

# Document Imaging Report

Business Trends on Converting Paper Processes to Electronic Format

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September 6, 2013

## THIS JUST IN!

### VISIONEER TO BUNDLE CAPTURE SOFTWARE

Scanner vendor **Visioneer** has signed a deal with ISV **Office Gemini** to bundle batch capture software with its higher-end scanners. Visioneer, which is the vendor behind the **Xerox** DocuMate line, will include Office Gemini's Diamond Vision Enterprise Edition with "select production and departmental scanners." The software, which carries a list price of \$1,950, includes features like batch management, bar code recognition and OCR, indexing, reporting, and export to SharePoint and other ECM systems.

"We've been searching for quite awhile for the right product to include with some of our higher-end modules, so we could be more competitive," said John Capurso, CEO of Visioneer. "We had a lot of customers asking for bundled capture software."

Based in Houston, Office Gemini has been in business since 2006. In addition to Diamond Vision, it markets the Dokmee document management line, which is available in both on-premise and online versions.

For more information:  
<http://bit.ly/GeminiVisioneer>

### Kofax posts Q4 growth

**Kofax** recently reported its fiscal fourth quarter and year-end results. The Irvine, CA-based capture ISV completed the year with \$266.3 million in total revenue, a 2.7% increase with currency fluctuations taken into account. For the year, software license sales were down 3.1% in constant currencies, but were up 3.1% in the fourth quarter, which followed a 20% increase in Q3. Also, last month, Kofax announced a \$7.6 million win with a U.S. government agency.

## ABBYY, Lexmark Win "Clean Sweep" in OCR Patent Case

The long-standing battle between **Nuance** and **ABBYY** over OCR patents is seemingly over. Last week, a jury ruled unanimously in favor of ABBYY and its customer **Lexmark**—concluding that neither company infringed on Nuance's OCR patents or its trade dress. Nuance had been seeking \$107 million in damages.

"It was a clean sweep by ABBYY and Lexmark," said an elated LeighAnn Weiland, VP and general counsel for ABBYY USA. "The jury found no infringement on any of Nuance's patent or trade dress claims."

The case was heard in San Francisco in the court of U.S. District Judge Jeffrey White. White presides over the Northern District of California. The hearing took place over two weeks, starting on Monday, Aug. 12. It ended with the eight-member jury rendering its decision on Monday, Aug. 26.

"As the plaintiff, Nuance had the right to request a jury trial," explained Weiland. "Judge White gave each side 17 hours to make its case. He is a no-nonsense person and managed the case very effectively. He utilized a chess clock to measure each side's time down to the second."

"Each side made its closing arguments on Friday. The jury was not allowed to deliberate over the weekend. They came in on Monday at 8 a.m. and by 2:30 p.m. had reached a verdict."

Weiland noted that the jury was given an extensive volume of technical information to read over. "We were required to identify and define any terms that were germane to the patent claims," she said. "Luckily the jury was able to quickly parse through that information."

According to Weiland, although the case first showed up on *DIR*'s radar in 2008 [see *DIR* 5/2/08], initial filings were made by Nuance all the way back in 2002. We first reported that the case involved five patents filed between 1988 and 1992 and granted between 1992 and 2000. Those patents were picked up by Nuance when

(as ScanSoft) it acquired Caere in 2000 [see *DIR* 2/4/00]. A sixth patent, that was filed by ScanSoft in 2000 and granted in 2004, was also added.

The patent case at one time included OCR ISV **I.R.I.S.** and its customer eCopy. They were dismissed after Nuance acquired eCopy in 2009.

When the case came to trial, the suit had been narrowed down to three patents, U.S. numbers 5,381,489; 6,038,342; and 6,742,161. The first two were Caere patents with the title, "Optical character recognition method and apparatus." The third is the ScanSoft patent entitled, "Distributed computing document recognition and processing."

