



Document Imaging: What's, How's, and Why's

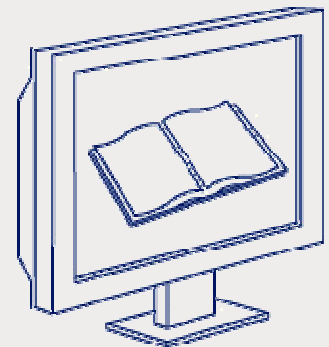


Imaging for Users



Document Imaging

- **Why's**
 - **Most important of the three questions**
- **What's**
 - **A better understanding of what a solution does for your organization**
- **How's**
 - **How do you go about doing this?**



Managing Documents Today

- What type of docs do you have?
- Where are they stored?
- How many docs or pages do you have?
- How many people do you have using docs?



What Are The Problems Today?

- **Cost (at lots of levels)**
- **Loss potential**
- **Storage space limitations**
- **User access & simultaneous access**
- **Legal requirements**
- **Other?**

Paper Management Statistics*

- Workers create 45 pages/day
- Filing space doubled every 10 years
- 4-5 drawer cabinet holds 3,000 pages
 - Occupies 6.7 square feet of floor space
- Most records are more than 4 years old
 - Retrieved less than 4 times/year



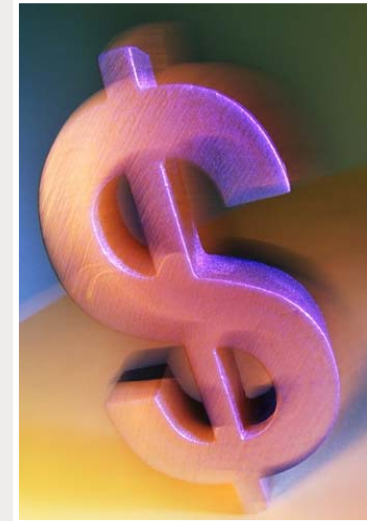
More Paper Management Statistics*

- 32% of docs are unavailable
 - In use
 - Misfiled
 - Lost
- Costs \$60-\$120 to locate misfiled docs
- 25% of filing time is spent walking



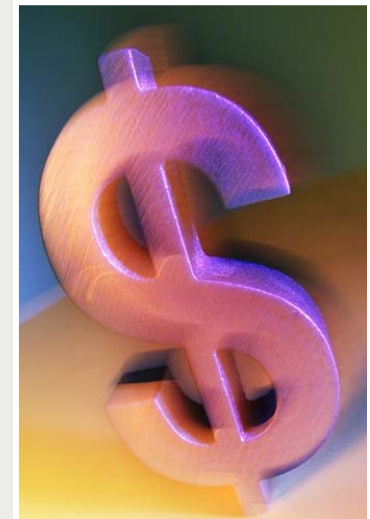
Take A Look A Costs

- Locate and retrieve 1 paper doc = \$0.80
- One person 10 docs/week = \$416 annually
- 20 people 10 docs/week = \$8,320/annually
- 40 people 20 docs/week = \$33,280/annually



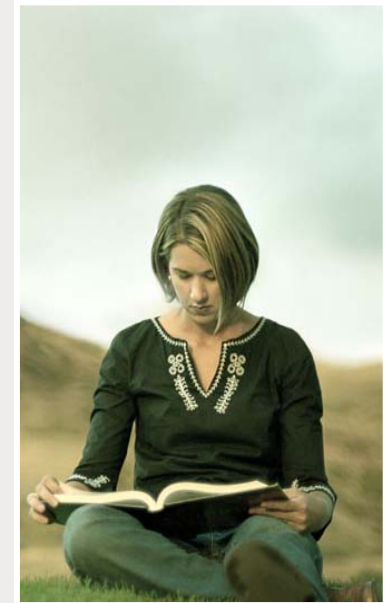
Return on Investment

- **Dollars and cents issue**
 - Cost reductions
 - Revenue increases
- **Non-financial benefits**
 - Productivity
 - Customer satisfaction
 - Better use of information
 - More...



ROI Considerations

- # People handling documents
- Time per day per person to retrieve/file
- Average hourly salary per person
- Time spent copying per person
- # copies made per day
- Time spent filing per person per day
- Document storage expenses

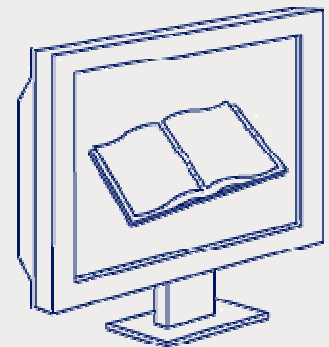


Another View on ROI

- On the one hand, it's nearly impossible to get a project going without a clear (and quick) ROI
- On the other, records management may be exempt from such considerations.
- “If you're going to senior management, there is nothing that gets their attention more than saying that if you implement this, it will help you avoid going to jail.”
 - “Top of the Show,” May/June 2003, aiim.org

