Document Imaging Report

Business Trends on Converting Paper Processes to Electronic Format

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THIS JUST IN!

KOFAX REVENUE DOWN IN Q1

Document capture ISV **Kofax** recently reported its fiscal Q1 2013 (Sept. 30) results, which were somewhat disappointing. Total revenue of \$60.1 million represented an .8% decline compared to the Q1 2012. Revenue from software licenses and professional services were down. This was somewhat offset by gains in software maintenance revenue. Kofax CEO Reynolds Bish dismissed the results as attributable to Q1 being a traditionally weak quarter and reaffirmed Kofax's "guidance for all of fiscal year 2013, which is for mid- to high-single-digit total revenue growth on a constant currency basis," and an EDITDA of at least last year's total of \$48.5 million.

"I do not expect to see a decline in software license sales for the year," said Bish in a conference call discussing the financials. "Maybe in the first half, but not for the year. I also expect that strong growth in maintenance will continue. You always want to be cautious, but we have been seeing increasing renewal rates, especially in the Americas. We quoted renewals at 85% a couple years ago, now they are over 90% in the Americas, inching toward 92.5%."

Bish said that revenue decline in EMEA was expected, but he anticipates to see that region start rebounding in the third quarter. "Q1 typically makes up 20-23% of our annual revenue, and we are projecting it to be about 21% this year," Bish said. "So, our performance is within our historical range."

Check our blog post at http://documentimagingreport.blogspot.com/ which offers some potential reasons for Kofax's declining software sales. Also, for news updates between newsletters follow me on Twitter @DIREditor.

Meta Data Extraction Specialist Hopes to Revolutionize ECM

The old adage in the document management industry has always been that 80% of a user's content is unstructured and held primarily in documents. The other 20%, well that's the neatly structured stuff kept in columns and rows in a user's databases and utilized by data-driven applications like ERP, CRM, and other line of business systems. The goal of ECM has always been to transform unstructured data into more usable structured data. With the advent of "big data" applications on the horizon, the need to transform unstructured content into structured data is more paramount that ever.

To date, ECM has been successful primarily in highly regulated industries and in markets where the high value of transactions related to documents makes it worth a considerable investment of both money and resources. That's why ECM has historically been most successful in markets like insurance, government, and financial services.

But, in recent years, with the advent of lower priced platforms like SharePoint, there has been a move to democratize ECM. But, while SharePoint, and other lower cost products, may help reduce the financial investment organizations need to make in ECM, they don't reduce the resources that need to be invested. A good deal of these resources are utilized capturing meta data.

Feeding the data monster

It's no secret that an ECM system is only as good as its meta data. Meta data is, in fact, the structured component of an ECM system—the part that enables it to interact with data-driven applications. If a user wants to find an invoice, for example, stored in their ECM system, they can often do so by clicking on the invoice number in their ERP system—which then makes a call to locate that same number in the meta data of the ECM system. In the document imaging world, we also refer to this meta data as "indexing fields."

Document capture is, in fact, often about collecting meta data for indexing images. But, the majority of

content stored in many ECM system is electronically generated documents, which aren't run through a typical document capture process. No, instead, the burden for capturing meta data for electronic documents often falls on the knowledge workers who are creating them—and this can be a non-starter.

From an **AIIM** blog entry by James Santangelo, who is now a senior product manager for healthcare informatics at **Aetna**, "One of the biggest impacts on the end user when implementing an ECM system is the time it takes for end users to enter metadata. A user would state this issue as: 'The way the ECM system was designed requires that I enter in many metadata fields before I can store information in it. While these fields may be important to the company, I don't have time to fill them out.'

"The user in this case will try to find some other way to store their information, in some other repository, resulting in a system that is seldom used and lost shared company information. In reality, the user would not like to enter in any metadata while the company typically requires numerous tags. Well intentioned ECM designers want to give the business managers all the metadata they ask for, but the business managers seldom understand the impact of the effort required by their employees."

The bottom line is that it has been estimated that somewhere between 30% and 75% of ECM implementations fail. Inadequate meta data capture is often cited as a primary reason.

