

Document Imaging Report

Business Trends on Converting Paper Processes to Electronic Format

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March 3, 2006

THIS JUST IN!

RICOH EMBEDDED APP FINALISTS

Ricoh Corporation, along with **Sun Microsystems**, recently announced the Commercial Solution finalists in its \$100,000 developer's challenge. Eight vendors were named for their work with the Ricoh Embedded Software Architecture platform. The platform represents Ricoh's answer to Canon's MEAP and judging from the number of finalists, it seems to be gaining decent market traction. Representing the document capture and imaging space among the finalists are **eCopy**, **Notable Solutions**, **Omtool**, **IPro Tech**, and **Acris Paperless Solutions**.

Ricoh is offering a \$50,000 marketing fund, plus some other amenities for first prize. Second and third prizes are also being awarded. There are some in the industry who believe that scanning from digital copiers will not hit it big time until it becomes an easy-to-use solution that can be managed from the touch-panel. This contest is also a good sign that Ricoh plans to support its scanning partners.

<https://developersupport.ricohcorp.com/contest.asp?choice=contest>

Sharp Debuts OSA

On a related note, at its recent dealer meeting in Las Vegas, **Sharp Document Solutions Company of America** debuted its OSA (Open Systems Architecture) embedded platform for MFPs. **Kofax**, **eCopy**, and **Liberty IMS** were among those previewing solutions.

<http://www.sharppusa.com/documents>

DIR Web Site Traffic Up

Just as a heads up, our Web site, <http://www.documentimagingreport.com> averaged almost 6,000 visitors per day for the month of February. This is approximately a five-fold increase from February 2005. We'd like to thank all our sponsors who have contributed materials that help us show up on more search queries. We'd also like to thank those of you who visit regularly.

Cardiff Gets New Lease On Life

Rumors of the demise of **Cardiff Software** have been greatly exaggerated, at least according to Mark Seamans. Seamans, a long-time Cardiff employee and most recently the senior VP of research and development at **Verity**, has been appointed general manager of the re-launched Cardiff division of **Autonomy**. Despite assertions that Cardiff has been doing well since being acquired by Verity in 2004, Seamans seemed excited to get the San Diego-based capture software vendor's products out from under the Verity brand and back on their own two feet. The re-launch comes in the wake of the closure of a \$500 million acquisition of Verity by Autonomy.

"There is a tremendous amount of equity and goodwill built up around the Cardiff brand," said Seamans, who has been with Cardiff since 1994. "Autonomy recognizes that; unlike **Oracle** or **IBM**, Autonomy does not dictate that every division goes to market under the parent's brand. For example, the Autonomy Group has a call center software business, **etalk**, which it acquired last year. etalk has added some of Autonomy's core search technology to its platform and continues to operate in Dallas, under its own brand, with several hundred employees. We plan to follow a similar model. We will maintain our offices in San Diego and have our own branding, sales force, and product messaging and advertising."

This is quite different than the model under which Verity tried to run Cardiff. Almost immediately after that deal closed, the Cardiff brand was done away with and several top executives left, including CEO Dennis Clerke. Despite conflicts such as Verity being primarily a direct sales-driven company and Cardiff having been built primarily through a reseller channel, Seamans said Cardiff's sales did not suffer during the past two years.

"The market for capture software is thriving as end users have finally recognized paper is not going away," said Seamans. "Customers have realized the importance of automating their paper processes and

uniting them with their digital ones. You've seen this trend manifested in the growth that **Captiva** had and in the valuation **EMC** placed on that business before acquiring it [see *DIR* 11/4/05].

"Over the past couple years, you've seen the rich get richer in the capture industry. In 2004, **Kofax**, **Captiva**, and **Cardiff** were recognized as the top three players in the market, and I don't think that has changed. Our growth has been fueled by strong product releases of both our *TeleForm* and *LiquidOffice* lines, as well as some of the accelerated reach we received from working with a company the size of **Verity** [approximately \$150 million in annual revenue]. We leveraged a lot of cross-selling opportunities, where otherwise we would have had to start from scratch."



