Document Imaging Report

Business Trends on Converting Paper Processes to Electronic Format

February 4, 2005

CAPTIVA LAUNCHES ACTIVEX CAPTURE APP

Captiva has introduced a browser-based scanning application designed to facilitate remote scanning to *InputAccel* server applications. According to a Captiva spokesperson, *eScan*, which became available this week, "uses an ActiveX component, which permits end users to scan documents and/or pictures and assemble index information for submission to an *IA* server."

The product was internally developed and features a concurrent connection licensing model. "*eScan* is completely customizable (e.g. index fields of the user's choice)," said the spokesperson. "*eScan* can be fine tuned to provide the same look and feel as a customer's existing corporate intranet. The scope of an implementation will determine the actual cost."

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Morris Joins Visioneer

Former **Canon** document scanner marketing manager George Morris has joined **Visioneer** as a corporate sales manager. Visioneer will leverage Morris' experience in the document imaging world as it continues to make the transition from the consumer to the business market. Last year, the company introduced its first duplex workgroup models under the **Xerox** brand name. Indications are that Visioneer will continue to move upstream this year.

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Make sure to visit our blog "Document Imaging talk" at http://documentimagingreport.blogspot.com. Check out our spontaneous commentary and links to interesting news in the world of document imaging, ECM, and all things related. You can also reach it through our home page, which is now receiving almost 900 visitors per day. Just a reminder that we are always looking to add educational information to our site and that sponsorships are available. Thanks. -RG

Kofax, Adobe Partnership A Natural

The recently announced partnership between **Kofax** and **Adobe** represents an intriguing alliance between major players in the capture space. Kofax, of course, specializes in capturing images and data from paper, while Adobe specializes in capturing electronic documents and turning them into PDFs, as well as capturing data from PDF forms. Last month's announcement involved Kofax's commitment to integrate Adobe's *LiveCycle Barcoded Forms* application with its *Ascent Capture* platform.

Details of the integration are still coming into focus. Kofax officials indicated that it means *Ascent* will be able to capture securely encrypted 2D barcodes created by Adobe's *LiveCycle* app. "From our perspective, the press announcement was mainly to say there is a relationship between the two companies," said Anthony Macciola, Kofax VP of marketing and development. "Talking about too many details, such as pricing, would be premature."

Macciola did indicate that Kofax has no plans to resell Adobe's e-forms application, or any Adobe applications used to create the forms carrying the 2D barcodes. "Adobe offers a couple products to create the barcoded forms, and those are available to our channel through a number of different resources," said Macciola. "Will there be some cross-selling between us and Adobe? Sure, on a very shallow level. In fact, Adobe has signed up as a sponsor for our upcoming reseller event. However, Kofax is not going to be an e-forms player."

A couple years ago, Kofax announced a plan to resell Cardiff's *LiquidOffice* e-forms application. We always understood the agreement was driven more by Kofax parent **Dicom's** equity investment in Cardiff than any desire by Kofax to get into the e-forms market. Not surprisingly, that arrangement ended shortly after **Verity** acquired Cardiff last year. (Ironically, Adobe also had a venture stake in Cardiff [*see DIR 10/6/00*] and before Adobe acquired Accelio,

there was talk that Adobe was considering an acquisition of Cardiff [*see* <u>DIR</u> *2/15/02*].)

A Transitory Technology

Adobe's *LiveCycle Barcoded Forms* is interesting because it represents a hybrid between paper forms and e-forms. It offers some of the advantages of an e-forms solution, such as accurate data capture without the need to apply OCR/ICR and automatic calculation options. However, it also enables users to apply a written signature and to avoid submitting sensitive information online.

When Adobe announced the application at **AIIM 2004**, the **IRS** was announced as a pilot customer. According to Dan Baum, general manager for Adobe's paper-to-digital solutions group, the IRS has since upgraded to a commercial application and is planning on expanding the number of PDF-formatted 2D barcode-enabled forms it is offering. [*An IRS spokesperson confirmed this. Details can be found in an article on page 3*]. Last year, the IRS made three forms available on its Tax Products CD.

"Sales of our 2D barcode forms software have been about

THE BEGINNING OF A BEAUTIFUL RELATIONSHIP

We applaud **Adobe's** and **Kofax's** getting together. Their cooperation represents the potential merging of front and back-office capture into a single application. With its dominance of the PDF world, Adobe represents the future, front office-driven world of document capture. With its legacy of production back-office enablement, Kofax represents our industry's rich history. Merging these two areas is a great step towards creating enterprise capture environments.