**"What Nuance has patented is analogous to building a bicycle, while we are building jet airplanes."**

**—LeighAnn Weiland, general counsel, ABBYY**

"The patents had been through a reexamination, so arguing that they were invalid was not an option," said Weiland. "Instead, ABBYY's defense was non-infringement. If you look at ABBYY's methods as compared to the very simplified processes in the patents that Nuance is alleging we violated, it's very clear that ABBYY is not infringing. What Nuance has patented is analogous to building a bicycle, while we are building jet airplanes."

ABBYY's trade redress defense focused on the packaging requirements of retail outlets selling OCR software along with Lexmark devices. (In 2001, Lexmark replaced Nuance's bundled OCR software with ABBYY's.) "The packaging that ABBYY used in the 2002-2008 timeframe that Nuance called into question was based on the standard box required by retail partners like **Fry's, Micro Center**, and others," said Weiland. "Nuance was claiming that design was their trade dress. All we had to do was show boxes from a similar timeframe from other ISVs like Microsoft and the jury was quickly disabused of Nuance's argument. All the jury had to do was see the other ISVs' products, and they understood that Nuance did not have protected trade dress."

Weiland noted that Nuance has the right to appeal the jury's decision. "Nuance can't appeal the facts of the case," she said. "However, it can certainly appeal the application of the law to the facts."

Nuance EVP and General Counsel and Secretary Todd DuChene issued the following statement, "We are disappointed in the jury's verdict that ABBYY did not infringe valid U.S. Patent Nos. 6,038,342; 5,381,489; and 6,742,161, and we are reviewing the verdict carefully to determine our next course of action."

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*DIR* is the leading executive report on managing documents for e-business.

Areas we cover include:

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3. Forms Processing/OCR/ICR
4. Enterprise Content Management
5. Records Management
6. Document Output
7. Storage

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It is not clear whether Nuance will be required to pay court costs. "There are certain post-trial motions that are continuing," said Weiland.

Joe Budelli, ABBYY USA's senior VP of sales, noted that the verdict is good news for ABBYY and its customers, as well as the whole capture industry. "Any time this type of action takes place in the market, it creates a certain level of uncertainty," he said. "We are very pleased with the support we got from many in the industry during this process, as well as many of our customers.

"ABBYY's business has continued to grow through the last five years, and we continue to bring out new and innovative products. This case shows that we are a company built to last, and that we will stand behind our technology and customers and are here to serve the market."

Weiland was very complimentary of ABBYY's legal team, which included outside counsel from the firm of **Finnegan Henderson Farabow Garrett & Dunner LLP**. She was also complimentary of Nuance's team, which included outside counsel from **Morrison & Foerster LLP**, the firm which represented **Apple** in its patent suit against **Samsung**. "We were up against the best of Silicon Valley," she said. "It's quite gratifying that our team could work like a little machine to convince a jury of what we believe are the actual facts of the case."

For more information: <http://bit.ly/ABBYYPR>

## New Ownership, New Vision for Kodak DI

**Kodak Document Imaging** (DI) is now part of **Kodak Alaris**. Earlier this week the sale of the \$400 million document scanner, software, and service vendor by **Eastman Kodak Company** to the **U.K. Kodak Pension Plan** (KPP) was officially completed. The sale, which also included Kodak Personalized Imaging (PI), enabled Eastman Kodak to emerge from bankruptcy and gives DI a fresh start as part of an organization managing more than \$1.5 billion in assets. DI and PI are now included in those assets and will go forward as the main pieces of KPP's Alaris holding company.

The name Alaris apparently comes from a Latin word that means "swift, powerful, quick, and willing." "We are very excited about what we are calling the dawn of DI," said Dolores Kruchten, who will maintain her role as president of DI under the new ownership. "This is the first day of a new company—Kodak Alaris. It's a new name, but we have the right

to maintain our Kodak heritage.

"As part of the deal, we have secured rights for perpetual usage of the Kodak name in our branding. But, to not create confusion, we are a completely separate company that is now owned by KPP."

