Document Imaging Report Business Trends on Converting Paper Processes to Electronic Format

4003 Wood Street
Erie, PA 16509
PH (814) 866-2247
http://www.documentimagingreport.com

April 23, 2010

THIS JUST IN!

KNOWLEDGELAKE SET TO MAKE BIG SPLASH AT AIIM

There is certainly a lot of trepidation surrounding this year's AIIM show. After less than overwhelming attendance last year, there is skepticism among vendors as to whether or not the event is a worthwhile marketing investment anymore. However, while we've seen many vendors pull out and reduce their floor space, **KnowledgeLake** is bucking that trend. In fact, for the first time in its relatively brief history, the St. Louis-based ISV, which specializes in image-enabling **Microsoft** SharePoint, has stepped out from Microsoft's shadow and has its own booth at AIIM.

"This year, we decided to make the AIIM show our big event spend," said Bob Bueltmann, an imaging industry veteran who co-founded KnowledgeLake in the early 2000s. "Microsoft is making a big spend around AIIM this year—it's a big sponsor with a big booth and close to 20 breakout sessions. The show is being held close to the release date for *SharePoint 2010*, which adds significantly more ECM capabilities.

"The buzz is that there are going to be a lot of AIIM attendees, who have existing repositories and want to figure out how they can efficiently integrate these repositories with *SharePoint*, or how they can put together a plan to migrate to *SharePoint* as their repository. This is a strong audience for us from a positioning standpoint, especially because of AIIM's history as an imaging show.

"Microsoft will be there establishing itself as the de facto leader in the ECM market. As Microsoft's ECM Partner of the Year and the de facto leader in imaging and capture for

Tangent Introduces Check Tools For Document Capture Vendors

When the Check Clearing for the 21st Century Act, commonly known as Check 21, was passed into law in 2003, it potentially created the opportunity for forms processing vendors to jump into payment processing. After all, Check 21 eliminated the need to out-sort and encode paper checks, before submitting them to banks for clearing. Taking advantage of Check 21 protocols, an A/R department (or payment processing service bureau) can capture check images and data and submit them digitally for clearing—similar to the way images and data are captured from forms and submitted to a workflow and/or line of business system for processing. In an electronic process, after a check's been imaged, it's just like another paper form, isn't it?

Well, sort of. Yes, we've seen some movement of forms processing vendors, like **AnyDoc**, toward A/R and check capture. However, according to Steve Mack, president of ISV **Tangent Systems**, which specializes in payment processing, there have also been two major challenges for forms vendors looking to crossover into payments: The first is formatting check images and data to meet the submission requirements of banks. The second is capturing data from checks.

In 2006, Tangent introduced its *Deposit21*[®] software to help payment processors overcome the first challenge. According to Mack, *Deposit21* can be used to output check images and data in formats accepted by the majority of banks currently accepting Check 21 deposits. Last month, with Version 6.0 of *Deposit21*, Tangent introduced check data capture capabilities.

"The latest version [of Deposit21] is a big leap for us, one we've been preparing for, for a few years," said Mack. "Forms vendors looking to move into payments were having trouble getting data off checks. Particularly, they were having a tough time getting the MICR line correct, which is a very important piece when doing electronic deposits. The vendors weren't shy about letting us know what sort of functionality they needed.

CONTINUED ON PAGE 8

"From a strategic standpoint, we added data extraction

from checks as a way to help us sell more of our electronic check deposit software. What we've ended up with is a much better, more complete product."

A component technology

Mack stressed that *Deposit21* is a not a complete forms processing application. "Tangent is a check processing specialist; there are plenty of good forms capture products already on the market," he said. "*Deposit21* is a plug-in component for vendors doing document capture. We help them capture data off checks and also with clearing checks electronically with banks.

"We basically carry water as a configurable component of someone's intelligent capture workflow. The capture vendor owns the cradle-to-grave process."

Why it makes sense for doc. capture

Mack offered some thoughts on why *Deposit21* is potentially a valuable component for capture vendors. "If you look at the market, it's really hard to find any type of organization not accepting payments," he said. "And many times, the payment doesn't come in with a coupon that can be processed in a traditional remittance processing environment."