In what other areas do we see these companies potentially getting together? Well, we've written about Adobe's interest in marketing its PDF tools in the document imaging space [*see* <u>DIR</u> *5/23/03*]. Long-time Kofax partner Fujitsu has already licensed some of these tools [*see* <u>DIR</u> *6/4/04*]. And, Kofax certainly has plenty of IP technology that could incorporate PDF. Also, a marriage between Kofax's *Capio* desktop imaging application and Adobe's *Acrobat* technology might create a killer desktop doc management application—plus it would provide Kofax with huge inroads into the desktop software market that *Capio* is aimed at. Finally, **Dicom's** distribution business could serve as an effective European channel for Adobe products, such as its e-forms applications.

In addition to technical synergies, we also like the cultural synergies between these two software vendors. Both have a legacy of technical success and have beefed up their marketing capabilities as they have grown. Of course, Adobe is considerably larger than Kofax. However, in its own market Kofax holds some pretty good sway. No, we don't expect Adobe to buy Kofax, due to the importance of Kofax within Dicom's business structure, but we do think this could be a successful partnership for years to come.

[*Please feel free to send you thoughts on this partnership to ralphg@documentimagingreport.com*].

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what we expected," Baum told *DIR*. "Our total number of customers is in the double digits, which includes some large deployments. Primarily, they have come in the government and financial services markets. Surprisingly, although we've initially marketed the product primarily in North America, we've also had quite a few international sales.

"Applications have come in areas like tax processing, homeland security, social welfare, and manually initiated fund transfers. Written signature requirements are a big driver. There are also situations where various users, including IT managers, are not ready to commit to a fully electronic workflow. Our 2D barcode solution provides a good starting point for someone considering a future transition to e-forms."

Merging Technologies And Channels

To date, most of Adobe's 2D barcode forms sales have been through its direct sales force. Baum said customers looking at ways to scan the forms began inquiring about vendors like Kofax. "Generally, Adobe has not worked with channels such as Kofax's," he said. "But this relationship really seemed to make sense. It will provide us with a way to offer customers a total solution for their forms."

Macciola added that working with Adobe will help provide Kofax with an important bridge into a world it does not want to address itself. "As we increase our focus on automating specific business practices, e-forms are going to come into play," he said. "Conversely, Adobe realizes that customers installing e-forms systems are not eliminating paper in many cases. We look forward to working with Adobe in a team-selling approach."

The two companies are currently working jointly to integrate their product lines and a solution is scheduled to be available by the second half of this year. Adobe's pricing for its *LiveCycle Barcoded Forms* application starts at just under $10,000. Baum indicated that Kofax will be free to set its own prices. Macciola added, "This is probably not going to be a mass channel-oriented product for us. We're not going to try to market it through resellers selling $1,000 scan licenses. This will be targeted at our upper tier resellers to whom a $10,000 plug-in is not going to be an issue."

Macciola added that he sees some synergies between Adobe's 2D bar code technology and Kofax's other data and image capture product lines. "*Xtrata*, for example, can be used to process forms, which might not, due to reasons pertaining to control, have the 2D bar codes printed on them. And of course, *Ascent* can be used to capture general correspondence documents that might be associated with forms."

As far as future synergies between the two companies, in areas such as PDF and image capture, both companies indicated more was in the works, but declined to discuss the topic further. "This is the first step in a number of things we can do," said Baum. "To this point, working with Kofax has been a very positive experience for us. We are also open to potential partnerships with other capture vendors."

For more information:
http://www.adobe.com/products/server/barcodedpaperforms/main.html

IRS Ramping Up Barcode Project

This year, the **IRS** plans to process several million 2D barcoded tax forms after getting the ball rolling last year with a pilot program. Last year, three 2D barcoded Schedule K-1 forms were available on a limited basis. This year, the IRS has "permanently adopted" the technology for two Schedule K-1 forms, the 1120S and the 1065S, as well as a third form, the 8823.

"A lot of states are adopting 2D barcode technology for their tax returns," said Paul Showalter, senior publishing analyst in the IRS' Media and Publications Division. "They were having success, so we decided to try it. The pilot was fairly successful, although the barcodes took a little longer to process than we would have liked. We've corrected that problem this year by reducing their size."