KPP is a private company that serves thousands of Kodak pensioners—a group which includes both former and current Kodak employees. Its headquarters are in London, but Kodak Alaris will maintain its operations base in Rochester. A board, which includes Kruchten and PI President Dennis Olbrich, is being set up to oversee Alaris, but the teams for both DI and PI remain mostly in tact.

"Functions such as tax, audit, treasury, and IT will be shared across DI and PI and managed on a corporate level," said Kruchten. "DI will maintain its own complete team to focus on areas like sales, service, marketing, development, manufacturing, management, finance, and human resources. This will give us the laser focus we need to drive growth and improvement in our business."

Going forward, Kodak DI plans to maintain and/or increase its investments in hardware, software, service, and marketing. "Our supply of products, parts, service, and software will not be interrupted," said Kruchten. "DI has a strong business model, and we want to continue to reinforce to our channel that they are an important part of that, and we will not waver from our strategy. We also will continue to build on our core strength in hardware and services, while expanding more into software.

"One change you'll see under our new ownership is an increased focus on growth. This will be driven by some additional software investment, as well as an increased commitment to production capture. We will also look at how to improve the flexibility of our service to continue to help our customers get the most out of their equipment. Finally, we will increase our marketing investments. We plan on doing a lot to make sure people know the acquisition is complete and that we have a new name, as well as a strong offering of products and service."

### **Software leads in new directions**

Tony Barbeau, who is the GM of DI's products and service business, discussed some specifics of DI's software growth strategy. "Historically, our software has been mainly batch capture applications that run with our scanners," he said. "This includes products like Smart Touch, which is utilized primarily with our distributed models, and Capture Pro.

"Late last year, we introduced Info Activate, which is a browser-based, thin-client way for capturing information—not just images from scanners but from a variety of electronic documents—and moving it into SharePoint. Extending beyond that, in May of this year, we introduced Info Insight. This is a platform that provides a broad range of benefits. It is able to capture information coming from non-image sources, such as electronic documents, e-mails, text messages, Tweets, and Facebook pages, along with information from scanned documents. Info Insight can then be used to intelligently recognize, classify, and process that information, and even respond to customer inquiries.



**"We have spent the past 20 years focusing on capturing information on documents. But today everyone is buzzing about information coming in through sources like e-mail, social media, and voice."**

**—Dolores Kruchten, Kodak Alaris**

"We have really laid the foundation for our software business. And while we will continue to make investments in hardware, in both production and distributed scanners, we also plan to invest more in software. This will include expanding our technology in areas like mobile and the cloud. It will also include focusing on input as well as enhancing communications technology for providing response to that input."

Barbeau added that Kodak has some unique advantages around technologies and patents involving imaging paper documents. "While we will continue to take advantage of that," he said, "it's also important that we expand into some other areas of information capture and management."

Kruchten built on this sentiment. "We have spent the past 20 years focusing on capturing information on documents," she said. "But today everyone is buzzing about information coming in through sources like e-mail, social media, and voice. Businesses are looking at how they can manage this full flow of information. They really need to make sure all these sources come together."

"That is our focus: How do we capture information that is critical to business applications so that our customers have it at the right place and the right time? And while capturing paper is still core and a critical part of our business, we envision ourselves as making sure our customers can capture all their incoming information. We are looking at innovations we can implement that will enable them to do that effectively."

In fact, later this month Kodak will be holding its second annual Global Directions conference, with the theme of "Intelligent Information Management." The keynote speakers come from far outside the realm of traditional document capture. They include noted technology inventor, visionary, and author Ray Kurzweil, who is now a director of engineering

at **Google**. Top executives from **IBM**, **Microsoft**, and **Salesforce.com** will also keynote, presenting on topics like big data analytics, search, and the death of the desktop.

The event will run Sept. 22-25 at the **Gaylord National Resort** in Washington, D.C. "Global Directions will be a combination of an educational conference, as

well as a kick-off for the new Kodak DI," said Kruchten.

