# **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

February 7, 2020

## THIS JUST IN

## HSA CAPTURE 2020 MOVES TO CHICAGO VENUE

As some of you may have seen, after 15 years in the same location at the Glen Cove Mansion on Long Island, **Harvey Spencer Associates'** annual Capture Conference will be moving to a new location. Scheduled for Sept. 9-10, Capture 2020 will be held at the Eaglewood Resort and Spa outside of Chicago. It will be the first conference by HSA since it was acquired by the international analyst firm **Infosource** last December.

Harvey Spencer, principal at HSA, noted that since the acquisition, the firm has been looking at all aspects of how it runs its business, including the conference. "A number of our attendees have been suggesting that we move the conference around some, but we had been resisting this," he told *D*/*R*. "The Glen Cove location was both good and bad-on one hand, people could leverage New York's transportation system and the Mansion is sufficiently far from the distractions of Manhattan that it encourages on-site networking. On the other hand, getting to and from the location was regarded as problematic."

HSA events director Erin Dempsey was tasked with finding the new location. "We wanted to make the conference more accessible to folks on the west coast without making travel harder for European and attendees from other parts of the world, so Chicago was a good choice," Dempsey said. "The Eaglewood Resort was renovated in 2016 and offers a lot of nice amenities that will make for a good conference experience. It's also just 12

# ScaleHub Explores New Frontiers of Capture

The document capture industry is evolving rapidly. A few years ago, **Harvey Spencer Associates** first defined where the market is heading as "Capture 2.0," which includes characteristics like multiple types of input, utilization of cloud services, and the

application of intelligence for better understanding of content. **ScaleHub**, a German-based capture outsourcing specialist that has a U.S. office in San Francisco, seems to be fully embracing these concepts. Already, known for its use of crowdsourcing to drive Al-based document capture, ScaleHub is expanding its service to include capture for computer vision applications.



Torsten Malchow, Chief Revenue Officer, ScaleHub

"We have taken our company into a new dimension by expanding our interpretation of capture and what we bring to the market," explained Dan Dubiner, CTO of ScaleHub. "For many years, capture has been considered something that is related to operational data. You use capture software or a service bureau to extract information from documents. But, what happens if you need data related to computer vision?

"We have already seen some BPOs transition into capture that serves other needs. In particular, we've seen them take on training for AI applications. We have a set of services that allows us to create 2D bounding boxes, polygons, semantic segmentations, and everything else that users needed to train computer vision and NLP type technologies."

## Scaling the capture business

Since 2016, ScaleHub has been honing its crowdsourcing capabilities in the document capture space. It has enterprise customers like

## **CONTINUED ON PAGE 8**

### School and Student Services by Community Brands,

for which it processes millions of tax documents each year. "We will be able to take all the experience we have with enterprises, in terms of customer service and scalability, and transition it into a new world," explained Torsten Malchow, an experienced capture sales executive who recently joined ScaleHub as its first Chief Revenue Officer.

Malchow is the brother of Olaf Malchow, founder and CEO of ScaleHub. Previously, Olaf founded foxray, an enterprise-class capture software ISV that focused on the BPO space. Torsten served as foxray's Chief Sales Officer, prior to its being acquired by ReadSoft in 2012. Torsten then spent four years at ReadSoft, before it was acquired by Lexmark, which later acquired **Kofax**, where he spent just over a year. Torsten then worked as **ABBYY's** head of global enterprise sales until the end of 2019.

"After my departure from ABBYY, one of the first calls I made was to my old colleagues from foxray," said Torsten Malchow (Ralf Göbel, the COO at ScaleHub, also spent more than 10 years at foxray). "ScaleHub obviously has sold some projects, but there wasn't anyone focused just on doing sales. I recognized that ScaleHub's solutions were ready to go to market and that the only missing piece was sales power and visibility. We decided it made sense for me to join to develop and execute a global sales strategy in targeted industries and regions."

Those regions are North America and Europe, with the ability to leverage relationships into global deals. Even since his days at foxray, BPOs and shared services centers have been on Malchow's primary list of customers and that should continue at ScaleHub. School and Student Services, for example, utilizes ScaleHub to process tax documents that parents submit when applying for aid at private schools. Peak volumes can reach hundreds of thousands of documents per day during the school application season, and ScaleHub can turn around data from submitted tax documents in 24-48 hours—a significant improvement over what SSS was getting previously.