Automating meta data capture

Automating meta data entry could certainly help reverse this trend, and New Zealand-based ISV **Pingar** has developed a tool for accomplishing this. Pingar, which has its roots in natural language processing (NLP), recently released an application branded Meta Data Extractor for SharePoint 2010. It is also offering an SDK for integration with other ECM platforms.

"Pingar provides tools and technology for understanding documents," said Chris Riley, VP of marketing for Pingar, which recently began ramping up its North American team. In addition to hiring Riley (a capture and SharePoint market expert), whose marketing responsibilities are global, Pingar recently appointed Don McMahan as president of Pingar, Inc., its U.S.-based business unit, which is headquartered in Sunnyvale, CA.

Pingar, Inc. also recently named former **Metalogix** (a lifecycle management ISV for Microsoft environments) sales executive Curtis Gion its VP of business solutions. Gion splits the U.S. sales territory with former **Fujitsu** sales executive Doug Cripps, whose title is VP, business development and strategic alliances for Pingar, Inc.

McMahan is best known to *DIR* readers as the former VP of sales at FCPA, and holding similar positions at scanner

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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.

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vendors Visioneer and Kodak Document Imaging. "We will be bringing Pingar's software to market in a little bit of a different fashion than I brought scanners to market," McMahan told DIR. "We will have both direct and indirect components to our strategy.

"It's inevitable that with a product of Pingar's complexity you need a direct channel. Our indirect channel will consist of systems integrators, especially in the Microsoft space. We also think we have a legitimate play in the more traditional ECM market. with both ISVs and resellers who might want to take advantage of our API to integrate our software with their repository and workflow products.

"We want to stress that we do not offer a standalone solution. In fact, we are even pursuing OEM agreements."

McMahan added that although Pingar has been in existence since 2007, in the U.S. especially, it is essentially operating as a start-up. "We are starting at ground zero, with no channel or sales," he said.

McMahan said that we can expect to see some Pingar customer references by the end of the year. "Most of our initial deals will come from soon-to-beannounced partnerships through which customer opportunities are already being developed," he said.

Early partnerships

Pingar has already announced two partnerships: one with **Nintex** and one with **BA Insight**. Both are ISVs that develop solutions for the SharePoint space. Nintex specializes in workflow and BA Insight in search.

"Nintex is one of the largest ISVs in the SharePoint ecosystem," said Riley. "Its customers currently need structured content to execute workflows, which are triggered by specific data elements. Pingar's technology will enable Nintex to bring unstructured content into the processes it is automating.

"For example, if someone uploads a document with my name on it, and Pingar determines that it contains keywords that mean it's related to a legal case, the document could automatically be put in a workflow for sensitive information. Partners like Nintex will be able to build messaging around use cases featuring our technology. This will help end users understand our value."

Leveraging NLP

Riley described Pingar's technology as basically having the ability to automatically extract keywords from documents. "It's how we determine those keywords that is the secret sauce," he said. "We use NLP, but we have to be careful when we say that because almost nobody who uses that term applies the same meaning. We may all get the same results, but in our view, real NLP is not matching or doing a statistical count of how many times a word appears in a document. It involves looking at the semantic structure and advanced components of a document

> and from there being able to come up with its meaning.

> "For example, if my name is mentioned once in a document. but I am referred to 10 other times as 'he,' our software should understand that I am mentioned 11 times. That's an oversimplified example, but gives you an idea of what I'm talking about."



Don McMahan, president, Pingar,

A demonstration of the Pingar technology showed how it works on three levels:

- **keyword extraction:** In this mode, the technology determines the most important words, extracts them and lists them in a hierarchy. A user sets the number of keywords they want extracted per document.
- **entity extraction:** In this mode, the software is asked to look for specific types of words like locations, people, a certain type of number, dates, email addresses, etc.
- **keyword matching:** In this mode, a user provides the Pingar technology with a pre-existing set of keywords and/or classification that the Pingar technology can apply to a document set. Taxonomies, databases, and other types of lists can be utilized.

Use cases

Riley cited multiple use cases for Pingar's technology. "As, we've discussed, the first is in conjunction with an ECM system," he said. "It can help a user migrate to ECM and help them manage a system thereafter," he said. "Initially, our technology can help users determine what they have and how they want to build their taxonomies. Often, if a user tries to migrate from a simpler file system to an ECM system without first understanding what they have, they'll end up modernizing their mess. In Microsoft environments, this is often referred to as SharePoint sprawl.