"Autonomy is all about unstructured information. Autonomy brings too much to the game in that area for us to stay on the sidelines [in terms of IDR] much longer."

– Mark Seamans, Cardiff

Autonomy an attractive partner

Seamans went on to say that Cardiff's relationship with Autonomy puts it in better position going forward than either of the two rivals he mentioned. "**Dicom** [which acquired Kofax in 1999] was primarily a distributor. That is not nearly as strategic an alliance as Cardiff's relationship with a billion dollar software company like Autonomy, whose stock value increased by 175% last year. And EMC may be a leader in storage, but I don't think they bring the same level of support to Captiva that Autonomy brings to us."

To editorialize for a minute, it seems Seamans is saying that while Kofax and Captiva are being looked to as technology leaders within the companies they have joined, Cardiff has a chance to ride the coattails of somebody else. In other words, Cardiff is not a big fish in a small pond technology-wise.

How well this plays out remains to be seen. Arguably, the Verity acquisition should have had similar benefits for Cardiff, but most insiders say it didn't really do too much for the company. Seamans disagrees. "While we weren't out there beating the drum, we were quietly closing a lot of business and doing some great projects. Now that we've re-established our own brand and Web site, we plan to start putting out some more press releases and marketing collateral. That will increase market awareness."

BPM: Glue That Binds Products

One thing Verity did do for Cardiff was provide it with the *LiquidBPM* business process management line. *LiquidBPM* was picked up through the \$8 million acquisition of Dralasoft

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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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last year [see *DIR* 1/21/05]. The BPM product appears to be the glue that has finally tied together Cardiff's legacy *TeleForm* forms processing business with the controversial *LiquidOffice* e-forms line the company launched in 2001 [see *DIR* 4/6/01].

"A lot of our higher volume customers want to combine both their paper and digital transactions in a single system," said Seamans. "Instead of just capturing data, they want to verify it and route it for approval. This is where BPM fits in."

Jean Krahulec, a former Verity executive who has been appointed senior product marketing manager for Cardiff, further explained the integration. "Many businesses have talked about replacing paper processes with Web-based ones," she said. "They forget that 50% of Americans don't even have a Web connection. Businesses often end up with two completely separate processes for paper and Web-based forms. By leveraging our BPM technology with both our paper capture and e-forms front ends, we can unify these processes. We create a situation in which it doesn't matter if it's a paper or electronic form, it goes through the same processes."

Cardiff has further brought its two forms product lines together by introducing a less-expensive version of *LiquidOffice* aimed at the channel. "Initially, we had to prove *LiquidOffice* in the market ourselves and determine some successful sales strategies," said Seamans. "We had to blaze a trail so VARs could ride our coattails. Now that we've discovered what works, we've introduced a \$15,000 version that is more attractive to resellers."

According to Seamans, approximately half the company's business currently comes through a channel of a couple hundred VARs. "That's a ratio we'd like to maintain. We have plans to expand both our reseller and direct sales business."

IDR offering on the way

One of the reasons Cardiff was initially criticized for going after the e-forms market was because, at the time, the company seemed to be ignoring the rapidly growing intelligent document recognition (IDR) space. Seamans indicated this oversight will be corrected in the near future. "Autonomy is all about unstructured information," he assured us. "Autonomy brings too much to the game in that area for us to stay on the sidelines [in terms of IDR] much longer."

In fact, in 2004, Autonomy announced an alliance with Captiva to provide some advanced document classification technology for its *Digital Mailroom* application [see *DIR* 4/9/04]. About the same time, Captiva was also developing its relationship with

French IDR specialist SWT. Last year, Captiva ended up buying SWT, and we are not aware of a single install Captiva has done with Autonomy. It would seem likely, however, that Autonomy has already done a lot of the legwork to create a document classification application that could be leveraged by Cardiff.