Tangent certainly understands remittance processing, having offered products in that market since the mid-1980s. In fact, *Deposit21's* original target market was as a replacement for Tangent's software that manages encoding of paper checks. This software is primarily used in remittance processing environments, but also in applications where checks are received with full-page forms.

"Because of the complex level of data contained on tax forms, tax processing organizations are a natural place for the combination of forms and payment processing," said Mack. "In addition, you have organizations like insurance companies, healthcare providers, and charities accepting donations, that all have large volumes of paper forms. It's amazing, the number of non-electronic payments there are in almost any industry."

Mack explained that an important factor setting the stage for forms vendors to break into payment processing is that with Check 21 regulations, users can leverage the same hardware to capture checks and forms without having to worry about running the checks through a separate device for paper encoding. **"IBML, BancTec, OPEX, Scan-Optics**, and **Kleindienst** all offer great scanners for intermixing checks and pages; they also include MICR readers for capturing magnetic ink on checks," he said. "For lower volume environments, **Burroughs** (formerly Unisys) offers a scanner with page document capture and MICR capabilities for \$2,000."

MICR challenges

Mack recommends using a magnetic MICR reader vs. relying on image-based OCR for capturing data from checks. "Basically, magnetic MICR readers provide greater accuracy,"

Document Imaging Report

Business Trends On Converting Paper Processes To Electronic Format

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.

Vol. 20, No. 8

Editor: Ralph Gammon 4003 Wood Street Erie, PA 16509 PH (814) 866-2247 FX (412) 291-1352 ralph@documentimaging



ralphg@documentimagingreport.com

Managing Editor:

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

DIR is published 24x per year, on the 1st & 3rd Fridays of the month, by: **RMG Enterprises, Inc.** 4003 Wood Street Erie, PA 16509 PH (814) 218-6017 http://www.documentimagingreport.com

Copyright © 2010 by RMG Enterprises, Inc. Federal copyright law prohibits unauthorized reproduction by any means including photocopying or facsimile distribution of this copyrighted newsletter. Such copyright infringement is subject to fines of up to \$25,000. Because subscriptions are our main source of income, newsletter publishers take copyright violations seriously. Some publishers have prosecuted and won enormous settlements for infringement. To encourage you to adhere to this law, we make multiplecopy subscriptions available at a substantially reduced price.

Subscriptions: \$597 (electronic) or \$670 (paper) per year.

Notice: No part of this publication may be reproduced or transmitted by any means, electronic or mechanical, without written permission of RMG Enterprises, Inc., Erie, PA, USA.

he said. "Accuracy is very important for organizations making deposits in a Check 21 environment. That's because, in Check 21 transactions, banks are very careful to put responsibility for mistakes on the depositing entity.

"This means that if your organization submits the wrong MICR information and money is withdrawn

deposits, it's been moved to the organization making

results to the magnetic MICR results captured by the

scanner. "If the results are different, the image is sent

need for manual verification is the result of misreads

by the image-based OCR/ICR, because the magnetic

might come from a home printer or another device

for manual verification," said Mack. "Most of the

ink readers are very accurate. Deposit21 can also use OCR/ICR to read the occasional MICR line that

To ensure that MICR information is captured

OCR/ICR read of MICR lines and compare the

correctly. *Deposit21* can do an image-based

from the wrong account, and the person that account belongs to misses a house payment because a mortgage check bounces due to insufficient funds, and that person sues..., well, your organization could be held responsible. With paper checks, the responsibility for capturing MICR information was on the banks. With electronic

the deposits."

"There are some unique techniques that are typically used in check capture applications, which are not common to forms applications."

workflow.

— Steve Mack, Tangent 21

.NET and C# and there are multiple APIs available for integration," he said. "Its different components can be dropped into various points in a partner's "We have some existing relationships with forms processing vendors that I can't talk about. but I can

say we recently did an integration with EMC's InputAccel, which is being resold by one of our partners, **Information Capture Solutions**,

based in Kentucky, which is installing Version 6.0 in a major state revenue

department."

