing to expand our RM controls to as many areas as possible. Sure, it's easy enough to capture records like IM, voice mail, and security video—the hard part is being able to locate and control these records when you need to."

<http://www.opentext.com/news/pr.html?id=1939>

<http://www.opentext.com/news/pr.html?id=1940>

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