ScaleHub utilizes a combination of intelligent document capture software for automated extraction and secure crowdsourcing for verification and exceptions to drive high accuracy and fast turnaround times. "It's our combination of artificial and human intelligence that differentiates us from traditional capture vendors," said Malchow. "I have worked at so many of these vendors over the years that I know the limitations of their products, especially in the current market.

"Buying behavior has changed dramatically during the past few years. Previously, most capture projects were decided upon by IT. Now, decisions are more or less

## **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. OCR/ICR, AI and Machine Learning
- 3. RPA
- 4. ECM
- 5. Records Management
- 6. Document Output
- 7. BPM

*DIR* brings you the inside story behind the deals and decisions that affect your business.

#### Vol. 30, No. 2



Editor: Ralph Gammon 4003 Wood Street Erie, PA 16509 PH (814) 866-2247 ralphg@documentimagingreport.com

**DIR** is published approximately 15 times per year, by:

RMG Enterprises, Inc. 4003 Wood Street Erie, PA 16509 PH (814) 218-6017 http://www.documentimagingreport.com

**Copyright** © 2020 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.

being made by business users who have no clue about data entry and are not interested in doing it. If you work with any of the leading capture ISVs, if their software is good, it will deliver about 80% extraction rates and then the customer has to do something with the images to get the rest of the data."

Malchow also views ScaleHub's subscription-based licensing as an advantage. "Almost 80-90% of customers I talk to are asking for pay-per-use models and are not interested in buying perpetual software licenses," he said.

ScaleHub continues to increase its certifications around security, recently achieving a level of HIPAA compliance as well as ISO/IEC 27001:2013 certification for data security. It has also developed a pair of vertical solutions, currently being marketed primarily in Europe. One is for documentation used by pharmacies and the other is for bills of lading related to the transportation industry.

### Making mTurk work

What separates ScaleHub from many traditional BPOs is its use of **Amazon's** Mechanical Turk (mTurk) service for crowdsourcing. This concept was pioneered by Dubiner when he founded FasterAP in 2013 and the technology has been merged into ScaleHub. "Depending on what the customers want, we have other options we can use," said Dubiner. "But, we are very happy with mTurk, we are committed to it, and we are one of Amazon's largest partners for mTurk." (ScaleHub does not currently utilize Amazon Textract for data extraction.)

mTurk provides ScaleHub with virtually unlimited scalability. "Dan's team has done an incredible job creating secure packages that are sent to the crowd, and we have great visibility into how long it takes to get data sets back," said Malchow. "They all weren't working in parallel, but one day recently we had 12,000 people working for us."

Dubiner views scalability as a huge advantage for ScaleHub as it expands its business into the capture for computer vision market. "Our differentiator is that we are able to manage mTurk effectively," he told *D/R*. "Some people say it's impossible to get quality computer vision data through mTurk, but we say it is and are very happy to offer it. Through mTurk, we feel we can offer anything related to capture, when a human look is required." Malchow added that it is how ScaleHub utilizes mTurk that makes it effective. "ScaleHub has been able to consistently meet its SLAs," he said. "If you read articles and blogs on mTurk, people will often say it produces poor quality. That has nothing to do with the platform. It's how it's being leveraged and how the work is being published and tracked that determines the quality."

## A huge opportunity

Malchow noted that he recently read that graphics processor specialist **Nvidia** is currently employing 1,500 people dedicated to computer vision training. "The data scientists at computer vision companies have high salaries, so they are not going to be responsible for data labeling," he said. "And you need high-quality and accurate data to enable tasks like a car driving on its own. A one percent error rate is not acceptable due to the risks involved. Drones also require high-quality data sets to be able to navigate effectively. We are also looking at smart city initiatives. Being able to put a data labeling application out to the crowd represents a huge opportunity for future arowth."

Dubiner noted that a **Scale AI**, a San Francisco-based company that offers to help build AI systems by using "a combination of machine learning and human insight to label and annotate" data, recently received a \$100 million Series C round of funding that values the company at more than \$1 billion. Perhaps we should start calling Capture 2.0, Capture<sup>2</sup> due to some of the exponential valuations it is leading to.

"We are not abandoning the document capture market," stressed Dubiner. "We are just extending the spectrum of what we are covering. Closer to documents, we can also utilize our platform to extend into areas like NLP for transcribing classification data."

"I think companies like ScaleHub will help change the market," concluded Malchow.

For more information: https://www.scalehub.com/about-us/

## INNOVATIVE DOCUMENT ACCUSOFT MANAGEMENT INTEGRATIONS

Discover content processing, conversion, and automation solutions.