Mack noted that Deposit21's check capture

functionality can be interwoven into forms capture

applications in multiple ways. "Deposit21 is written in

Addressing the X9.37 standard

After Deposit21 completes its check capture steps, it can be used to format check data and images for submission to whichever bank an organization is using for electronic clearing. "People talk about the X9.37 standard for Check 21 images and data, but every bank has its own variation. Our goal has been to create a modular platform with elements that we can re-use for submissions to multiple banks.

"Right now, 99.9% of Check 21 deposits are going through about 50 banks. We've addressed a lot of them and continue to work towards more. We feel it's our job as a vendor to support the banks our customers use."

By supporting multiple banks, Mack said Deposit21 makes it easier for Tangent's customers to switch banks. "One advantage of electronic check deposit is that choosing a bank no longer has to be tied to geography," he said. "Banking relationships can be more fluid. If a bank offers a better deal, a customer should be able to switch without a big change to their check clearing process."

After Check 21 files are submitted to a bank, *Deposit21* has the ability to receive feedback regarding a check's clearance. "We can pass that feedback onto the capture application, so the user knows the status of their checks," he said.

Check 21 still gaining momentum

Mack acknowledged that adoption of Check 21 has been slower than he originally anticipated, but added that it is finally starting to make headway in smaller to mid-sized banks. "We thought the floodgates would open in 2006," he said. "However,

Document Imaging Report 3

Capturing CAR/LAR

that doesn't use magnetic ink."

In addition to being used for MICR capture, Mack said Deposit21 will typically be invoked by forms processing vendors for its CAR/LAR capabilities, which are used to recognize check amounts. "Most forms vendors don't have their own CAR/LAR integration, so it makes sense for them to license ours," he said. "We offer configurable business rules that enable their applications to compare the CAR/LAR results to amounts on forms associated with checks. There are different confidence levels that can be set, and users can configure up to three keyers to validate a piece of data."

Remote key entry can be enabled through a thick client or an AJAX-based client. "Forms vendors typically don't implement the most sophisticated data entry process for checks," said Mack. "There are some unique techniques, such as displaying the next field in the queue before the keyer is completely finished with their current item, that are typically used in check capture applications, which are not common to forms applications."

while all the large banks support Check 21, a lot of smaller banks, that rely on organizations like **Fiserv** and **Fidelity** to process their checks, have been unable to move forward because their partners haven't."

Version 6.0 of *Deposit21* is available now. "Licensing is a one-time fee that scales based on maximum annual volume of checks processed," said Mack. "If a customer deposits to more than one bank, there is a small fixed fee for each additional bank they license support for."

For more information:

http://www.documentimagingreport.com/index.php?id=1864 http://www.tangent-systems.com/

Cintas Growing Document Imaging Footprint

How did the world's largest uniform rental company become a \$200-plus million document management services provider? That was the question we asked during a recent phone conversation with Robert Hoffman, **Cintas'** national director of sales for document imaging. Headquartered in Mason, OH, near Cincinnati, Cintas is a \$4 billion company that generates more than 80% of its revenue through rentals and sales of uniforms and related products. But, lately, we've been hearing more and more about Cintas related to the document imaging industry.

That's because, in an effort to replicate its model of recurring revenue generated by the uniform business, 10 years ago, Cintas bought its way into the document shredding market. "The logistics of the two businesses are fairly similar," noted Hoffman. "In both cases, you use trucks to pick up materials from your customers' locations. However, in one case, you're laundering it and returning it, and in the other case, you're shredding it."

Hoffman noted that Cintas quickly grew to become the number one provider of shredding services in the United States. "At that point, we were operating solely at the end of the content management lifecycle," he said. "We decided to move the needle toward the front and purchased some paper records storage organizations. To complement that business, about three years ago, we acquired two organizations focused on document imaging services. Since then, we've added document scanning capabilities at seven other sites."

For its fiscal '09, which ended on May 31, Cintas reported document management revenue of \$213

million. Through the first three quarters of 2010, it reported \$182 million in document management revenue—growth of 14%. "Shredding is still clearly the largest piece of that," said Hoffman. "But, document imaging is the fastest growing area. We're enjoying annual double-digit growth in imaging services."