### **Projecting growth for 2013**

According to Kruchten, DI and PI, the businesses that now make up Kodak Alaris, accounted for \$1.2 billion revenue in 2012. We noted that this was down from an originally reported number of \$1.4 billion. "When we went through the fine tuning for the deal, in the end it did not include everything we originally thought it would," Kruchten explained. "The \$1.3 billion figure in our press release represents expected revenue by Alaris for 2013. This includes projected growth for both DI and PI."

The press release also listed Alaris as employing 4,700 people.

Alaris has set up 32 legal entities worldwide. "This includes manufacturing facilities around the globe," Kruchten said. "In the U.S. we have manufacturing in both Rochester and Colorado. We also have manufacturing in the U.K., Brazil, China, India, and Russia. Overall, our largest employee base is in the U.S., with the majority of our R&D being done in Rochester."

Although Kruchten noted that Kodak Alaris will continue to coordinate its fiscal year with the calendar year, she was uncertain how much visibility will be granted into DI-specific numbers. "While we will share some information, as it's important to talk about our performance and success, I don't have details of how or when that will be shared," she said. "I do not imagine it will be on a quarterly basis, as you see with most publicly traded companies."

Kruchten added that not being public enables Alaris to take a longer term view toward success. "We will not have short-term pressure from Wall Street to meet quarterly numbers," she said.

Kruchten concluded that this week was also a big one for Eastman Kodak Company, which emerged from bankruptcy after more than a year-and-a-half. "One thing Kodak has done is open up its branding for other companies like us to license," she said. "So, you will actually still find Document Imaging listed on the Kodak Web site."

For more information:

<http://graphics.kodak.com/DocImaging/US/en/index.htm>;  
<http://www.documentimagingreport.com/index.php?id=2462>  
<http://www.globaldirections2013.com/>

## DocuWare Expands Footprint with Westbrook Acquisition

In recent years **DocuWare** has made no secret about its goal of aggressively pursuing growth. Last year, in fact, the Germany-based document imaging and management ISV took on funding from **Morgan Stanley Expansion Capital** expressly because of the investor's experience working with high-growth companies [see *DIR* 5/4/12]. Earlier this week, DocuWare utilized some of its capital to accelerate its growth through the acquisition of competitor **Westbrook Technologies**.

A long-time player in our market, Westbrook's crown jewel was its relationship with **Ricoh**, which dates back to a nationwide partnership that Westbrook formed with IKON in 2002 [see *DIR* 11/15/02]. Ricoh, of course, bought IKON in 2008. Westbrook has maintained its Premier Partner status with Ricoh, while DocuWare, whose U.S. business model is focused on selling through the MFP channel, was a bit lower on the Ricoh food chain.

The said, overall, we're estimating that DocuWare, whose worldwide revenue surpassed the \$20 million mark in 2010, was at least twice the size of Westbrook. "Part of our growth strategy has been to consolidate the market," said Thomas Schneck co-president of DocuWare. "There are a lot of good companies out there, and Westbrook is certainly one of them. It has a very similar business model to ours and the same market focus. The acquisition was really a natural extension what we are doing."

Indeed, Westbrook and DocuWare have fairly similar product lines. Both have legacy client/server products that in recent years have been

complemented by Web-based technology. DocuWare introduced a browser-based client in 2008 and last year debuted DocuWare Online, a SaaS-based version of its technology.

Westbrook's flagship software Fortis also offers a browser-interface option. In 2009, the Branford, CT-based ISV introduced FortisBlue, a completely Web-based version of its software that it has continued to build up over the past few years [see *DIR* 7/22/11].



**Thomas Schneck,**  
president,  
DocuWare

"Westbrook certainly has a lot of good and interesting functionality in its products," said Schneck. "Right now, we are taking some time to understand their strengths. For the foreseeable future, we don't plan on making any changes on the product side. For next year, we'd like to build a common

platform between DocuWare and Fortis and FortisBlue, then look over time how we can bring all the products together.