"Once the ECM system is up and running, organizations will often find that end users hate entering meta data. Rarely will they do it right, if at all. And if they are doing it, it's not being done in a consistent manner. Pingar enables users to forget

about entering meta data. It will increase adoption of an ECM system by making it easier to use. This, in turn, puts less stress on the records management department."

Riley cited compliance and security as another use case. "When doing a search for a lawsuit, for example, Pingar can ensure users are getting all the files they want," he said. "A user might be looking for files on a certain product, and a filename might not give any indication that a document is about

that product, and the product name might not even be mentioned, but Pingar will help a user locate that document.

"You can also combine Pingar with BPM to ensure that legal agreements, for example, are flagged if they are filed in the wrong place.

A user might try to upload a confidential contract to an extranet and the results from Pingar could be used to trigger a workflow to stop that from happening.

"A final use case, which is more cutting edge, is big data analytics. Keywords might be able to help organizations understand from a contextual standpoint, not only the content of individual documents, but also the content of entire collections of documents. This might enable them to merge or separate certain repositories based on similarities or differences. Or, our technology might be used to detect certain trends in keywords in incoming documents that might alert an organization that they need to take action on something."

Riley noted that Pingar is taking its technology to market as both a product and a tool. "With Meta Data Extractor for SharePoint 2010, we have built a product that can solve some specific problems around meta data capture and search," he said. "We are also having conversations with ISVs in the ECM space about building other solutions—some of which will push the envelope of what the ECM market has accomplished so far."

McMahan said that additional announcements will be forthcoming around the SharePoint space before other ECM partnerships reach the next level. "We see the SharePoint community as the most direct route to market," he said. "It will also provide us with an avenue to further validate our technology."

Pingar will be exhibiting at next week's Microsoft SharePoint Conference being held in Las Vegas. Former Microsoft SharePoint ISV partner manger Owen Allen is now Pingar's VP of solutions and is serving as the company's primary liaison to the SharePoint community [see <u>DIR</u> 6/22/12].

Some logistics

Meta Data Extractor for SharePoint 2010 is initially being brought to market with a volume-based pricing model. "Our tools will be licensed on a price per server basis," said McMahan. "Basically, we'll have a variety of models to suit our customers' requirements."

"Pingar enables users to forget about entering meta data. It will increase adoption of an ECM system by making it easier to use."

-Chris Riley, Pingar

While Pingar does offer its software as a cloud service, Riley indicated that private clouds probably make more sense for Pingar's target market. "Our hosted cloud service is more suited for dayforward, ad hoc type applications," he said. "It

might be good for mobile app developers dealing with a limited number of documents on a monthly basis.

"We expect some of our enterprise customers to be dealing with terabytes worth of documents. For them, we recommend private clouds that can be kept in their data centers. The nice thing is that any time we push updates onto our cloud, we'll also make them available to private instances."

Market changing potential

Riley concluded that Pingar's technology has the potential to improve the entire ECM market. "It makes users' investments in their ECM systems better," he said. "It also helps organization's get ready for ECM. Face it, most organizations are not really doing ECM even if they are using SharePoint, or Box, or some other sort of repository. ECM requires a fairly strict set of methodologies that most organizations are not following. Our technology can help them get a better sense of how they need to organize their documents to meet ECM requirements.

"In addition, if organizations want to implement BPM, today their data has to be contained in some sort of spreadsheet or list. We are telling them they don't have to worry about that. We're saying, it can be an article, or a contract, or a conversational thread on Facebook—it doesn't matter, because we can extract the appropriate keywords needed to bring that document into a workflow.

"Most of our competitors assume end users already know what they are looking for. They assume users have a pre-defined set of terms. We have some very unique technology, and we have focused it on some use cases where it will solve specific problems."