Cintas offers a variety of document imaging services, from scan-on-demand for its physical records customers to straight BPO and back-file conversion. Cintas can either release images into a customer's content management system or host them in its *InfoPort* ASP environment.

In addition to storage and retrieval, *InfoPort* can be used for workflow. "Two of the most popular uses for our hosted services are for accounts payable and human resources processes," said Hoffman. "We link to clients' ERP systems and set up hot keys for convenient viewing."

Cintas develops its own capture technology and relies on integration with customer databases to efficiently index images. It also has U.S.-based keyers and a concentration of imaging subject matter experts in Indianapolis—where Image Technology Corporation, one of its acquisitions, was located.

Hoffman noted that Cintas is currently seeing the most growth in the healthcare and financial services verticals. "The prospect of government stimulus money is driving tremendous activity around EMR," he said. "Of course, there is still a lot of consulting, education, and handholding. We are also seeing increased activity around digitizing residential and commercial loan documents, as financial organizations are looking to streamline their audit processes."

Hoffman concluded that Cintas plans to roll out imaging services to four more facilities by the end of the year. "Cintas has a customer base of more than 700,000 clients that purchase our uniform and safety products and services," he said. "We have been very successful leveraging those relationships into document management business.

" In addition, we are in a great position to generate growth as a pure play for document management services. Unlike many of our competitors, we offer both physical records and imaging services. This enables us to take a consultative approach and offer what's best for our customers, vs. trying to push them in one direction because that's all we offer."

For more information: <u>http://image-technology.net/;</u> <u>http://www.cintas.com/DocumentManagement/</u>

4 Document Imaging Report

IBML Introduces Scanner Reporting Module

IBML's ImageTrac IV scanners are rated at over 150 ppm at 300 dpi and over 350 ppm at 200 dpi. They have duplex capabilities, can capture images in color, and have advanced image processing for creating the highest quality bi-tonal images. They offer options like bar and patch code readers, a MICR reader, and in-line OCR.

Like most scanners on the market today, the capabilities of the ImageTrac far exceed anything remotely possible 10 years ago. In

fact, even though scanner vendors continue to incrementally improve their hardware, today's scanners are probably good enough to effectively address an extremely high percentage of imaging applications. In many cases, I think we are waiting for document imaging software to catch up with the hardware.



Derrick Murphy, president, IBML

Well, IBML apparently got tired

of waiting for ISVs to come up with ways to maximize the productivity of its ImageTracs and recently launched the first in a series of modules it is building to improve the management of scanning applications. *SoftTrac Analytics* is a report generating module, designed to be used with IBML's *SoftTrac* capture platform, which was re-written and opened up last year [*see DIR 4/17/09*].

Analytics can be used to create graphical reports detailing information on batches, errors, scanner utilization, and, operator performance. "You'd be surprised at how little information many operations managers have about the performance of their scanning environments," said Derrick Murphy, president and CEO of Birmingham, AL-based IBML. "They just simply haven't had the information available to get the best out of their machines."

According to Murphy, *SoftTrac*, which can be used to manage scanning environments that include multiple ImageTracs, as well as certified TWAINdriven scanners, has always output scanner performance information to a database. "One of *SoftTrac's* differentiating factors has always been its centralized database," said Murphy. "You could have any number of scanners all reporting to a single database. But, previous to *Analytics*, if someone asked us about using this data to create reports, we've always told them to utilize *Crystal Reports*. "I've worked with *Crystal Reports*, and in my opinion, some changes they've made to it recently have made it a lot harder to work with. We've given *Analytics* the look and feel of our capture client, so if users are working in *SoftTrac*, they should have a good feel for *Analytics*. Also, we know what is important in a scanning environment, so we came up with some of our own reports, instead of making users come up with them on their own."

Some reports included in Analytics:

■ **Batch Stats Summaries:** Tell how many batches a particular device has completed over a given time and how many remain open.

Error Summary: Reports how many double feeds, stoppages, errors, etc.

■ Operator Statistics Summary: Tells how many batches and images each scanner operator is processing.