Seamans concluded by saying that the re-launch of Cardiff should not be looked at as a prelude to Autonomy's spinning-off the organization. "The re-launch never would have taken place had Autonomy's acquisition of Verity not occurred," he told *DIR*. "I've been with Cardiff a long time, and it feels good to have our old name and brand back. However, it doesn't make sense for Cardiff to break away from Autonomy. Both of Cardiff's primary markets, document capture and BPM, are growing quickly, and both can leverage the technology and infrastructure that Autonomy brings to the table."

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

Weighing RM Priorities

Why do file systems take a back seat to e-mail servers?

Last month, we were talking with Randolph Kahn, esq., founder of **Kahn Consulting** and author of three books on the topic of records management (RM). We asked why today's RM and e-discovery discussions always seem to center on e-mail, and whether other types of documents aren't just as important. Kahn had a trip scheduled to South Korea, and we made plans to touch base when he returned. Coincidentally, in the meantime, **FileNet** introduced an application it is calling *Records Crawler* that is aimed at file systems and offers to "control and audit the records declaration process." So, obviously, FileNet, which manages some huge file systems at Global 2000 businesses, is seeing some demand for RM outside of email.

Out of curiosity, we asked Craig Rhinehart, FileNet's director of compliance markets and products, just how big this opportunity is. "The two biggest areas of risk concerning records and litigation are email and other unmanaged forms of content on networks," said Rhinehart. "The common denominator between the two is that users typically control the files and typically don't manage them the way their companies would like them to. In my opinion, email has received way too much of the spotlight, probably due to its use as a messaging medium as well as a content repository. It seems to me like unmanaged file systems can be just as big an issue."

To back up his position, Rhinehart sent us several examples of businesses that had been penalized due to mismanagement of records in their file systems. This included the likes of **Freddie Mac, Dell, Wal-Mart, and Prudential**. Penalties ranged from executive resignations, to escalating defense costs, to paying plaintiff court costs, to, in Prudential's case, a \$1 million fine for spoliation for destroying electronic documents while under a hold/freeze order. Yes, it seems that file systems can be as big a problem as email.

When we caught up with Kahn, he concurred that indeed "email is the 800-pound gorilla in the room." "So far, it has been the source of the greatest embarrassment and the greatest expense, inconvenience, and hardship as related to litigation. However, there are all sorts of cases, and all sorts of talk you hear about laptops, desktops, and shared files being the basis for institutions failing to comply with discovery requirements or even being accused of destruction of evidence. Institutions are ubiquitously mismanaging pretty much every kind of record."

Kahn believes businesses should leverage the same type of electronic document management technology they use to operate "better, cheaper, and faster," to become more compliant with legal and regulatory mandates. However, he pointed out there is some justification for email getting the lion's (or should we say gorilla's) share of the early RM attention. "One of the greatest failures I see in RM is attempting to boil the ocean and take on everything at once," he told *DIR*. "The prudent approach takes into account risk management. In other words, organizations should pick the problem that is causing the greatest headache and hardship, solve it in earnest, and solve it from multiple angles. Only after that problem is completely addressed, if they still have any enthusiasm left over for RM, should they move on."

Auto-classification eases user's burden

FileNet seems to be taking such a step-by-step approach to RM—at least from the vendor perspective. In the fall of 2003, the company first debuted its records management application. In early 2005, it introduced FileNet *Email Manager*, which was tightly integrated with RM and has the ability to automatically classify and store emails as records. *Records Crawler* transfers the same auto-classification techniques to the file system.

"What makes *Records Crawler* different than a search engine is its ability to initiate an action, such as designating a file as a record," said Rhinehart. "For example, *Records Crawler* could

enable you to gather all your spreadsheets related to your 2004 budget and automatically set a deletion date for the end of 2011, if that fits with your company policy. It will also eliminate any duplicate files and create pointers to a master file from the location of these duplicates. This is important because *Records Crawler* is applying RM controls without disrupting the way people perform their work and locate their files."