#### Document Imaging Report 3

## QAI Preps Fed Agencies for M-19-21 Compliance

For several years now, the U.S. government has been working to transition toward a greater amount of electronic record keeping. This past June, the **U.S. Office of Management and Budget** (OMB) and the **National Archives and Records Administration** (NARA) jointly issued a memorandum designed to regulate that U.S. Federal records "are created, retained and managed in electronic formats" by the end of 2022. That memorandum is known as OMB M-19-21.

"NARA has historically served as a fee-forservice records center for agencies within the Federal government," explained Scott Swidersky, VP of ECM at Konica Minolta **Business Solutions** and president of **Quality** Associates, Inc. (QAI) and DocPoint **Solutions**, two Konica Minolta companies with strong federal practices. "At the very highest level, the federal government is trying to get these agencies to ultimately become paperless. As part of this effort, NARA is saving that after 2022, they are not going to serve as the government's archive in the way these agencies are used to. At that point, NARA will no longer store paper for them and only accept electronic content."

As a document imaging and ECM focused service bureau and systems integrator, QAI has plenty of experience helping government agencies make a transition to electronic documents. To help guide its customer base through this latest initiative, QAI recently hosted an educational seminar in Washington, D.C., that was attended by more than 300 representatives from more than a hundred government agencies. It featured speakers from NARA and some other government agencies, as well as John Mancini, the former president of AIIM, who recently founded a consulting company named **Content Results**.

"We are developing an approach called a 'NARA Readiness Compliance Program,' said Swidersky. "Along with that we are building a 'Readiness Center' that is designed to be an entire consultative self-assessment plan that takes an agency through a course of trying to determine whether or not they will comply with the new records regulations."

NARA itself issues an annual records management self-assessment survey for

government agencies. The survey includes questions about personnel, practices, programs, training and other resources dedicated to records management. "According to data from NARA, 57% of government agencies currently do not have a clearly defined strategy to move their permanent records created in a hard copy format to a digital format," said Swidersky. "So



far, what we've seen is that some agencies are working toward it, but it's been a voluntary, unfunded initiative.

"We were blown away by the number of attendees at our event. Attendees were there primarily to get answers to two questions: what they need to do and how they should go about doing it."

VP of ECM at Konica Minolta Business Solutions, president, QAI and DocPoint Solutions

Solutions Swidersky sees three main areas of opportunities for QAI and DocPoint related to M-19-21:

**consulting:** "There is a need to hold the hands of these agencies along the path of going through an assessment to determine how they will or won't comply."

■ gap-filling: "After that assessment, they need to determine what needs to be done to get closer to fulfilling their requirements for compliance with NARA's changes."

■ conversion projects: "We see a lot of opportunities for conversion projects coming out of this, and QAI has a long outstanding history of doing conversion work not only to reduce the amount of space agencies are using for storage and to improve access to documents—but also along the lines of complying with the goals of M-19-21, which is ultimately to try and create a digital government."

Swidersky summed up what he views as the goal of the NARA initiative. "The idea is to reduce the burden of paper that agencies have been producing and to make all those documents electronic," he said. "Agencies need to come up with a plan to stop printing documents and start submitting them to NARA electronically. This means they could either be scanned or created as first-generation electronic documents.

"Because we've been around the industry and performing the types of services we have been, to us it's like second nature. But, if you are not doing scanning and document management all the time, and given the scale of some of these agencies and the number of locations and employees they have, as well as the strict procedures they need to follow regarding distinctions like permanent and non-permanent records, there are a lot of moving parts there to manage on your own."

## A Look at FADGI

One of those moving parts could be the quality of images being submitted to NARA. At September's **Harvey Spencer Associates** Capture Conference, Markus Most, a senior records analyst at NARA, discussed the challenges that NARA is facing as the federal government moves toward increased digital record keeping. "Part of our job is to provide guidelines to government agencies on how to maintain records and how long to hold them," Most said. "One thing we do is help agencies determine what is a temporary, and what is a permanent, record. Three to five percent of nuclear records, for example, need to be held for the life the republic.

"In addition, we offer a service to agencies similar to what Iron Mountain does. We have 50 facilities storing 30 million cubic feet of paper, including all the presidential libraries from Herbert Hoover on. The challenge is that people now want digital access to this information, and we have to come up with a strategy for providing that."

