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Standardizing on One Platform for Scanning and Document Capture

Results: reduction in operational costs and improvement in enterprise agility

Operating on a fragmented scanning and document capture infrastructure is a stark reality for many enterprises today.

Often companies have legacy scanning and document capture solutions due to:

the purchase of point solutions by departments or business units	a failure to consolidate systems after mergers and acquisitions	the deployment of systems to address a single document input channel

But, as document and data volumes explode and document input channels multiply, businesses need a standardized scanning and document capture infrastructure that is cost effective and flexible.

Failing to optimize scanning and document capture infrastructure hampers business operations by:

- creating manual processes
- obstructing information tracking and reporting
- complicating security and auditing
- requiring the purchase of new software and hardware as business requirements change, and
- potentially jeopardizing the business case for scanning and document capture technology.

However, running a mix of solutions acquired on a piecemeal basis is expensive and complex to manage. It may lack basic essential capabilities such as centralized administration. It can increase maintenance costs and require operators to have a strong knowledge of many systems.

Organizations shouldn't attempt a wholesale replacement of their legacy scanning and document capture systems, much less the deployment of an enterprise-wide platform all at once. Overly ambitious enterprise deployments are likely to get bogged down, delaying a return on investment and potentially resulting in second-guessing among senior managers whose support is required for a project to move forward. Deploying an enterprise platform all at once also may result in excess scanning capacity before organizations have completed their migration to the system.

A better approach to deploying an enterprise-wide platform is to think big, but start small.

1   Select a scanning and document capture platform that meets current and long-term needs.

2   Scale and deploy the solution to meet the requirements of a department or application.

3   Once the platform has demonstrated payback in its initial deployment, extend the platform to meet the requirements of another department or application.

> **The key to success is ensuring that the organization chooses a platform that meets both its current and long-term needs, while being able to cost-effectively scale to meet these requirements.**

The Inherent Complexity with a Diverse Environment

Running a mix of point solutions acquired on a piecemeal basis presents a number of downsides:

Poorly scaled hardware

A multiple system environment where software runs on dedicated hardware leads to excess capacity and wasted capital investments. Organizations must "rip and replace" hardware when their volumes or processing requirements change.

Poor user experience

In a mixed systems environment, staff must be trained on multiple point solutions, rather than on a single platform. Staff also must sign into multiple systems to perform daily functions, such as retrieving images and data. Similarly, a multi-system environment makes it virtually impossible to centrally administer and manage operations. It also is difficult, and sometimes impossible, to share images and data across disparate platforms. Even in cases where content can be shared, the cost of integration is very high. Upgrades to any one system may have the domino effect of requiring costly and time-consuming changes to the integration layer.

No support for multiple input channels

Most point solutions are designed for a single document input channel, requiring organizations to deploy multiple systems.

High maintenance costs

The cost and risk of supporting disparate systems and solutions are notoriously high, due to multiple support contracts, multiple points of contact when problems occur, and costly fees to maintain (customized) connections between systems

Lack of visibility

It is difficult to get timely insights when information resides in multiple systems. Similarly, operations managers cannot get a holistic view of how their various systems are operating across the enterprise. Fragmented scanning and document capture systems also limit an organization's ability to comply with internal, governmental and/or industry mandates for security, privacy, auditability tracking, and reporting. In industries, such as healthcare and financial services, strict data privacy and confidentiality regulations (such as the Health Insurance Portability and Accountability Act and the Payment Card Industry Data Security Standards) are difficult to comply with using fragmented systems.

Benefits of Standardizing on an ibml Platform

Significant business benefits come with replacing disparate scanning and document capture systems with a single platform that can handle all types of document input and adapts to changing needs.

ibml offers a suite of software and scanners that provide a scalable and adaptable platform for enterprise scanning and document capture.

ibml supports the following environments: remote scanning, centralized scanning, shared services, and centralized scanning with remote scanning requirements.

Here's how standardizing on ibml's platform eliminates the issues of a multi-system infrastructure:
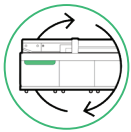
Improved hardware scalability

The ibml family of production scanners start at the desktop and scale to ultra-high-speed stand-up devices with the ibml Fusion series. This range of devices allows organizations to more accurately scale their scanning and document capture platform to the specific needs of a department, application or the enterprise. ibml scanners can be transparently interchanged or "mixed and matched" as needs change, enabling organizations to maximize their investments. For instance, a service bureau or in-house processor can initially deploy a desktop device and then migrate to ibml's ultra-high-speed scanners as volumes dictate. Hardware that an organization has outgrown can be used for backup/disaster relief.

Centralized information management

ibml Capture Suite provides operational intelligence to help organizations ensure regulatory compliance, improve tracking and control, and standardize scanning operations and the information they provide. Centralized authentication provides users a single login for secure, global access to all applications. Access can be customized for specific users and groups, depending on security requirements. This assists compliance with government, industry and customer privacy and security mandates. Additionally, our Analytics module provides a holistic view of performance metrics across an organization's scanning operations, providing more robust reporting. The consistent interface eases or eliminates the training burden on staff and improves usability as business requirements expand.

Integrated with legacy technology and processes

ibml Capture Suite is designed to work with all ibml scanners as well as those from other manufacturers, co-exist with any capture or downstream solution and support both distributed and centralized document scanning environments. Capture Suite also enables users to integrate existing multi-function printers (MPFs) with the centralized capture platform. Additionally, our PostScan module can format images and data for direct integration into a wide range of systems, including data capture solutions, enterprise

content management solutions, image archival, and workflow/business process automation. All of this significantly reduces the threat of information being misdirected, late or lost.

Quality control

Ensuring the optimum quality of scanning jobs is critical for organizations, particularly those with stringent service level agreements (SLAs), rapidly-growing volumes or multiple operation centers. ibml's Quality Control module allows users to quickly review images of documents and batches, and add comments to batches or individual documents. System administrators can pre-determine batches or documents requiring review based on a wide range of criteria, including transaction type, document type, or whether it is a flagged document. Batches can be automatically queued based on their priority.

Automated document classification and metadata extraction across input channels

Organizations of all sizes are receiving an increasingly diverse mix of documents from multiple input channels. ibml Synergetics employs full-page advanced test classification and image-based classification to identify and sort documents such as invoices, tax forms, mortgage documents, insurance applications, and medical records, regardless of the document input channel. Synergetics uses barcodes and other values on documents to automatically determine where a document starts and ends.

Decreased cost of ownership

Leveraging ibml's end-to-end platform provides organizations with a single point of contact in the event of a system problem. This reduces support costs, accelerates problem resolution, streamlines staff training, and eases system administration.

Finally, standardizing on ibml's platform means organizations will have consistent capabilities across their applications, departments, or enterprise. In a multi-system environment, staff frequently cannot perform tasks or find necessary information because they are on the "wrong" system.

The Bottom Line

There is no letup in sight to the growth of document and data volumes and the value of gathering accurate data as quickly as possible. With so much at stake, selecting the right scanning and document capture infrastructure is critical to a company's ability to meet its current and long-term requirements. Organizations can achieve significant benefits by standardizing on a single scanning and document capture platform, starting with one department or application and extending the platform after is demonstrates return on investment. The ibml software suite and scanners provide a foundation for companies to lower total cost of ownership, improve efficiency, increase information visibility, and centralize administration and tracking. Standardizing on the ibml platform also enables companies to meet current and future requirements.

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