■ Scanner Utilization Summary: Tells how many documents pass through the auto-feeder, how many jams, how long the scanners were idle, etc.

The reports contain both summary data and graphical representations. "*SoftTrac* has always had the ability to create reports, but the information has historically been delivered in a flat file," said Murphy. "*Analytics* enables users to break down data into groupings, by operators and scanners, and by time periods, like days of the week.

"This type of information can be valuable for improving operations. You might suspect your second shift is better than your first, but *Analytics* provides metrics to really prove it, and then do something about it. It also enables operations people to quantify performance and better analyze issues like why one scanner is capturing documents 15% faster than another."

Analytics can currently be set up to run on a schedule, to produce daily, weekly, or monthly reports. Murphy said event-driven capabilities, like the ability to create a report each time a set number of batches is completed, is on the way.

Increased software focus

Murphy estimated that there are approximately 1,000 implementations of *SoftTrac*, 75% of which are running in multi-scanner environments. *Analytics* will be officially announced at this month's AIIM Expo in Philadelphia. It is currently in beta testing and will be available shortly after AIIM.

As part of its increased focus on software, IBML has hired former **Kofax** product manager Chris Horne. "Over time, we plan to leverage the *Analytics* module to add other value, possibly reporting on areas like data capture and quality control," Murphy said. "As long as information is captured to our database, we can produce a report on it.

"We also have additional *SoftTrac* modules in the works; the roadmap is laid out, but we're keeping it under wraps for now. The bottom line is that we are adding more intelligence to the scanning process and helping our customers get more out of their capital investment."

For more information: http://www.ibml.com/products/softtrac.html

Kodak Partner Connects Scan Station with ERP Apps

BCS Systems' *iConnect* software has always been about making scanning simpler. The Houston-based ISV and systems integrator specializes in creating user-friendly imaging applications for ERP environments. So, taking advantage of the capabilities offered by a networked scanning device like **Kodak's** Scan Station 520EX was a natural.

BCS was recently rewarded for its efforts by being named ISV of the Year for its integration of *iConnect* with the Scan Station. [*The award was presented at the annual Kodak Executive Summit, held this year in San Antonio.*] "We really like the network capabilities of the Scan Station," said Jon Gibson, president and CEO of BCS. "We worked with the Kodak engineering team to extend *iConnect* to the Scan Station through Web services. Basically, we can now drop ship Scan Station units at remote sites and, over our customers' networks, *iConnect* can do an auto-install. Our customers can have their remote sites up and running in less than five minutes."

Being able to automatically configure a remote capture application does not make *iConnect* unique. Rather, it's the capabilities of the *iConnect* capture platform that differentiate it from other network capture applications. Many of these capabilities are designed to create a tighter integration between capture and ECM, on one side, and ERP systems on the other.

"We originally came out of the ERP space," said Gibson. "In the mid-1990s, we launched a document imaging and workflow division to compliment the large scale ERP implementations we were working on in areas like manufacturing, distribution and finance. At the time, I was really struck by the lack of integration between ERP and document management systems.

"So, eight or nine years ago, we launched our first

software product as an integration layer between ERP and DM. Basically, *iConnect* is a middleware that bridges the gap between the worlds of ERP and content. We can reduce document capture to, and retrieval from, ERP systems to a single click."

How iConnect works

Gibson described *iConnect* as a vehicle for creating document "containers" that map meta data from ERP systems into ECM systems. "The idea is to make the process as transparent as possible for the end user," he said. "Users don't have to know where a document is going or being retrieved from. They might only need to enter a couple pieces of information, like a document's type and who it is for. We can pull the rest from the ERP system, line of business app, or other sources."

Combining this type of functionality with Kodak's Scan Station has set up the possibility of single-click capture. "We are in the midst of rolling out a 250 unit deployment of the Scan Station, to more than 105 locations," said Gibson. "Trying to do this with traditional PC-based scanning would involve a significant amount of effort, not only for installation, but also for training users on how to scan and index documents in a traditional manner.

"Because *iConnect* has such tight integration with business applications for meta data mapping, it basically knows the indexing information prior to scanning a document. We can set up the Scan Station so users can capture a document by basically hitting a button that identifies the document type."