Along these lines, NARA has been participating in the Federal Agencies Digital Guidelines Initiative (FADGI), which was launched in 2007 and last issued updated guidelines in 2016. FADGI is designed "to articulate common sustainable practices and guidelines for digitized and born digital historical, archival and cultural content." "FADGI is a set of technical guidelines designed primarily for digital cultural and heritage materials," said Most. "It's the first time there have been concrete, measurable targets that agencies can hit. It includes not just quality management, although that is a big part of it, but business process measurables as well."

FADGI incorporates a star system to rate image quality:

■ A one-star rating "should only be considered informational, in that images are not of a sufficient quality to be useful for OCR."

Two-star images "may or may not be suitable for OCR."

Three-star images are defined as "a very good professional image capable of serving for almost all uses."

■ Four star images "represent the state of the art in image capture and are suitable for almost any use."

"NARA is responsible for coming up with guidelines for the storage of permanent records, and we are using FADGI as a guideline," Most said. "We need feedback, for example, on whether vendors in the capture industry can meet the FADGI three-star guidelines."

Swidersky's opinion is that FADGI represents white space for scanner vendors. "Most scanners do not produce FADGI compliant content," he said. "Some do, but they are fairly limited and I am aware of some vendors attempting to move closer to satisfying the requirements. The bottom line is that the scanner industry may need to change to help government agencies comply with their digital conversion requirements."

Swidersky said he has seen some federal contracts that include FADGI compliance and that he expects this requirement to increase in the future.

## **Continuing education**

Swidersky is excited about the opportunities that M-19-21 could create for QAI and its partners. "The initiative has already created a groundswell of excitement in the industry around helping federal agencies become compliant," he said. "We want to become the go-to resource for this. We've gone to Konica Minolta with it, and they are delighted to invest in it. We are currently planning a 2020 live educational seminar series on NARA compliance and readiness. New information is coming out and requirements are changing literally on weekly basis. We are also looking to get partners involved, including many ISVs and hardware vendors that we have worked with for years, as well as some new partners who are ahead of the curve in terms of FedRAMP [cloud security] compliance.

"It takes some work to become a thought leader in this space and to stay relevant as one. We think the work we are doing around M-19-21 and NARA compliance will help us maintain our leadership position going forward."

For more information: <u>http://bit.ly/M-19-21;</u> <u>http://bit.ly/QAImicrosite;</u> <u>http://bit.ly/FADGIreferencedoc;</u> https://www.archives.gov/records-mgmt/resources/self-assessment.html

#### February 7, 2020

#### Document Imaging Report 5

## OCRolus+ Opens Platform to Tech Partners

**OCRolus**, a document capture services ISV that targets the lending industry, recently introduced a new platform that has the ability to leverage technology partners. OCRolus + was introduced at a launch party held late last year in New York City, the city where the company is headquartered. The initial launch of OCRolus + leverages technology from **Plaid**, a service for connecting to online bank accounts, and **SentiLink**, which specializes in detecting identification fraud.

"OCRolus+ is designed to introduce partners' services to augment our core offering," said Sam Bobley, CEO of OCRolus. "We are not intending to go down the app store model—I do not anticipate we will be offering hundreds, or even dozens, of different plug-ins. The idea is to provide a curated set of tools that our customers are already interested in. We can deliver them through our customers' existing connection to our platform, which will save them technical work and mindshare. With OCRolus+, our customers will only have to interact with one API to access best in class services across a few different areas."

OCRolus was founded in 2014 and was projecting about \$10 million in sales for 2019. Its initial customers included many leading lenders to small businesses, like **Funding Circle**, **Blue Vine**, and **OnDeck**. One differentiator for OCRolus is its ability to automate the capture of data from bank statements. OCRolus utilizes a "black-box" approach—meaning it provides its customers with accurate data from day one. The software training is done behind the scenes. It learns as people key enter data from statements and other types of documents [see <u>DIR</u> 8/30/19].

"We continue to find new use cases in lending," said Bobley. "We now have many of the top consumer lenders, like **SoFi**, **LendingClub**, and **Upgrade** as customers. Our initial use cases in that market are around smaller-ticket personal loans.

"In 2020, we will have a big push and focus on mortgage. We have about a dozen mortgage customers already, including a major partnership we are gearing up to announce in the next couple months. Mortgage is probably the best area for us to expand into because there is such a vast amount of documentation required for each mortgage application. In addition, our personal loan business dovetails nicely into mortgages and other consumer products. That said, we remain asset-class agnostic. For almost any loan, the lender is trying to do income verification and a know-your-customer process, and we facilitate both of those."