For more information: http://www.pingar.com/; http://www.pingar.com/microsoft/

 $\underline{http://www.documentimagingreport.com/index.php?id=2364}$

 $\underline{http://www.documentimagingreport.com/index.php?id=2361}$

http://bit.ly/PingarMcMahan

http://bit.ly/MetaDataExtractorSP2010

http://bit.ly/PingerRileyGion; http://bit.ly/PingarAllen

EMC Adds Text-Based Classification to Captiva

Faster deployment is the theme running through the multitude of product releases announced by **EMC's** Information Intelligence Group (IIG) at its EMEA Momentum end user conference held this week in Vienna. The \$650 million arm of the \$20 billion IT giant made three new full version announcements, as well as introduced several major point releases. A lot of the focus is on more efficient deployment and utilization of IIG's product lines, which include the Documentum and Captiva platforms.

"The series of announcements represents the biggest launch that IIG has ever done," said Bill Galusha, a principal product marketing manager for EMC. Galusha did a call with *DIR* primarily to discuss improvements in Captiva 7.0. It represents the first major release since the InputAccel and Captiva products were combined last year [see <u>DIR</u> 4/1/11].

Each line last had a major release in 2008 [see <u>DIR</u> 12/12/08]. "With the 6.0 versions, we really focused on performance, scalability, and an open architecture to embrace Web services," said Galusha. "With 6.5, the major feature we added was auto-learning. With version 7.0, we focused on improving our software's intelligence, agility, and productivity."

The intelligence improvements build on Captiva 6.5's auto-learning. "In version 6.5, we introduced auto-classification based on the image layout," said Galusha. "With 7.0, we've introduced text-based classification. Basically, our software can now identify documents by looking for blocks of words, as well as their position and surrounding elements.

"On an invoice, for example, Captiva 7.0 can be set up to look for 'total' at the bottom of a page, but we also understand that a value can float. So, our software can now look for a numeric value at the right that can help it determine where the total is.

There are also controls that can be used to give certain values more weight than others.

"We've developed a really complex set of algorithms that we've benchmarked as being more effective at creating templates than humans are. Our internal testing has shown 20% higher accuracy utilizing our automated process compared to having human experts create templates. We even applied for a patent around our process, which we think differentiates us from competitive capture vendors."

Galusha said the new classification technology reduces both the number of templates that have to be created and the number of unrecognized exceptions users will have to deal with. "We've found that different types of devices, like MFPs compared to scanners, and even different brands and models, can cause slight variations in image quality," he said. "An image may drift or the size may vary. Often times, this will prohibit a capture application from recognizing a document as belonging to a certain classification. This will create an exception and/or cause the creation of a new template.

"In many cases, end users end up with more templates than they need, which introduces extra complexities into their applications. Applying our new text-based classification accounts for variations in image quality. We think the combination of our new technology with our image-based classification gives end users the best possible results."

Reusable profiles

To improve Captiva's agility, EMC has introduced a new client for designing capture processes. "We wanted to deliver set-up functionality in the mindset of enterprise capture vs. desktop capture," said Galusha. "One of the features we've introduced is the ability to create 'profiles' that can be re-used across multiple processes.

"For example, an organization might be capturing faxes as part of 10 different document processes. Now, instead of having to set up parameters for cleaning up those fax images 10 different times, they can set up the parameters once and deploy them in each of those 10 instances.

"We also simplified the steps for moving processes from set-up to testing to configuration. We've tried to reduce it to a single click.

"With all the improvements, our conservative estimate is that users can now deploy projects in Captiva up to four times faster than they could previously. And the time savings multiply as users deploy more processes. For instance, while with a previous release it might have taken five minutes to update a process, it now takes 30 seconds and you multiply that out across 100 projects, you're talking about a savings of several hours.

"We think that being able to deploy our capture platform more quickly will encourage users to deploy it in new areas and help them get more value from their software."

A versatile capture client

The productivity improvements are centered on a new client designed to be used for multiple processes including indexing, high-speed data validation, image quality review, and document assembly. "In the past, our users often had different clients for different functionality," said Galusha. "In some scenarios, we had customers writing custom modules for specific tasks.

"Having an adaptable client that can be deployed for multiple use cases without any custom scripting not only makes deployment easier. It also simplifies maintenance and training."

As we detailed last year, the Captiva brand is now being used for all of EMC's capture products with the former InputAccel line now known as Capture and the Captiva/Dispatcher line going by Advanced Recognition. There is also an Invoice Capture product that is a subset of Advanced Recognition.