According to Rhinehart, at one beta site, a customer found 1,200 copies of the same document in its network file system. "This included five different versions; so they were storing 1,999 unnecessary copies, as well as four unnecessary versions of this document," he told *DIR*. "In addition to the RM benefits of reducing that to a single controlled copy, there are also significant storage benefits that can be factored into an ROI."

ARMA, Kahn Offer RM For Everyman

Kahn Consulting and **ARMA International** have launched a new training program called *Keeping Good Company* aimed at improving records management throughout organizations. The program features a DVD that includes interviews with top executives from Global 2000 organizations who discuss their records management challenges and solutions. It is designed to be presented by the organizations that purchase it. The target audience is almost every employee.

"Unlike other records management programs aimed at making experts more expert, *Keeping Good Company* discusses how the fundamentals of records management relate to every employee—from top executives down to hourly wage workers," said Randolph Kahn, principal at Kahn Consulting. "The program increases awareness about topics like proper handling of electronic documents, how long documents should be kept, when and if they should be deleted, how they should be stored, and how to respond in cases of litigation. We are trying to drive accountability and compliance from top to bottom."

The video features appearances by chief counsels, records managers, and compliance officers from the likes of **Kraft Foods, EMC, Bristol-Myers Squibb, Freddie Mac, Time Warner Cable, Dun & Bradstreet, and Takeda Pharmaceuticals**. U.S. Magistrate, the Hon. Ronald J. Hedges, is also featured. In addition to the video (which is broken down into four parts), training and testing manuals come with the package. The current list price is \$790 for ARMA members and \$890 for non-members. That will go up by \$200 after Aug. 31.

For more information (including a video trailer): <http://www.arma.org/learningcenter/goodcompany/>

Rhinehart noted that *Records Crawler* has been designed to leverage the same commands and rules that users create for *Email Manager*. "You can also set up *Records Crawler* to monitor your network for new versions of specific types of files, which it will then capture as records when they are created," said Rhinehart.

Records Crawler can also be used on desktop drives in special cases, such as when an employee leaves a company. "Currently, it would be impractical to use it on every desktop in a corporation," Rhinehart acknowledged. Kahn pointed us to a pair of vendors, **PSS Systems** (<http://www.pss-systems.com>) and **StoredIQ** (<http://www.storediq.com>) that are currently doing work with corporate desktop and laptop records management.

FileNet's *Records Crawler* is available now and works in conjunction with the FileNet family of products. "We have no plans to enable our competitors to use it to make their products more powerful," said Rhinehart.

For more information: <http://www.filenet.com>,
<http://www.kahnconsultinginc.com/>

SIRE Sires IDR For Clerks

Salt Lake City-based developer focuses on county and municipal governments

In our past couple issues, we've featured topics like vertical market focus, name changes, and IDR (intelligent document recognition). In this story we are going to cover all three of those areas, as we discuss a new product release from **SIRE Technologies**. SIRE, based in Salt Lake City, UT, recently re-branded itself and has released a new IDR-based capture application specifically targeting municipal and county clerks.

SIRE was formerly known as **AlphaCorp**, which was a name shared by a sister company focusing on security systems. "Our document imaging product suite is known as *SIRE*, and, for the most part, our clients recognized us as the *SIRE* guys," explained Kris Painter, executive VP of SIRE. "We felt it was simpler if we called ourselves by that name." The security systems business, which is owned by the same corporation, has maintained the AlphaCorp moniker.

AlphaCorp was founded in 1983 and has been selling document imaging solutions since the early 1990s. "We started out as a reseller and represented products from a number of vendors including **TAB**,

Optika, Keyfile, and Trimco [now **Altris**]," Painter told *DIR*. "Eventually, we developed some of our own libraries and decided to base a product on those." That product became the *SIRE* suite, which now features capture, repository, COLD, and workflow capabilities.