Bobley explained how the new partner offerings will complement OCRolus' data capture and security features. "The main purpose of Plaid's service will be to corroborate data we have already captured," he said. "For example, say a borrower goes through SoFi and submits their bank statements and pay stubs, which SoFi runs through OCRolus. We give SoFi an analysis that they can use to calculate a person's income, which they can then use to make a loan offering.

"But before SoFi funds that loan, they may want to link to the borrower's bank account. Our partnership with Plaid enables us to ingest the borrower's log-in credentials, which Plaid can use to pull down information from their online financial statements to see if it matches the information that was submitted. This provides a last layer of defense against abnormalities and fraud. It also allows the lender to have an ongoing digital connection to the borrower's banking information."

Bobley described SentiLink as an "enhanced fraud detection product." "It enables us to look for synthetic ID fraud," he said. "This means we can better determine if somebody is using a completely false identity. For example, say I was applying for a loan under the name John Smith; I submit a bank statement with that name and everything looks good. I show a strong income and am about to qualify for this loan. Through a partnership with SentiLink, the lender could then run statistical techniques that would determine if John Smith is my real identity by doing things like confirming a birthdate, a social security number, etc."

OCRolus divides its offering into three areas, Capture, Detect, and Analyze. Plaid is being marketed as a Capture+ offering and SentiLink as Detect+. "Analyze+ is going to be our next iteration," said Bobley. "We are currently bolstering our analytics capabilities and will make an announcement about some enhanced analytics in the next few months."

For more information: <u>http://bit.ly/OCRolusplus;</u> <u>https://campaigns.ocrolus.com/ocrolus\_plus</u>

#### 6 Document Imaging Report

## **DocuWare Enjoys Banner** 2019

2019 was a busy year for **DocuWare**. The year kicked off with a change at the top, as longtime co-presidents Jürgen Biffar and Thomas Schneck retired and were replaced by their colleagues Dr. Michael Berger and Max Ertl in the roles of overseeing the technical and sales aspects of the business, respectively. Then in

March, the Munich-area based ISV named Jim Roberts, a global sales and marketing executive from outside the ECM industry, as the new president of DocuWare Corp., the Americas-based arm of the company. Finally, in July came the kicker, as DocuWare was acquired by long-time partner Ricoh Company, Ltd. (RCL) [See



DIR 8/30/19].

Jim Roberts, president, DocuWare Corp.

Through all this change, two elements of DocuWare's business remained stable: its focus on the cloud and on cultivating its reseller channel. This focus apparently paid off, as for 2019, DocuWare recently reported 17% YOY growth to reach approximately \$60 million in annual revenue. This was after only 6% growth in 2018.

"I have only been here for a year, so it's difficult for me to compare what we did in 2019 to what we did in years past, but my feeling is that it wasn't much different than what we've done historically," said Roberts, who joined DocuWare from Telesis Technologies, a leader in product identification and traceability technologies. "It's business as usual, with a clear division of roles between the presidents, just like we had before. We continue to try and make improvements and scale the business."

DocuWare was one of the earliest ECM vendors to fully embrace the cloud, dating back to a one million Euro investment it made in Web-based and cloud technology 10 years ago [see DIR 2/5/10]. It wasn't until 2015 that DocuWare began to see significant acceleration in cloud adoption by its customers, and in 2019, approximately 60% of its new customers adopted DocuWare Cloud. Last year, cloud revenue accounted for nearly 25% of DocuWare's overall revenue.

"We added nearly 2,000 customers in 2019 and 1,200 of them were cloud customers," said Roberts. "Having a strong and reliable cloud service enables us to access more customers who value features like mobility and security. They also see the cloud as an advantage because it means they don't have to tackle the IT infrastructure component of an ECM implementation-we handle that for them."

In 2018, DocuWare introduced pre-configured, hosted solutions in the areas of invoice processing and employee management [see DIR 6/22/18]. "We've had some nice results with those in Europe especially," said Roberts. "They enable a customer to obtain a document management solution and apply it to help automate a specific process like accounts payable in matter of days. That was unheard of in years past, when it could take weeks and sometimes even months, depending on the complexity level of configuring a system to meet a specific need."

Roberts noted that DocuWare will continue to work on improving its cloud functionality. "We will continue to add features to our product on a repeatable schedule, as well as continue to invest in the reliability and security of our cloud infrastructure," he said. "We believe the investments we are making will enable us to maintain a 94% customer retention rate, which ultimately enables us to continue to build market share. This, along with expanding our partner network in 2020, should also help us to further accelerate new customer acquisition."

