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Evolutions in Document Imaging

Adding intelligence for automated workflows

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Document imaging and capture is playing an essential role in digital transformations and end-to-end processes across various business functions and customer-facing operations.

Along with the changing realities in the organization, document imaging is evolving. Just think about the link between consumerization, virtualization, the web, the cloud and mobile (workspaces) on one hand and decentralized scanning and document imaging/capturing on the other. Or about the evolutions in IT where the focus shifts to systems of engagement and customer/business value on one hand and the growing need to add intelligence in document capturing, processing, conversion and extraction processes on the other.

Document capturing and (intelligent) data recognition

The first step in automating processes for document input, regardless of their nature (paper or electronic/digital) is capturing data using (intelligent) document recognition. Additional layers of intelligence can then be used for other typical tasks such as routing the data/information, processing it, archiving it, etc.

However, as research we conducted with AIIM shows, there is still quite some work on the essential levels. Although 56% of surveyed professionals use data recognition at some point in their document capturing and management processes, this is still just over half and the data recognitions is certainly not used in key processes where it could be.

There are real business benefits to document intelligence, beginning with the actual capture using scanners and with capture solutions. Optimized processes allow organizations to reduce costs and, more importantly, focus on the value and business equation of the information process. This often revolves around customer experience optimization, cost efficiencies and better processes. The focus on customer experience can – and should – go hand in hand with the optimization of processes. The end result? Better efficiency, increased speed and customer-adaptiveness.

Moving from paper to business processes

In an increasingly digital world, organizations are facing entirely new ECM, information management and data challenges. Even so, it's easy to forget that many organizations still sit on mountains of paper that need to be digitized and turned into actionable information. Document imaging and electronic imaging are crucial operations for most companies, especially as they go through important transformations.

In the last two decades, organizations have been busy solving paper problems and they still do.

We evolved from capture to:

Advanced capture: extracting data from paper and linking it to systems of records
Business process management: for instance, invoice automation

Collaboration: SharePoint and others

Now we're moving to a fully integrated situation. Yet, at the same time paper problems still exist. In fact, as new non-paper inputs are coming into the organization we almost by default print and thus convert them to paper. Think about emails with or without PDF attachments, for instance. In fact, it is estimated that 45% of the documents that are scanned are born digital. (Roland Simonis in a 2013 AIIM webinar).

At the Harvey Spencer Associates Capture 2014 Conference, which we attended as well, Ralph Gammon, publisher of the well-known document capture and imaging industry newsletter "Document Imaging Report", gave a nice overview of ten years of capture market evolution and summed up five trends that were key in the market in the last decade on his blog.

1. **The consolidation of document capture with Enterprise Content Management (ECM).** This is the stage, mentioned above, where advanced capture came into play and enabled the extraction of data from paper in order to link it with the so-called systems of record, which ECM platforms originally essentially were (now evolving to systems of engagement).

2. **An aggressive movement of hardware vendors into capture software and services.** While physical equipment is by definition a solution, a full solution is often more holistic. Solutions can go broader to encompass capture software and services to solve a bigger customer business problem than can be tackled by hardware only. Further, the ecosystem of partners to analyze customer needs and implement an integrated solution is crucial to the mix.

3. The emergence of mobile and cloud technologies. The industry continues to evolve with mobile and cloud based solutions. Web-based document capture will change the face of capture and with mobile capture the limits of time and place disappear.

4. **The emergence of SharePoint as an ECM platform.** This adds collaboration to the equation. Additionally, BPM comes into play here with some of Ralph's other trends.

5. **The acceptance of distributed capture.** This is indeed what we increasingly see happening with evolutions such as web-based capture, mobile and of course, the cloud. It's not a replacement of other forms of capture, but an addition to an evolving contextual mix. As in so many other areas, hybrid here seems to become the IT synonym of "tailored to the individual business, customer and technology context", with scanning at the point of entry becoming more important.

Mailrooms and BPOs

Much of the document imaging and capturing work still happens in mailrooms, where we see several evolutions and opportunities for input management in the digital mailroom.

Often, many document capturing processes are done through BPO (Business Process Outsourcing), by service bureaus and by Document Process Outsourcers (DPO). These kinds of partners specialize in document imaging, processing, and management at the services entry point. As customer needs become more sophisticated, BPOs focus more on overall approach where document imaging and capture are part of a larger business-oriented conversation. The latter specialize more in industry-specific digital transformation.