SIRE estimated that, for a five-page document with six index fields... it takes two minutes for a clerk to perform manual data entry. With *Auto Index*, SIRE claims to reduce that to 17.5 seconds.

The company sells primarily direct and has approximately 300 document imaging customers. According to Painter, 85% of those are local governments. "We compete mainly with **Laserfiche** and *ApplicationXtender* resellers," he told *DIR*. "We focus on municipalities with a population of 30,000 or higher. We also have contracts with some state organizations, such as the **Utah Transit Authority**, the **Florida Office of the Attorney General**, and the **Supreme Court of Nevada**." [Editor's note: According to a story we did in 2004, there are approximately 6,800 municipalities in the United States with populations of 10,000-250,000. Laserfiche boasts more than 1,300 installations in that space.]

"We've averaged 30% annual revenue growth over the past five years," added Painter. "It's a combination of new and replacement systems." To stimulate this growth, in the 2003-2004 timeframe, SIRE introduced its *Agenda Plus* module. This module specifically manages the creation of agendas for government meetings. [Incidentally, our 2004 story was sparked by Laserfiche's release of a similar module. See *DIR* 9/3/04.]

"*Agenda Plus* creates an electronic workflow for the submission of materials from various departments," said Painter. "If a municipal council is having a meeting on widening a road, for example, it probably needs input from at least the legal, finance, and city management departments. In addition to preparation, *Agenda Plus* can be used to record minutes. It can then be used after a meeting to post the minutes and related information online for public consumption; this includes relevant video clips."

SIRE director of marketing Matthew Bowman points out that, while *Agenda Plus* is a great product to lead with, SIRE will often service several departments within a municipality or county.

"Ultimately, we will work with everything from public safety, to the treasury, to planning and development departments," he said. "We offer our modules à la carte and configure them to meet our customers' needs."

To integrate with municipal governments' line-of-business applications, SIRE has introduced an API toolkit based on .NET standards. "Some of the applications we integrate with include case management systems in police departments and PeopleSoft HR systems," said Painter.

Reducing data entry effort by 83%

Most recently, the company announced an *Auto Index* module for capture. The module is aimed directly at county and municipal clerks who deal with thousands of real estate documents per day. "On average, they receive approximately 100 document types that come from a variety of sources; there is no way to automate data entry with templates," Bowman told *DIR*. "Historically, processing these documents has involved a lot of key entry."

SIRE estimated that, for a five-page document with six index fields, on average, it takes two minutes for a clerk to perform manual data entry. With *Auto Index*, SIRE claims to reduce that to 17.5 seconds. "That's a reduction of 83%, which adds up when you're dealing with thousands of documents per day," said Bowman. "In addition, because it can automatically validate everything against a user's databases, *Auto Index* approaches 100% accuracy, which is hard to achieve manually—people make mistakes."

The application is optimized to work on forms such as deeds, levies, liens, loan forms, etc. "We first apply full-text OCR and then a series of rules that can identify the class of document and capture data from correct fields," said Bowman. "Some of these fields might be a paragraph long, like a legal description; others might only be a number."

Bowman gave us an example of how the database integration works. "Once we capture a sidwell [parcel identification number] on a particular form, we can retrieve the correct address information from the customer's database," he said.

SIRE looked at some of the existing capture products on the market, but couldn't find any optimized for its niche. "Working with our beta customers, we have built rules specifically for capturing data from the types of documents clerks deal with," Painter said. "Now, when we go to a new customer, we are not starting from scratch."

"We also have a fairly simple GUI, as well as VB

scripting that enables our customers to create their own rules. Some vendors require customers send them sample documents each time they want to expand their application. We enable our customers to optimize their systems themselves."

