

# Create, Capture, Collaborate:

Your Content Drives Organizational Value



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# Create, Capture, Collaborate: Your Content Drives Organizational Value

By Peggy Winton CIP, President & CEO, AIIM

If you've been paying attention to the research we conduct and the educational information we share, you know that AIIM describes Intelligent Information Management (IIM) as all the things you want to do with, or get from, your organization's information. We break these up into five key categories of actions or aspirations.



Get the five-domain IIM infographic [here](#)

Obviously, there aren't hard boundaries between any of these – they are dynamic and overlapping – but isolating them helps us drill down into their unique characteristics and capabilities. It also helps identify the skills and the solutions required to achieve the business objectives they enable.

The first IIM category is all about your content – creating it, capturing it, and collaborating with it. We often refer to this as the onramp for the downstream processes that follow. Get this step right, and the subsequent IIM steps will become easier. The goal of this stage is a flexible and modular approach that utilizes content and information wherever and whenever it is needed, independent of where it is stored. As we pursue this objective, it helps to analyze our current state and maturity level against these two key questions:

1. Do you use artificial intelligence to help automatically process and categorize incoming information in all forms as it enters the organization? And do you automatically extract the data and information that is necessary to initiate or drive core business processes? This set of capabilities is commonly known as **Intelligent Capture**.
2. Do you have an explicit strategy and systems to encourage collaboration, especially across virtual workforces and organizational boundaries? These are the ideal attributes of a **Digital Workplace** that leverages Organizational Intelligence.

Let's take a deeper look at these capabilities to see how changing business drivers are impacting their application. Then, with help from contributors in the chapters that follow, we'll see how your peers in a variety of industries are pivoting to meet these new challenges and rising to new levels of content management excellence.

## Capture is shifting from something that is done as an afterthought and with an archive focus to something that must be done as soon as information enters the organization.

Capture has been part of the content management equation for over two decades and represents some of the most proven and mature solutions. For many years, capture was somewhat of an afterthought. ...It was something focused primarily on paper documents. ...It was something focused on archiving the document rather than on extraction of data from the document. ...It was something you did at some point after information entered the organization. ...It was usually done in the context of one particular business process and needed to be customized to that process. If yours is like many organizations, you now have a hybrid of paper and digital inputs for things like invoices, contracts, claims, receipts, and shipment documents; and you will do so for the foreseeable future. This means that disparate digital and paper information streams need to come together in a single stream in order to be managed efficiently.

“

**AIIM action item:** Understand the ongoing role that paper plays and where it can logically be eliminated. But also understand where it remains a key element in some customer experiences; focus on digitizing the paper as it arrives.

”

## Concerns about information privacy and security are increasing.

The growing complexity of privacy and security concerns means that organizations must: a) govern information from its creation; and b) automate the governance process. Many organizations operate in an environment in which users are encouraged, expected, or required to identify and capture their own information. There is some value to this approach – users are most knowledgeable about their business processes and activities and should be the best-positioned to determine what is important and where to store it. But the reality is something different. In the vast majority of organizations, most users do not identify, capture, and manage their information properly. They simply don't.



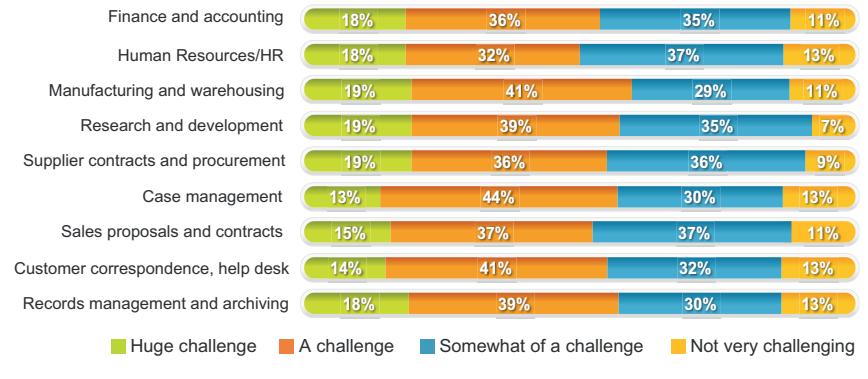
## Automated processing of information is critical to everything that follows.