Roberts views partners as the key for DocuWare to reach the hundreds of thousands of potential SMB customers in the market. "We continue to onboard new and effective partners who are able to help us service marketplaces where we are either under-represented or non-existent." he said. "We are expanding in our traditional space, which has been the MFP channel and ECM resellers, and we have also seen some success selling DocuWare through companies that specialize in other types of software like ERP, CRM, or something else. Most of these resellers also have a cloud option of their other software."

Regarding how the acquisition by RCL has affected DocuWare's business so far, Robert's stated, "The integration is still in process, but we are already seeing a lot of positive signs."

For more information: https://www.documentimagingreport.com/?p=6736

# Takes on a Couple Recent IPA Developments

One of our predictions for 2020 was increasing traction for the term "intelligent process automation." To us, IPA makes sense in our market because it involves using artificial intelligence, or machine learning-based pattern matching, to automate business activities that typically have at least some pattern to them. After all, this is kind of the foundation of automated document capture, as well as workflow, with the new element being the introduction of "hot" and evolving Al algorithms.

Last year, we discussed both **Kofax's** and **Nintex's** movements in this area. Kofax, of course, owns capture and BPM technology, into which it is introducing AI and machine learning [see <u>DIR</u> 6/14/19]. Last year, Nintex acquired a small RPA ISV to help expand its process automation platform [see <u>DIR</u> 8/30/19]. And ABBYY, a capture market leader, acquired TimelinePI to help its customers better monitor and manage the processes they are automating [see <u>DIR</u> 5/24/19].

ABBYY Chief Innovation Officer Anthony Macciola recently commented that he was not surprised to see **Appian**, which is an ABBYY partner and competes with Nintex in the business process automation space, acquire Novayre Solutions SL, developer of the Jidoka RPA platform, earlier this year. "Appian acquiring RPA capabilities is not a new move among [BPA] platform providers," Macciola said. "Pega acquired its RPA capabilities in 2016. There's certainly synergy between RPA and BPM to automate a subset of activities in a process using robots, as well as delivering full end-to-end process automation."

Macciola went on to stress the importance of adding intelligence to these platforms. "Regardless of the platform, a key part to any approach to any digital transformation strategy is that the digital worker and process both need to continue to become more intelligent," he said. "From ABBYY's perspective, that means delivering easy to configure, train, and consume technology that can turn unstructured content into structured, actionable information, deriving quick ROI out of content-centric processes."

Of course, the trick is correctly applying AI and machine learning to automate business processes. Similar to the way ABBYY has introduced its Vantage platform to help democratize capture, in 2019, **Microsoft** introduced AI Builder to help end users build their own AI-driven applications. At its Ignite conference, Microsoft showed a demo of AI Builder being used on the front end of its Form Recognizer and Text Analytics document capture services to build an application that could be used on SharePoint documents. This was being packaged and made available as part of Project Cortex, which is due for release in the first half of this year [see <u>DIR</u> 11/15/19].

Scott Opitz, founder of TimelinePI and president, ABBYY Process Intelligence, views AI Builder as a gateway to intelligent process automation. "Organizations looking to incorporate AI and machine learning capabilities want to solve their own technology problems with simple to use point-and-click automation and orchestration tools," he said. "Microsoft AI Builder is intended to make it easier for non-data scientists to experiment with AI technology, in other words, sophisticated AI for dummies.

"These tools are used for conquering low-hanging automation opportunities. Workers can use these simpler 'builder-like' frameworks to design sophisticated AI/ML approaches without having to understand the theory or inner workings of the underlying libraries, but this is not process analysis, automation or intelligence. It may be looked at as being 'the robot for every employee,' but solutions like Vantage and Timeline will provide the digital intelligence for streamlining and improving content and processes in the modern digital enterprise across systems and departments and not just to a few employees' desktops."

## HSA VENUE, FROM PAGE 1

miles from O'Hare airport, so there will be less travel time to and from the venue."

Spencer added that the Eaglewood includes all the amenities HSA was looking for. This includes good internet access, a pleasant and configurable conference room, a comfortable room for the opening night exhibits and reception, a quality selection of food and beverages, and an on-site bar for networking. While the new location is slightly larger, Spencer indicated that HSA has no plans to increase the number of attendees to greater than 100. "Ideally, I want to make it an exclusive event focused on the area we specialize in with limited exhibitors and sponsors," he said. "I want it to be 'the Davos' of Capture!"

For more information: https://www.hsassocs.com/capture/

8 Document Imaging Report