For lower volume customers, SIRE has introduced rubber-band-based OCR techniques. SIRE hasn't done any ROI studies specifically on *Auto Index*, but Bowman said SIRE's current customers have realized significant returns even with manual keying. "For example, 10 years ago, when we started working with **Salt Lake County**, the clerk's office was receiving 1,000 documents per day and had a two-month backlog for data entry," he said. "It is now receiving 3,000 documents per day, has eliminated its backlog, and is processing everything with 20% less staff. This has saved more than \$1 million annually."

"Salt Lake County is one of our beta sites for *Auto Index*, and the module should help its clerk's office continue to increase its volume without increasing staff. In addition, *Auto Index* reduces training time for new staff members. It takes quite a bit of time to teach a new employee where to look for data on a hundred different, non-standard document types. With *Auto Index*, you build rules that will last forever."

For more information:

<http://www.siretechnologies.com>

Kofax, Interwoven Strengthen Ties

In yet another example of capture's immersion into the ECM market, **Interwoven** recently announced a reseller agreement with **Kofax**. The companies had formerly operated under a co-selling agreement dating back to 2003. The new arrangement will enable Interwoven customers to purchase Kofax *Ascent* directly from the ECM vendor.

"Other ECM vendors are probably telling you this as well, but end users increasingly prefer to deal with a single vendor for all their ECM needs," said Jim Petty, director of product marketing for Interwoven's *WorkSite MP* product. "As about 60% of our opportunities now have requirements for front-end scanning and imaging, we felt it was time to establish a closer relationship with Kofax."

The 60% figure is telling. Two-and-a-half years ago, when the co-selling agreement was announced, an Interwoven executive told us "only a small percentage of *WorkSite*'s install base currently does scanning." "Interest in imaging is definitely

increasing,” Petty told *DIR*. “One interesting trend I’ve noticed is that the larger the opportunity, the more likely it is to have an imaging component.”

Interwoven had formerly been required to bring in a Kofax reseller to sell *Ascent* to its customers. Interwoven intends to maintain those reseller relationships. “The resellers are invaluable,” Petty stressed. “They provide specific domain expertise related to imaging that we don’t have; we will continue to use them. Now, however, in some cases, end users will be able to deal directly with Interwoven for their software purchase, while we will leverage the resellers for professional services.”

Petty noted that **Captiva’s** acquisition by **EMC** (which owns Interwoven rival Documentum) did not force Interwoven’s hand with Kofax. “We’ve had a great relationship with Kofax for five years and were on this path anyway,” he said. “We only have one other capture software partner, which is **eCopy**. And, eCopy is primarily installed as a front-end to our *WorkSite Server* application [more of a departmental product, mainly installed in the legal market], while Kofax is typically our front end for *MP* [an enterprise-class solution].”

For more information: <http://www.interwoven.com/products/imaging/index.html>
<http://www.kofax.com/partners/tech/index.asp>

Tech Data Moves Toward Solutions

As the document imaging market moves downstream, super distributor **Tech Data** plans to create pre-packaged hardware and software solutions it can deliver through its enormous breadth of reseller partners. The first step down this road was its decision to offer three software products through its Document Imaging Specialized Business Unit (SBU). Last month, Tech Data announced it would begin carrying products from ISVs **Doculex**, **Questys**, and **iDatix**.

“We spent the past 12 months working with our hardware partners to identify key solutions they thought we should bring on board,” said Wendy Linsky, VP, peripherals, supplies, and accessories product marketing for Tech Data. “Our hope is to eventually leverage this software to create our own-branded bundles of hardware and software targeting SMBs. We’ve offered bundled solutions as special promotions before, but never carried them as part of our standard product portfolio.”

All three ISV product lines can be configured as complete imaging applications. Winter Haven, FL-

based Doculex has carved out a niche for itself in the legal space. Questys, which is headquartered in Mission Viejo, CA, is best known to us as the preferred imaging partner of **Toshiba America Business Solutions**. iDatix, which is based in Clearwater, seems to have developed a niche in mortgage processing.

“Our focus with these products is primarily serving SMBs,” said Linsky. “We selected products that fit that market in both functionality and price. After all, that’s where all the growth is taking place, and SMBs are still not highly penetrated with document imaging technology.”