Intelligent capture is assuming a key role in triggering and automating downstream business processes. That's why it's important to select the appropriate file format for creating and capturing content based on the intended business use. Many document-driven business functions have either reached or are reaching their 'tipping point' for automation – the point where automating processes becomes critical to accomplishing core tasks with high quality and in a timely manner. This is especially the case where organizations are receiving documents through a variety of delivery channels. Organizations are realizing that processes simply cannot be automated until the unstructured information that underlies them is in a machine-comprehensible form.



In over 50% of core back-end business processes, unmanaged unstructured content remains a significant problem.

For each of the following processes, think about how much of a challenge structured and unstructured information represents in your efforts to semi-automate.



Source: AIIM Industry Watch, 2019: ["You're Working TOO Hard – Using Intelligent Automation to Save Time, Money, and Effort"](#)

“

**AIIM action item:** Before automation and integration of business inputs can occur, consolidate capture capabilities – both at endpoints and at the edge of digital content creation.

”

## Advances in artificial intelligence (AI) and machine learning (ML) are changing the capture game.

Radical improvements in capture efficiency and accuracy are driving a reevaluation of legacy capture platforms. Organizations must embrace AI and ML tools to take the friction out of the process of manually classifying incoming information and assigning relevant metadata. The ability to use ML to train systems to identify and extract key metadata and process information from semi-structured and freeform documents is critical to automating the capture process. AI and ML capabilities need to be viewed in two contexts by user organizations. The first is the more traditional context – how these tools are being used, and could be used, to improve business processes and gain insight. But effective AI and ML projects require machine-comprehensible information, and that is the second context – how these tools can be applied to the process of making information machine-comprehensible. This is done by adding context to unstructured information.

“

**AIIM action item:** Understand that content – in all of its forms, not just documents – is the toughest information type to make machine-comprehensible.

”

## Intelligent capture is key to fully optimizing emerging robotic process automation (RPA) capabilities.

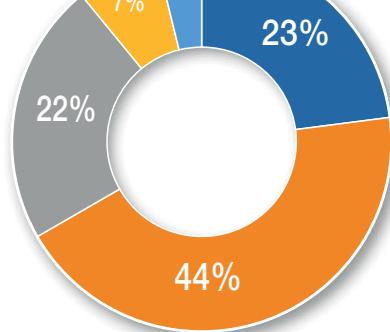
The ability of organizations to fully leverage their RPA investments rests completely on whether these engines can ingest and digest unstructured and semi-structured information. Automatically extracting key data from incoming information streams and using this data to activate process flows is the ultimate objective of Intelligent Capture. This is where technologies like robotic process automation (RPA) can act as a key bridge and extend the life and functionality of legacy BPM and ECM systems, and also extend process automation functionality to a much larger percentage of knowledge workers than is traditionally possible. But RPA engines will only reach their full potential if both the context and the content of information is fully understood and integrated into line-of-business applications.

## Most organizations understand the problems created by overflowing and incompatible information silos and they recognize the need to do something about it.

Whether it's finding the right information an employee needs when onboarding to a new role or ensuring that another employee's work artifacts are captured for future use, retaining, maintaining, and accessing this organizational knowledge can be a key strategic differentiator. Nearly 70% of you agree.