The IRS publishes specifications for the barcodes that can be utilized by tax software vendors. The IRS also makes its own PDF forms available that incorporate the 2D barcodes. This year, barcoded forms will be available from the IRS both online and on its Tax Products CD.

"Eventually, we would like everyone to file electronically," said Showalter. "But for a litany of reasons, we expect to continue to receive paper forms. To improve our paper processing, we've started barcode-enabling some of the simpler, more straightforward forms. We have a total of 500-600 forms, and I don't see any reason why this technology couldn't be applied to most of them. Granted, we are transitioning some of the business forms to strictly electronic filing, so those will be eliminated. And some of the forms have designs that won't permit a 2D barcode to be included. However, redesign is a possibility."

For more information: http://www.irs.gov

Helping Physicians Navigate The EMR Landscape

On-line service matches practices with appropriate software applications.

Over the past two years, the influence of HIPAA has helped electronic medical records (EMR) become one of the hottest OEM areas for document imaging software. For awhile, it seemed we saw a weekly announcement involving an EMR vendor embracing document imaging. According to orthopedic surgeon and software reseller, Eric Fishman, M.D., there is good reason for this. EMR is a hot market and document imaging is increasingly becoming a must-have component. "The majority of EMR applications now offer document scanning," he told *DIR*. "In the not-so-distant future, no top-tier product will be without it."

It's in Fishman's business interests to keep track of such trends. Last fall, he launched **EMRConsultant** (http://emrconsultant.com), an online business for connecting prospective EMR users with vendors. As of last week, EMRConsultant had advised more than 1,100 physicians groups, leveraging a database containing information on more than 200 vendors.

Fishman, who is based in Palm Beach Gardens, FL, came up with the idea for EMRConsultant while driving home from last February's **HIMSS** (**Healthcare Information Management Systems Society**) show in Orlando. "At the show, I realized there was a tremendous demand for EMR," he related. "So initially I thought about becoming a reseller."

But Fishman, who for 10 years has sold voice recognition technology primarily to physicians for transcription applications, didn't see how he could do EMR users justice. "Throughout the years, I've had access to almost every voice recognition technology that has been available," he told *DIR*. "At various times, I've worked with products from Kurzweil, Philips, Dragon, **ScanSoft**, and a few others that have come and gone. That market has consolidated and ScanSoft's Dragon *NaturallySpeaking* has emerged as the winner. I now recommend it 95% of the time.

"Today's EMR market is much more fragmented. And, because the applications are more complex than voice recognition by an order of magnitude, it would be impossible to become an expert on more than one or two. The requirements of physicians' offices are too diverse for that model. Take two doctors who went to the same med school and did their residencies together. If you put them in practice, six months later, they might have completely different types of EMR requirements based on variables like the size of their practice and the types of records they are working with."

To provide physicians with a full perspective of EMR vendors and technology, EMRConsultant maintains a database of information on available applications. "Most of our information comes from questions that EMR vendors respond to," said Fishman. "We also require demos. Currently, we are in correspondence with approximately 100 vendors whose products we will recommend depending on the situation. We are always looking for new vendors as well."

> **"If someone comes in who's been shot, you treat them no matter what. Sometimes you get paid, sometimes you don't, but at the end of the day, you are profitable."**
>
> **- Dr. Eric Fishman**

In addition to document imaging, key EMR functionality includes test and lab results management, order entry, decision support, electronic communication and connectivity, compatibility with speech recognition, patient support, and administrative support. On the physicians' side, EMRConsultant takes into account the number of physicians in a practice, the practice specialty areas, and technology and applications already in use.

According to Fishman, EMRConsultant deals with a wide range of physicians groups. "The largest number of requests comes from groups of one to three physicians," Fishman told *DIR*. "However, the largest group we've dealt with has 4,400 physicians. This morning I received a request from a group of 40 physicians."

After submitting their information, physicians groups typically receive a response within 24 hours. "One of our employees compares our service to [the dating match site] **eHarmony.com**," joked Fishman. "Vendor names are automatically chosen based on the information in our database. Then we have a person check the recommendations to make sure they're on target. Typically, we'll recommend three to five vendors, although for very unique cases, there might only be one. In some cases, if a user's expectations and pricepoint are unrealistic, there

might be none.

"We'll never recommend more than six, because part of our job is to help physicians narrow their choices. They can find a complete list of EMR vendors through their own searches. After we provide our recommendations, we will stay in touch and often provide additional vendors based on feedback. A user might choose one vendor from our list and ask for names of other similar vendors."