Gibson added that *iConnect* can also be implemented in a way in which the Scan Station basically asks a user for a specific document to scan. "A receptionist in a medical office could be working in the billing system, when she comes to the point in a registration process where she needs to capture an image of a patient's driver's license," he said. "Behind the scenes, a message could be sent to the Scan Station, which would then display a screen asking for that patient's driver's license. The receptionist then drops the license in the feeder and the image is automatically captured and indexed."

Gibson estimated that deploying distributed capture through a Scan Station is up to 60% less expensive than deploying it through traditional PCbased scanning. "We've had customers tell us that between the PC, the scanner, software, and costs associated with setup and training, it was costing them \$8,000-\$10,000 per location to set up distributed scanning,' he said. "Based on a deployment of 250 units, we have a price, including *iConnect* components, of about \$3,000 per device." *iConnect* is valuable for a lot of other applications, in addition to distributed scanning. These include capturing to multiple back-end ECM systems, migrating documents and meta data from one application to another, and even changing meta data fields. "Because documents captured with *iConnect* are in a container that we've created, users can work through *iConnect* to change the elements of those containers," said Gibson.

Gibson concluded by telling us that BCS has adopted as its de facto motto a comment made by the CIO of one of its customers. "He said, 'you make document management work the way our people work," Gibson said. "This is especially important in distributed scanning, because most people scanning in the field already have full-time jobs. They can't spend days training on how to scan and retrieve a document."

For more information: <u>http://www.bcssys.com;</u> http://www.documentimagingreport.com/index.php?id=1854; http://tinyurl.com/ScanStation

Microsoft Alliance Pays Off For Global 360

Having its business aligned with several hot trends in the marketplace has helped **Global 360** double its partner-influenced revenue in the past year. A long-time **Microsoft** partner, the Dallas-based ISV has ridden improvements in *Visio*, the growth of *SharePoint*, and a resurgence in the case management market to gain traction with some very powerful partners. Global 360, which was founded as a roll-up of several document imaging and management software companies, now markets itself as a vendor of BPM software, which specializes in automating document-driven processes.

"Our partnership with Microsoft has been central to our positioning and growth in the BPM market," said Deborah Rosen, the chief marketing officer for Global 360. "There are some large global BPM players like **Oracle** and **IBM**. But, we've been able to have success as an independent vendor by focusing on the Microsoft platform. Our unique capabilities in the area of case management help us stand out. A recent **Forrester** report called case management an 'old idea' that is coming back into vogue."

Entitled "Dynamic Case Management," the report, which was published at the end of 2009, states the following in its executive summary: "Interest in case management has climbed higher and higher throughout 2009. Drivers include: 1) an increased need to manage the costs and risks of servicing customer requests — like loans, claims, and benefits; 2) a greater emphasis on automating and tracking inconsistent "incidents" that do not follow a welldefined process; 3) new pressure on government agencies to respond to a higher number of citizen requests; 4) new demands that regulators, auditors, and litigants place on businesses to respond to external regulations; and 5) the increased use of collaboration and social media to support unstructured business processes."

It's nice to be on the right side of trends like that," noted Rosen. "In addition, especially, with the launch of *SharePoint 2010* upcoming, and some of the capabilities it introduces, many companies are looking to leverage their investments in *SharePoint* and make it a more strategic platform. One way to do that is by using it for case management. The latest release of our case management product integrates nicely with *SharePoint*."

Global 360 has been marketing these capabilities to Microsoft's large network of partners and SIs. "The message we are hearing from Microsoft partners is that we are leveraging the tools their customers are using," said Rosen. "One of the companies we've been working with is **Avande**, which is a joint venture between Microsoft and **Accenture**. We've done an implementation with them in the U.K. for managing annual reviews of retirement funds.

"We've also been working with one of the Dallas area's largest Microsoft partners, which is using our technology to manage a securities processing application within *SharePoint*. Basically, a lot of our partners have *SharePoint* know-how and experience, and they want to leverage it to bill more hours. Our technology enables them to build BPM capabilities on top of *SharePoint*, which at the same time benefits their customers, because they can leverage the *SharePoint* implementation they already have vs. bringing in something new."