Other IIG Upgrades

One of the key new features in Documentum 7.0 is EMC's xCelerated Management System (xMS) technology. "It's new technology that works in conjunction with our VMWare [virtualization platform] to enable quick deployment of an ECM platform based on a blueprint or framework," said Galusha. "It allows for rapid provisioning, and our testing shows that with xMS, Documentum can be deployed up to 10x faster than before."

EMC also introduced a new version of Documentum xCP, a process and case management platform that ties into Documentum. According to a press release, xCP 2.0 "dramatically improves productivity with a modern user experience, content and process analytics, and provides the industry's first unified solution design tool for increased agility and faster solution development."

"Well over 100 solutions have been built by our partners on xCP," said Galusha. "This includes everything from claims processing to loan origination to social services case management applications in the public sector."

Finally, EMC announced integration of its

Syncplicity technology with Documentum. Syncplicity is a "cloud file management" application that EMC acquired in May. "Syncplicity basically enables users to sync and share content across all their devices," said Galusha. "This includes smartphones, tablets, PCs, and laptops. Integration with Documentum enables our customers to have powerful ECM on the back-end, but still have the capability to share content across multiple devices."

For more information:

 $\frac{http://www.emc.com/about/news/press/2012/20121106-01.htm;}{http://www.emc.com/about/news/press/2012/20121106-05.htm;}{http://bit.ly/Galushablog}$

Brother Scanner Features Wireless Networking

Brother recently introduced its second workgroup desktop scanner. The new ADS-2500W has a lot of the same mechanics as the ADS-2000 that we profiled earlier this year [see <u>DIR</u> 6/8/12] but introduces network capabilities, including a wireless configuration option, and a color touch panel into the mix. The ADS-2500 is rated at 24 ppm/48 ipm and has an estimated street price of \$800.

"We think the wireless capabilities of the ADS-2500W make it a disruptive product in the market," said Tom Sickles, a senior product manager for Brother. "No other product in its class has wireless capabilities, and we think we've come in at a price point that really sets us apart."



The new Brother ADS-2500W features wireless networking capabilities and a 3.7-inch color touchscreen that can provide access to up to 72 user shortcuts.

The 3.7-inch touch panel enables users to access up to 72 shortcuts that they can configure. These can include scanning to cloud storage destinations like GoogleDocs, Evernote, Dropbox, and Facebook. Internal pin numbers are used to connect individual cloud accounts with the device.

TWAIN, ISIS, and WIA drivers can also be utilized for scanning to PC or document management applications. There is a SANE driver available for Linux environments and an ICA driver for Macs.

Nuance PaperPort is bundled with the scanner, and through it users can connect to SharePoint. A Brother app can be used to scan directly to an

Android device.

The scanners can be configured individually or through a Web-based administration module that can be used to configure multiple devices.

Brother has made one upgrade in its specifications from the 2000, which was conservatively given a 500 scan per day recommended duty cycle. On the 2500, that has been increased to 1,500 scans per day. Also, while the 2000 is marketed in brick and mortar as well as on-line stores, the higher priced 2500 will be primarily sold on-line.

Steve Feldstein, Brother's director of marketing for laser and scanner products, noted that more document scanner models will be on the way from the Japan-based manufacturer with U.S. headquarters in Bridgewater, NJ. "We've been in the MFP market for a long time, and we've seen a lot of use of the scanning capabilities on those devices," he said. "Document scanners really complement our MFPs."

For more information: http://bit.ly/Brother2500Launch; http://bit.ly/BrotherADS-2500W

Imaging Streamlines Political Fundraising

There is no question that political elections are a big money game. In the recent U.S. presidential election, each major candidate spent approximately \$1 billion on his campaign. It's estimated that five times as much was spent on other federal, state, and local level elections. Where does this money come from?

The majority is raised through contributions, many of which are collected through fundraising committees. The name of one of these committees might be "Friends of Candidate Joe Smith," and part of its charter would be to solicit, collect, and process checks from donors. Since 2002, there have been fairly strict regulations in place regarding how these committees need to report and track their donations.