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Document Management Systems

- **Input**
 - Capture “content” into electronic format
- **Identification**
 - Store related information
- **Storage**
 - Provide a safe, central repository of this content
- **Retrieval**
 - Fast, easy, potentially “from anywhere”
 - Apply security
 - Display, annotate, manipulate

Document Management Systems

- **Integrated with another application...**
 - Provides context
 - Provides multi-point access
- **Specialized technology**
 - Scanners/workstations to capture
 - Server(s) and database to store
 - Client software to capture & view
 - Printers (sometimes)

What's Being Done?

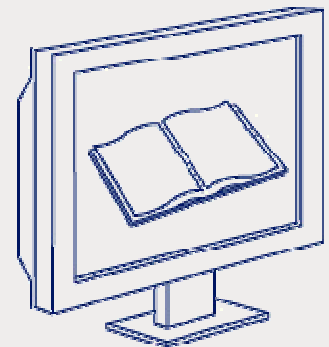
- **Data entry**
 - Lockbox imaging and delivery
 - Optical character recognition: faster, may be more accurate
- **Legal documents**
 - Gift agreements
 - Contracts/grant awards
- **Stewardship**
 - Reports stored
 - Reports delivered online
- **Contact reports**
- **Research files**
- **More...**

Advanced Software Integration

- **Various levels**
 - From person or corporation record only
 - Copy-and-paste IDs
 - Not at all
- **Needs**
 - Accessible “from anywhere”
 - Consolidate vendors
 - Desire for “context” on capture and viewing
 - Enhanced coding of documents
 - Enhanced security for capture and view
 - Look-up/querying
 - Single Sign On

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Technology

- **Storage**
 - Traditional “server”
 - Optical disks on a jukebox
 - Rough estimate: 50K storage per black & white page
- **Scanning location PCs**
 - Current class PC
 - Usually not dedicated to this task

Technology

- **Scanners**

- Range from very low-end (c. \$600) to high-volume, high-speed, duplex

- **Viewers**

- Browser-based
- With/without plug-ins as appropriate
- True “client”



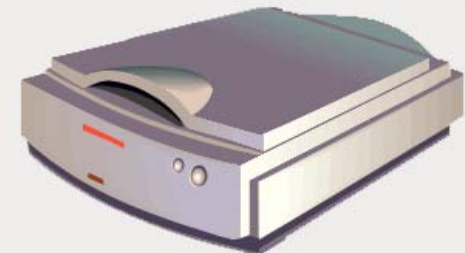
Backscanning and Scanning

- **To backscan or not to backscan?**
 - Requires extensive document preparation
 - Selective backscanning best (if done at all)
 - “Mass” backscan, provide context later
 - Can be outsourced
- **Daily scanning**



Other Considerations

- **What gets scanned?**
 - **Records vs. documents**
- **Who does the scanning?**
- **Scan quality?**
 - **Highlighting makes a difference**
- **Back-ups**
- **What to do with the paper files?**
- **Security – who has access to images?**



Benefits

- **Faster access**
- **Simultaneous**
- **Access**
- **Querying**
- **Reduced training**
- **Time**
- **Preservation of key**
- **Docs**
- **Better file retention**
- **Single storage**
- **Location**
- **Reduced risk of loss**
- **Less physical space**
- **Requirements**
- **Enhanced disaster**
- **Recovery**
- **Customer service**
- **Others**

General Notes

- **Many names**
 - Document imaging
 - Electronic content management
 - Enterprise content management
 - Integrated document management
- **What can be “imaged”?**
 - Most electronic “content” – docs, pictures, video, audio
- **Image more than just advancement info**

Sources For More Information

- **AIIM** – <http://www.aiim.org/>
- **Cal Poly** – <http://irmppc.calpoly.edu/2001/Imgover.doc>
- **CASE** – <http://www.case.org>
- **Gartner Group** – <http://www.gartner.com>

Some Vendors in Higher Education

- Feith – <http://www.feith.com>
- FileMark – <http://www.filemark.com>
- Hyland Software – <http://www.hyland.com>
- IBM – <http://www.ibm.com>
- Identitech – <http://www.identitech.com>
- ImageTag – <http://www.imagetag.com>
- KeyFile – <http://www.keyfile.com>
- Nolij – <http://www.nolij.com>
- OpTech - <http://www.docfinity.com>
- Optika – <http://www.optika.com>
- PaperClip - <http://www.paperclip.com>
- SunGard BSR – <http://www.sungardbsr.com>
- SunGard SCT – <http://www.sct.com>
- SunGard Workflow Solutions –
http://www.sungard.com/products_and_services/workflow

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