"For now, we plan no changes in how Westbrook is doing business. The company and product names will remain, and Westbrook will operate as a wholly owned subsidiary of DocuWare. [Westbrook CEO] Einar Haukeland has resigned, but the rest of Westbrook's VPs and directors remain, and they will now report to their counterparts on the DocuWare side.

"Westbrook is very good at what it does, and we do not want to interrupt that. We want to take our time and really understand the best way to move forward. We are taking a mid- and long-term approach and have no immediate changes planned."

According to Schneck, Westbrook has 1,400-1,500 customers, 50 employees, and 40 value-added reseller partners. "Westbrook's Ricoh relationship was very attractive," he noted. "But, Westbrook also has an interesting VAR channel. In the U.S., DocuWare has focused mainly on selling through the MFP channel. This acquisition should help bring our U.S. channel more in balance with our European channel, which has a higher percentage of VARs."

Schneck noted that when DocuWare first began marketing its software in the U.S., Westbrook was acknowledged as one of the market leaders. The company has struggled a bit since the mid-2000s when it made a large investment in an SOA strategy that didn't work out. That failing led to a change in CEOs, which ended with Haukeland taking over in

2008. More recently, Westbrook struggled to find a VP of Sales before hiring Chris Pease this summer.

The acquisition by DocuWare should bring some stability, leadership, and vision to an organization with an impressive history, a large install base, and by and large a reputation for solid software products. On DocuWare's part, it has proven true to its word of aggressively pursuing growth in the document management space targeting the mid-market. This acquisition clearly expands its footprint and shows that DocuWare intends to be in this market for the long haul.

For more information: <http://www.docuware.com/>;  
<http://www.westbrooktech.com>

## A Closer Look at Xerox's JBIG2 Headache

By now many of you are probably familiar with the problems Xerox was having with character substitution errors when scanning documents on some of its MFP units. The story broke early last month and stayed in the news for weeks as Xerox came up with explanations and then software patches to rectify the problem. In the end, Xerox decided to release patches designed to remove the pattern matching its JBIG2 technology was using to compress documents when certain Xerox MFPs settings were adjusted to produce more aggressively compressed PDF images.

For the most part, we tried to ignore the story, as it seemed to realistically affect a very small number of documents and users. After all, according to Ammar Degani, manager, integrated platform strategy and planning for Xerox's Office and Solutions Business Group, Xerox first introduced JBIG2 compression into its hardware in the 2005-2006 timeframe. "Only recently has character substitution really become an issue and received a lot of publicity," Degani told *DIR*.

"One reason we think the issue did not come up very often previously was that it does not occur with most documents," Degani continued. "If you take a typical document with 10- or 12-point font, no character substitution is likely to happen. It happens when you are dealing with what we call 'stress' documents. This means they have smaller font sizes and/or background noise that creates stray pixels. These are not typical scenarios."

In addition, the substitution errors do not apparently show up when default scan settings are being utilized on the Xerox MFPs. Only when more aggressive compression is manually turned on do

the errors occur. It's *DIR*'s opinion that users scanning 'stress' documents would have enough sense not to apply aggressive compression. And, in the real world, this seems to have been the case. It took a computer scientist, who for some reason was capturing floor plans with measurements listed on them in a very small font, to discover that character substitution errors were being made.

The story generated quite a bit of publicity—with one writer comparing a "document-altering scanner" to "flesh-eating bacteria." And Xerox reacted in what was probably the safest way. "After a lot of deliberation, we decided that the best approach that would minimally impact our scanning was to remove the specific method within JBIG2 which does pattern matching," said Degani. "We felt this would enable us to avoid the problem altogether."