"Ever since the McCain–Feingold Act (The Bipartisan Campaign Reform Act of 2002) was passed, it's become more important than ever for committees to be in full compliance with the law," said Kate Lind, president of **Aspect Consulting**, a Wisconsin-based firm which offers donations processing and campaign compliance services. "There are lots of things that can go wrong, and you

certainly don't want your candidate to take a media hit because your committee forgot to record something correctly or the books are not right."

As election campaign committees are typically grass roots, temporary efforts, their processes are usually fairly ad hoc. The committees typically photocopy each check that comes in, manually record donor information, total the donation amounts on a calculator or adding machine, and bundle the checks for deposit at a branch bank.

"Committees need to report certain contributions to the government within 24 hours of receipt," said Lind. "And, it's very important to make sure the database used for reporting matches what is being deposited. I started a compliance firm because I saw that technology could be used to help committees be more efficient. Our firm helps to get the burden of processing contributions off our clients' backs."

One of the technology tools that Aspect applies is iStream Deposit, a hosted remote deposit capture service from **iStream Financial Services**, a Milwaukee-area based payment processing specialist. When we spoke with Lind, Aspect was utilizing a check scanner and iStream Deposit to image and automate data capture from checks for four clients.

According to a press release about iStream, "iStream Deposit validates check amounts and bank routing numbers, searches for duplicate checks,

HURRAY FOR OMR

Even though the Florida presidential election count was almost too close to call once again, thankfully we didn't hear any controversy about "hanging chads" this year. If you remember, punch-card-like butterfly ballots were all the rage back in 2000 when George W. Bush defeated Al Gore in one of the closest presidential races in U.S. history. The Florida tally, which was compiled through a variety of balloting methods (including butterfly ballots) was the center of a controversy surrounding a recount. At the time, we cried out for more document imaging in the electoral process [see <u>DIR</u> 12/1/00].

While in my home state of PA we still use "black box" touchscreen voting [which has another whole set of issues], in 2007, the Florida state legislature passed a law requiring its counties to move to optical scan (OMR)-based technology. And this year, while there were reports of broken scanners slowing down the process and creating long lines at some polls, these issues seem to have been resolved without lawsuits or civil actions. And we have an easy to decipher paper trail, which should curtail any controversy about the outcome.

matches check MICR data to customer account numbers, exports data for reporting, provides an online system for managing returns, and supports custom data fields. Additionally, the solution includes standard integration into popular accounting systems, as well as custom integration into enterprise resource planning (ERP) systems."

iStream touts five benefits for campaign committees utilizing its technology:

- faster processing: During the recent Wisconsin governor recall election, Aspect used just three people to process more than 4,400 contributions a day for the Friends of Scott Walker committee. iStream Deposit can also scale to meet peak volumes. "We never could have manually processed that many contributions," Lind said. "Also, campaigns are cyclical in nature, but with iStream Deposit we are always ready [for peak volumes]."
- better reporting: In the day leading up to an election, campaigns are often spending money as fast as it comes in. They want to be kept posted on how much money is expected, so they can plan their media buys for the day. "With iStream, we can very quickly process the deposits and provide feedback on how much media a campaign can afford," said Lind.
- improved compliance: iStream makes it easier to separate corporate from personal contributions, which is a regulation.
- instant access to contributor information: It enables Aspect to more efficiently track who has

followed up on their commitments.

■ streamlined returns handling: Although rare for political donations, iStream enables a paperless check return process.

When we spoke with Lind a couple months ago, she was considering adding iStream's remittance processing services to automate capture of information from the donor slips typically included with contribution checks. "There are a couple pieces of information we need to capture from each donor," she said. "Those include their employer and occupation. Historically, we've been keying that into the database from the paper slip."

iStream has customers in a variety of markets including financial services, healthcare, and property management. It typically charges customers based on their transaction volumes. According to David Karcher, VP, national sales manager, for iStream, Aspect is its first customer in the campaign contribution market. "Fundraising is a new market for us, and while Aspen has kind of a niche business in Wisconsin, we think there has to be opportunity for its type of services all over the country," he said.

Concluded Lind, "iStream Deposit has completely changed the way we process contributions. We recommend it to all of our clients, whether they use it in-house or through our service."

For more information: http://www.istreamfs.com/; <a href="http:

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