Linsky said Tech Data’s enormous reach can be a huge advantage for smaller ISVs. “Most ISVs simply do not have enough feet on the street to drive the kind of volume that we can,” she said. “Our organization deals with 100,000 VARs. In addition to providing sales and marketing support to our partners, we offer education programs where VARs and end users can be introduced to imaging products.”

For more information: <http://www.techdata.com>;
<http://www.idatix.com>; <http://www.questys.com>;
<http://www.doculex.com>

TAWPI Launches RFP Portal

TAWPI (the Association for Work Process Improvement) has launched a Web site to bring together end users and document imaging service providers. TAWPIeBidsolutions.org is a portal designed to simplify the RFP process. It enables organizations to post their job specs anonymously and have them looked at, and bid on, by participating service providers.

“When we hold our annual show, most of the exhibitors show up hoping to get some opportunities to bid on RFPs,” said Jason Glass TAWPI’s VP of sales. “And when we hold an educational conference or Webinar on creating RFPs, it’s always full. We put one and one together and came up with this. There is no charge for end users, and we think it reduces the amount of time it takes them to create RFPs by 75%.”

The site generates revenue from the participating service providers. Currently 25 have signed up for listings. Introductory rates are \$1,000 for six months for a national service provider, \$500 for regional, and free for metro listings for a specific city. TAWPI also receives 5% of any fulfilled RFP. To participate, service providers fill out an online form, which is then reviewed by the TAWPI staff.

Similarly, there are online forms for end users who enter the specifications for their projects. Providers can decide which projects they want to bid on and complete another form to submit their bids. "We boil down the content of the submissions so end users can make an apples-to-apples comparison," said Glass, who gave us a demo that had a table with columns listing prices for various types of images. "One of the problems with RFPs is that often you receive bids structured very differently."

"We rank the providers in order of price and quality of service. Quality is determined by a number of factors that go into an algorithm we've developed. These include the number of employees, when the company was established, what types of certifications they've earned, jobs they've completed through our site, and feedback from their customers."

TAWPI eventually hopes to expand the site to include transaction processing jobs and even scanner purchases. "The site could also be attractive for B-to-B transactions, facilitating U.S.-based service providers outsourcing jobs to organizations in other countries," said Glass.

The core software for the site was developed by **BidQuote**, a Houston-based company that focuses on the legal document services space. "They are the technological drivers," said Glass. "Their system is very malleable, which enables us to partner with experts in certain areas and use their input to create questions to generate quality RFPs."

TAWPI's biggest challenge right now is

increasing end-user awareness of the site, which was launched in December. "This is new to them, and they seem somewhat hesitant to try it; quite frankly, most can't believe it's free," said Glass. "We are currently marketing to our membership base as well as hitting some vertically focused trade shows in fields like health care and government."

Former **Captiva** and **Scan-Optics** executive Susan Lucek has been hired by TAWPI to assist with the marketing of TAWPIeBidsolutions.org.

For more information: <http://www.tawpiebidsolutions.org/>

GEE REPLACES WOOD AT HSA

Dave Wood was in our industry, and then he was out; then he was back in again, and now it appears he is out again. The main marketing agent for **Harvey Spencer Associates** (HSA) for the past year or so has exited to take a job developing "cell phone usage technology" for **Qualcomm**. Twenty-five-year capture industry veteran Mike Gee has taken Dave's place. One of Gee's claims to fame is that in the 1980s, he led a team that designed and developed a document management system for the **U.S. State Department's** \$7 billion anti-terrorism embassy remodeling effort.

Gee will be spearheading the marketing efforts for HSA's services around the growing document capture software space. In conjunction with those services, HSA will be presenting its second annual *Document Capture* conference, this Oct. 3-4 at the **Glen Cove Mansion** on Long Island.

For more information: <http://www.hsassoc.com/>; mike.gee@hsassoc.com

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