But at what cost? Seeking an answer to this question, *DIR* contacted Ari Gross, founder and CEO of **CVision Technologies**, an ISV which specializes in creating highly compressed PDF files by utilizing JBIG2 technology. We basically asked Gross if turning off pattern matching wasn't in fact rendering JBIG2 useless.

"Basically, you are turning off 85% of the benefit," he responded. "However, it's still better than Group 4 compression (which JBIG2 was designed to replace). Instead of a 5-to-1 reduction in file size, you might get a 20-30% reduction."

We should probably take a minute here to do describe generally what JBIG2 does and how it's typically applied. The standard for JBIG2 was originally published in 2000. It describes a bi-tonal compression technique that is typically applied to imaged text. The JBIG2 technique basically converts text to symbols to reduce storage space and attempts to match similar characters of the same font to the same symbol.

According to Gross, CVision employs the concept of "perceptually lossless" (meaning characters look the same to the human eye) to ensure that dissimilar characters are not assigned to the same symbol. "Font learning is a very precise thing," he said. "Our technology has to be absolutely sure two things are perceptually lossless before making a substitution. If it recognizes a difference, a substitution won't be made."

"There is a science behind the technology, but Xerox is not practicing it correctly. I think it's important to stress that the problem is not in the compression standard, but in the way it's being applied by Xerox. Our technology has been used to compress hundreds of millions of files, and we never

receive complaints about erroneous character substitution.”

Before JBIG2 is applied, scanned images often go through some sort of image processing. If it's a color or grayscale image that includes some graphic information, a technique called MRC (mixed raster content) can be applied. This involves separating an image into layers and then compressing each layer with the optimum technology. A graphic layer would typically be compressed utilizing JPEG, while a text layer could have JBIG2 or Group 4 applied.

“If you are going to turn off pattern matching, why don't you turn off MRC, because MRC is dangerous too?” asked Gross. “And what about JPEG? If your JPEG settings are at the wrong levels, you run the risk of not being able to read a thing on an image. There are probably about 20 or 30 steps that everyone in the compression business is very familiar with. If you don't know what you are doing, compression is always going to be a little dangerous.

“Basically, I think Xerox is being a little inconsistent by throwing out the font matching part of JBIG2. JBIG2 is a standard that took years to develop and if it's implemented correctly, there shouldn't be any problems with it.”

In Xerox's defense, it seems to be ahead of most other MFP vendors in the fact that it implemented JBIG2 at all. **Ricoh** is the only competitor on whose devices we could find any literature discussing JBIG2 compression. (Ricoh says its MFPs do not incorporate the “Lossy Mode [within JBIG2]” and, as a result, are not experiencing issues with substitution errors.)

In a white paper entitled “Scanning and Compression” that was released in response to its JBIG2 crisis, Xerox shows that even with font matching removed, it is still achieving better compression rates than “Tier 1 competitors”—especially on file types where MRC is typically utilized. “Aside from pattern matching, we have not removed any of our compression options,” stressed Degani. “If you look at the compression rates we are getting before and after installing the patch that removes the pattern matching, you'll see that in documents where you have both photographic and textual data [where MRC is typically applied], there is a minimal difference. Where you see the most significant difference [after the patch is applied] is in files that are primarily text-based with a clean background. But, we also recognize that these types of files are typically not as large to begin with.”

When we asked if Xerox would consider re-introducing pattern matching in the future Degani replied, “At this point we have no plans to bring it

back. However, standards are always evolving and depending on what happens in the future, we may at some point consider it.”

Of course, this gets back to Gross' contention that it's not a problem with the standard—it's really a problem with how Xerox is implementing it. “The standard is not going away,” Gross said. “I think some vendors should be a little more open to utilizing third-party technology.”

For more information:

<http://www.office.xerox.com/scanning-software-patch/enus.html>;

<http://www.cvisiontech.com/resources/jbig2-compression-primer/index.php>

## IOFM Launches Summit for Payments Professionals

The **Institute of Finance and Management** (IOFM) will be holding its first Payments Summit next month in Las Vegas. The accounts receivable (A/R)-focused event is being held at the Paris Hotel Sept. 25-27 and will bring together more than 100 professionals in the payments processing industry. The two-day conference will feature a combination of panel discussions, case study presentations, networking, and more.