EMRConsultant does not charge physicians. It earns revenue through deals to collect a percentage of software sales from the vendors it recommends. "That does not mean we only recommend software vendors that have referral agreements with us," stressed Fishman. "Our credibility is too important. I look at it like being a surgeon in the emergency room. If someone comes in who's been shot, you treat them no matter what. Sometimes you get paid, sometimes you don't, but at the end of the day, you are profitable."

When we spoke with Fishman, EMRConsultant had yet to reach that "end of the day." "We have made a good number of recommendations to people who have not bought applications yet," he said. "When these purchases are made, we expect to realize some significant revenue."

According to Fishman, reliable sources he's seen rate EMR adoption anywhere between 5% and 18%. His personal experience is that general and family practitioners are leading the way. Fishman was not comfortable predicting the rate at which adoption will increase. He did say, however, he expects government and insurance companies to step up their encouragement of physicians to transition to electronic records.

"Practices can receive some direct benefits from EMR by using it to automate processes like records retrieval, scheduling, and re-filling prescriptions," said Fishman. "It also helps them meet HIPAA requirements. However, the big savings are potentially realized by the payers. They benefit because a good EMR system helps eliminate errors and duplication of services. For example, if you have an electronic record of a blood test that can be accessed online, there is no need to repeat the test at each specialist a patient visits."

Fishman said various government organizations are currently offering financial incentives for physicians who can prove they provide a high quality of care. "The caveat is that to show this proof, they typically need a good EMR system," he said. "I eventually expect insurance companies to start offering higher rates to physicians who can provide similar proof of

high-quality care."

For more information: **EMR Consultant**, Palm Beach Gardens, FL, PH (888) 519-3100, FX (561) 630-0375.

Captiva Nails Second Digital Mailroom Sale

Captiva recently announced its second major *Digital Mailroom* (*DM*) application sale. This one is to **CUNA Mutual**, a leading financial services provider to credit unions. CUNA has used *InputAccel* for document capture since 1999 and purchased the *DM* application to service a newly acquired business. CUNA's initial deployment of *DM* will be for processing approximately six million pages per year.

CUNA will pay Captiva approximately $1 million for software, services, and maintenance of the *DM* application over a three-year period. The revenue was recorded in Captiva's fourth quarter of 2004, which also included a $2 million sale to **Wal-Mart**. These two deals helped push Captiva's quarterly revenue to a record total of approximately $20 million, including software revenue of around $11.5 million. Captiva's pre-reported annual 2004 revenue was more than $67 million. Full details are scheduled to be announced this week.

The CUNA *DM* application involves the capture and automatic indexing of proof-of-insurance documents related to motor vehicle loans. "Through the credit unions that are CUNA's customers, CUNA offers loans for things like automobiles, trucks, and boats," explained Blaine Owens, Captiva's VP of enterprise solutions. "Because the vehicles are used as collateral, CUNA requires proof they're insured. This documentation is sent from insurance companies either directly to CUNA or to the credit unions that broker the loans. The credit unions forward their documents to CUNA's document processing center in Madison, WI."

Six million pages worth of these documents come in annually through a combination of fax and traditional mail. "CUNA wants to capture between 8-12 indexing fields from each document," said Owens. "This includes items like name, amount, and VIN numbers."

The company that CUNA bought had been capturing this information with a traditional forms processing application. "CUNA deals with more than 800 different insurance companies, each of which has its own forms," said Owens. "As a result, this business was maintaining a large number of

templates to enable automated data capture. With *DM*, CUNA has eliminated templates.

"One of the reasons, CUNA decided to install *DM* was to standardize on a single capture architecture throughout its organization. Another reason was to eliminate the administrative burden associated with maintaining all those templates."

So, initially at least, *DM* is being used as an unstructured data capture application by CUNA rather than the document classification and routing application it was originally conceived as. "We are finding that a certain amount of data capture, mostly on the indexing level, is becoming a standard requirement of *DM* installations," said Owens.

To help capture this data, Captiva is leveraging technology from French partner **SWT**. "Because CUNA was already using forms processing software, they were very suspicious about our application's ability to capture indexing data without templates," said Owens. "As a result, we went through a laborious sales process that involved testing our application in their environment with their documents. In addition to *DM's* automated capture, CUNA liked its ability to provide visibility into things like how many documents from a given insurance company arrived at a particular time."