Taking Visio to the next level

Rosen noted that Global 360 has also introduced simulation and optimization capabilities that can be run in conjunction with the process modeling functionality in *Visio 2010*. "Our technology expands the number of people who can influence processes within an organization," said Rosen. "Historically, that role has been left up to the business analysts. We enable managers, as well as information workers, to better participate in process design.

"The bottom line is that Microsoft has a great solution for process modeling with *Visio* and it's got a great solution for workflow with *SharePoint*. Their capabilities fit the needs of a lot of end users. But for

April 23, 2010

people who want more enterprise-class analytics and process automation, that is where our software comes in. And, more and more, we are relying on SIs, who understand the Microsoft platform, to implement it."

For more information: <u>http://www.global360.com/;</u> <u>http://tinyurl.com/G360Partners</u>

KLAKE-AIIM, FROM PAGE 1

SharePoint, it makes sense for us to promote our brand and establish it with a new set of prospective customers."

According to Bueltmann, **Questex**, the organization which owns the AIIM event, has indicated that the big Microsoft presence could draw an additional 3,000 people to the Pennsylvania Convention Center, where AIIM is being held next Tuesday through Thursday, April 20-22. "If they have an interest in *SharePoint*, those attendees would be right in our sweet spot," said Bueltmann. "However, even if the show attendance is consistent with what we've seen in the past, and it includes a high percentage of VARs and industry insiders, we still think our spend will be justified."

Microsoft's growing market presence

Historically, KnowledgeLake has exhibited in the Microsoft Partner Pavilion. However, after a couple strong years of growth, Bueltmann said he felt it was time his company created some of its own branding in the ECM marketplace. In fact, this year, KnowledgeLake has invited its partners to give presentations in the KnowledgeLake booth. "We want to provide customers with education on how to best leverage our technology and that of our partners, and also let them know what some of our recommended best practices are," said Bueltmann. "We are going to be showing complete solutions developed in conjunction with partners like **ReadSoft**, for invoice processing; **Global 360**, for case management, financial services, and employee onboarding; **Ninetex**, which has strong workflow for mid-size A/P and HR departments; and **ERP-Link**, which has a certified integration with **SAP** for *SharePoint*."

Bueltmann did say that the Microsoft booth will be worth visiting, for what he considers is a very unique demonstration. "Microsoft is offering a hands-on lab, which is nothing I've ever seen traditional ECM vendors try," he said. "That's because their technology has been too hard to use. SharePoint is very easy to configure and use. It's also feature rich. Because of this, SharePoint is becoming ubiquitous. It's not being used in just one department like traditional ECM, it's becoming a tool leveraged across the enterprise.

"SharePoint it really starting to fulfill Microsoft's vision of ECM for the masses. It's not being used just as a file system. Enterprises are taking advantage of *SharePoint's* features to leverage it across multiple applications. It's quickly becoming an ECM platform that everybody is using. As a result, Microsoft has really made some significant market share gains, and I expect it to continue to marginalize more traditional ECM platforms."

For more information: <u>http://www.erp-link.com/</u> <u>http://www.knowledgelake.com/events.asp</u>

Subscription Order Form for RMG Enterprises, Inc.	
4003 Wood Street • Erie, PA 16509 • Phone (814) 218-6017 • e-mail: ralphg@documentimagingreport.com	
Document Imaging Report Business Trends on Converting Paper Processes to Electronic Format	1 year (24 issues) a electronic copy @\$597 b paper copy @\$670 If you are not b you are not
SCAN: The DATA CAPTURE Report Premier Management & Marketing Newsletter of Automatic Data Capture	
NameTitle Company	Please Please
Street	16509)
City State Zip	Charge My Credit Card (Charge will appear as RMG Enterprises.) AmExVisaMCDiscover
Phone () Fax ()	card number expire date
E-Mail	Bill My Organization (Purchase order # optional.)

8 Document Imaging Report

April 23, 2010

Notice: No part of this publication may be reproduced or transmitted by any means, electronic or mechanical, without written permission of RMG Enterprises, Inc., Erie, PA, USA.