“Between government entities, utilities, credit card companies, lenders, insurance companies, healthcare providers, and publishers, there are more than 50,000 billers in the United States, and each is processing a minimum of 5,000 remittance bills or other type of mailed payment per month,” said RD Whitney, executive director of IOFM. “We view this as a very underserved community and thought there would be immense value in bringing together professionals in this market. We are following the simple equation of putting solutions buyers and providers in a face-to-face situation.”

IOFM should not be confused with the Institute of Financial Operations (IFO), which a few years back bought the trade association TAWPI (which had formerly served the payment processing market). The Payments Summit is somewhat of a reboot of a former annual TAWPI event, and IOFM has even brought in former TAWPI activist Mark Brousseau to chair its new event. That said, IOFM certainly has a strong legacy of its own.

IOFM was officially launched by IOMA (The Institute of Management and Administration) in 2011 and earlier this year was acquired by **Diversified Business Communications**, an international publisher and events producer. “IOFM focuses on professionals in the area of financial management,” Whitney told *DIR*. “We market our

service to controllers and individuals in accounts payables and receivables.

“We have thousands of members, and we offer publications, certifications, tools, and events designed to keep them in compliance, save time, do their jobs better, and advance their careers.”

IOFM’s flagship event is its annual **A/P Conference and Expo**, which predates IOMA’s launching IOFM. This year, the 12<sup>th</sup> annual A/P event will be held at the Planet Hollywood in Las Vegas, Oct. 21-24. More than 600 A/P professionals are expected to attend. “It’s the largest dedicated A/P event held in America,” said Whitney. (Several document imaging ISV are currently listed as sponsors.)

The A/P event is being used as model for the new payments conference. “The goal of this year’s Payments Summit is to create a platform for a 2014 Payments Conference and Expo that is being planned for June on the inner harbor in Baltimore,” said Whitney. “For this year’s Summit, we are expecting around 150 professionals. We expect solution providers and practitioners to come together to learn and to share best practices with each other. We then want them to continue to grow with us as the event gets larger.”

Scheduled speakers at the Payments Summit include representatives from big name end users like **Verizon, CenturyLink, New York Life, Zion’s Bank, Citibank, JP Morgan Chase, BNY Mellon, PNC, US Bank, Fifth Third Bank, and Berkheimer**. “We’re not going to have a bunch of solution providers get up on stage and pitch their products,” said Whitney. “Instead, they have brought

in their clients in to discuss implementations. These clients bring best practices insights from the trenches. The presentations are really about sharing information for the greater good.”

Brousseau noted that many in the payments industry are desperately in need of such information. “In some respects, the TAWPI payments event went away at the worst possible time,” he told *DIR*. “We’ve really reached an inflexion point where electronic payments are becoming the majority, but many operations professionals struggle with how to integrate their systems for managing checks, cards, and other payment formats. They end up with a bunch of siloed systems. IOFM should help them address this challenge.”

Current Payment Summit sponsors include **IBML, eGistics, and Fairfax Imaging**. Some titles of committed attendees include Finance Manager, Treasury Management Operations Manager, Director of Gift Processing, Managing Director, Receivables; Senior Manager, Procure-to-Pay Operations; VP of Operations, SVP, Integrated Receivables; Director of Financial Systems, and VP, Treasury Services.

*DIR* Editor Ralph Gammon is planning on attending. If you are interested in joining him at the Payments Summit, you can receive a 50% discount on your registration fee by entering the code “DIR” on the registration page.

For more information and registration:  
[http://www.iofmpaymentssummit.com/;](http://www.iofmpaymentssummit.com/)  
<http://www.iofm.com/event/apconf-fall13>

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