Owens expects CUNA to go live with *DM* in February. He added that the *DM* application is not limited to the initial deployment. "CUNA's vision is to evaluate the *DM* technology in the new application and determine how it can potentially benefit the company's existing capture application or be used in new areas," said Owens. CUNA's legacy *InputAccel* installation captures 18.6 million pages annually in the areas related to human resources, insurance applications, and general mail.

"DM's ability to automatically process electronic documents such as e-mail and attachments was also important to CUNA's senior staff," said Owens. "CUNA is not going to use that ability initially, but its potential was part of the justification for the sale. CUNA is also considering implementing *IA's* remote capture capabilities [*see story on page 1*] as part of the *DM* application. This would enable credit unions to submit digital images of the proof-of-insurance documents they receive—eliminating the need to forward these documents to CUNA and for CUNA to send them back."

Digital Mailroom Gaining Traction

Yes, like much we've heard about digital mailrooms so far, CUNA's initial implementation of *DM* technology falls a bit short of the digital mailroom hype. However, at least it appears to be a truly template-less IDR (intelligent document recognition) implementation. If you remember, for years, semi- and un-structured forms processing applications of this type also fell short of their hype.

Based on this installation and several others we have covered in the last year (both for this publication and for *Transform* magazine), it seems IDR is for real. It's our contention that the digital mailroom is a natural extension of IDR, and we expect it to evolve from the hype to reality stages over the next few years. To validate this vision we hope to talk with CUNA and other end users for an article in a future issue.

Oh yeah, and the $1 million and $2 million price tags Captiva has been able to command for *DM*-related applications are no coincidence. Digital mailroom technology has the potential for taking document imaging from primarily a line-of-business implementation, to a truly enterprise-wide application. And enterprise applications always command more money than departmental ones—just ask SAP.

For more information:
http://www.captivasoftware.com/products/digitalmailroom.asp

Mid-Market Offers Opportunities For Growth

Although **Hyland** recently withdrew its IPO filing [*see DIR 12/17/04*], the S-1 form it filed with the SEC shed some light on the financials of one of the more successful value-added-reseller-oriented vendors in the document imaging space. The company's 40% growth rate in 2003 and close to 30% growth through the first half of 2004, coupled with 17% operating margins are good indications of the spoils of running a successful reseller program—especially when compared to direct-sales-driven **FileNET's** 9% growth and 6% margins in 2004.

Although their numbers haven't been documented as clearly as Hyland's, other VAR-oriented imaging software vendors have indicated they've experienced similar success over the past couple years. This includes the likes of **Kofax**, **Westbrook**, **IMR** (now owned by **Captaris**) and **DocuWare**. When you factor in the explosion in sales of workgroup (sub-$2,000) scanners over the past couple of years, indications are that the SMB (small-to medium-business) space, typically serviced by VARs, is a very healthy segment for document imaging sales.

Westbrook CEO Sean Donegan is a former reseller himself, and he recently shared with us some of his

thoughts on this recent growth in SMB sales. "Part of it has to do with the endless amount of opportunities in the SMB segment," Donegan told *DIR*. "Larger vendors, who sell direct, focus on Global 2000 corporations. But, there are a limited number of those types of businesses. The SMB space is a different story."

ISVs, Copier Dealers Embracing Imaging

Donegan explained that there are three types of resellers his company typically works with:

■ "First, there are the true boutique systems integrators. These are the traditional document imaging VARs that have between a couple employees and a couple hundred employees.

■ "There are also the crème dele crème of the copier dealers. Some of the larger ones have the ability to dominate a geographical area.

■ "Finally, there are ISVs that want to add document management as an extra feature for their existing customer base and use it to differentiate themselves when going after new customers."

Over the past couple years, Donegan acknowledged there has been a significant increase in document imaging interest from the latter of these two categories. "One of the things that makes the ISV-types so successful is their legacy of addressing specific business problems," Donegan told *DIR*. "Instead of going to general technology shows like AIIM, for instance, they typically focus on established vertical customer bases. They show up at venues like police chief shows, for instance, or AP management shows, or even something like a funeral home directors' show.

"This gives them a couple advantages. First of all, they know exactly who they are talking to and understand their specific business problems. And once those problems are solved, they have a beachhead to sell into other areas in the business."

According to Donegan, the opportunity to upsell to existing customers has historically been "tremendously overlooked" by imaging resellers. "Because of the limited amount of new business opportunities at the high-end, vendors like **Documentum** and FileNET make the great majority of their revenue from their existing customers," said Donegan. "They are the recognized leaders in our industry for a reason. Granted, part of the beauty of the mid-market is the number of new opportunities. However, that doesn't mean you can't profit from farming your existing customers. In fact, it's stupid to overlook them. I'd go as far as to say that half of a reseller's sales staff should be spending time on the phone with existing customers."

Donegan noted that the transition to this "radiate and permeate" strategy can be a challenge—even for businesses like copier dealers that have traditionally built their revenue stream through maintaining customer relationships. "Most copier dealers are used to 30-day sales cycles, and once a sale is made, they don't visit their customers again until the lease is up," he said. "With document management software, the sales cycle is longer. However, once you make the sale, there is a wider basket of goods and services that can be sold on top of it. This includes items like maintenance, training, and additional software."

According to Donegan, the key to making add-on sales is as simple as good customer service. "Back in the days when **IBM** dominated the computer business with its mainframes, the attitude was to create a proprietary world so that customers couldn't go anywhere else," he said. "Now, with systems being more open, the differentiation becomes how well you look after your customers. How often are you on the phone telling them about new products and services? How often are you asking them about their colleagues using the product?"

Our conversation with Donegan came in the wake of Westbrook's announcement of an expanded reseller program. According to Donegan, Westbrook has set a goal of increasing the number of its North American resellers from 120 to 150. "Of course, we are always trying to refine the quality," he said. "Just by increasing your percentage of high performers by a few points, you can substantially increase your revenue."

The expanded program includes an improved support team of regional sales managers, as well as weekly Webinars targeted at end users. "The Webinars are short, maybe 20 minutes, and might introduce customers to new features of our product," said Donegan. "They provide an additional point of contact for our resellers. Part of our goal is to fill up customers' dance cards with Westbrook appointments, so our competitors don't have a chance to get their feet in the door."

Donegan added that Westbrook's willingness to offer resellers 60% margins on software maintenance fees is also a differentiator.

Donegan concluded by saying the concept of ECM (enterprise content management) is not restricted to the Fortune 500 anymore. "Over the past couple years, we've seen more mid-market enterprises adopting document management as a standard throughout their businesses," he said.

For more information: http://www.westbrooktech.com

IBM Boasts Strong ECM Sales

IBM recently posted some gaudy revenue numbers related to its Enterprise Content Management (ECM) suite of products. Big Blue announced that for the fourth quarter of 2004, its ECM-related revenue grew 31% over the previous year's fourth quarter. This followed third-quarter growth of 56%. IBM also boasts that both **Gartner** and **Ovum** have recognized it as the leading content management software vendor in terms of new license revenue in 2004.

So, what makes IBM so successful in the ECM market? According to Theresa O'Neil, director of content management for the IBM Software Group, the company's ability to address both line of business problems and enterprise infrastructure requirements gives it an advantage. "A lot of ECM customers are starting to look to us to provide a complete information infrastructure," she told *DIR*. "We have an advantage over most document and content management software vendors because we can provide a database to manage structured data as part of that infrastructure. We also have technology that can make multiple unstructured content repositories look like a single repository. Further, we offer advanced technology in areas like search and business intelligence to compliment our repositories and databases."

While last year IBM seemed to focus on applications targeting specific business issues, this year's early focus seems to be on infrastructure. O'Neil indicated that upcoming new releases in the areas of content and document management will focus on standards like XML and JSR 170, which are designed to make information more usable across several applications. She added that IBM will be hitting another market hotpoint by upgrading its embedded BPM functionality.

Finally, she said the company's content management and e-mail management applications will be upgraded to take advantage of the new functionality IBM recently introduced in its *DB2 Records Management* application [*see DIR 10/22/04*]. "Those upgrades deal mainly with automating the declaration and classification of records," she said. "Some of our customers have hundreds of thousands of records they deal with daily. Automating their declaration and classification not only saves time, it ensures records management policies are applied consistently."

In an interview with *DIR* last October, Bruce Miller, IBM's records management guru, indicated that initially, the automation would be based on meta and header data from documents, but that more complex content analysis tools were in development. "You will be hearing some future news from us in this area," assured O'Neil. "In addition, you will be hearing news about applying records management across multiple repositories by leveraging some of the technology we acquired with Venetica [*see DIR 9/3/04*].

O'Neil added that an announcement regarding the automatic classification and declaration of e-mail records would also be forthcoming.

For more information:
http://www-306.ibm.com/software/sw-bycategory/subcategory/SWB40.html

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