## How important is it to your organization to have an easily curated system for tapping knowledge?

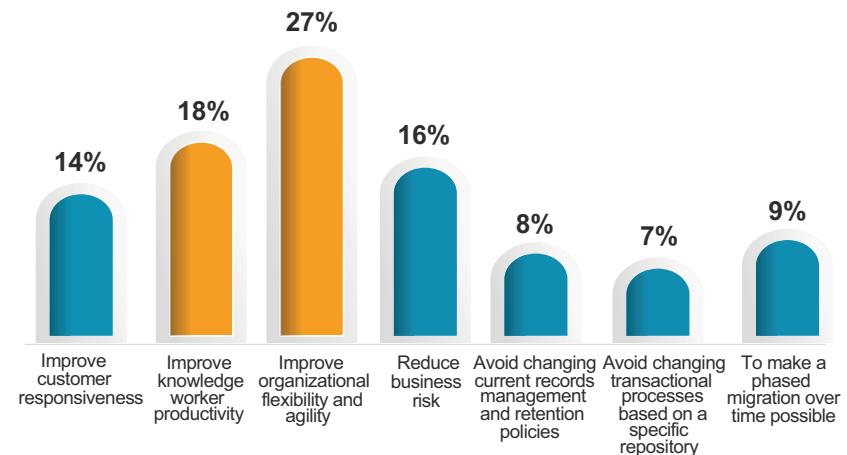
■ Extremely important ■ Very important ■ Somewhat important  
■ Not so important ■ Not at all important



Source: Unpublished data from AIIM's 2021 State of the IIM Industry research

It can also be a BIG challenge for many organizations, largely due to the level of effort required to find scattered and siloed information. In far too many organizations, siloed content repositories and disconnected process applications create an environment in which knowledge workers must act as human system integrators, copying/pasting information from where it is stored to where it is needed. When we asked AIIM community members what the most important reason was for undertaking a content migration initiative, you said to improve organizational flexibility and agility (27%), followed closely by improving knowledge worker productivity (18%).

## What is the MOST important reason to consider a content integration platform?



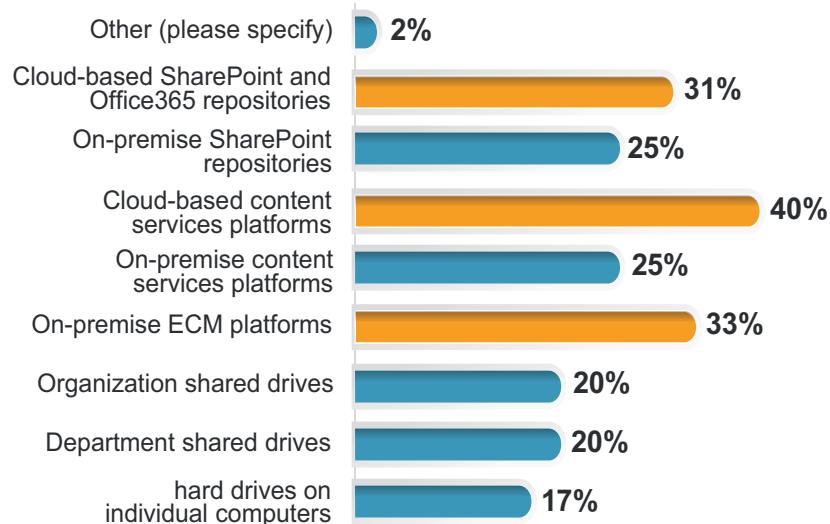
Source: AIIM Industry Watch, 2019: ["Building an Effective Strategy for Content Integration and Migration"](#)

**The extension of content services to the cloud becomes the logical step forward for a digital transformation that ensures content is consistently available, accessible, and shareable.**

Because of the growing confidence in cloud applications, a shift is emerging where business leaders and department heads are quickly identifying impediments to their teams' effectiveness, and they are not hesitating to introduce cloud-based technology to enhance their departmental operations. They are starting to recognize that the cloud is not just about storage, cost savings, mobile access, and flexibility.

Deploying content services in the cloud represents a unique opportunity to rethink and reconfigure how business processes can evolve to be cloud enabled, which has the potential to enhance personal productivity, customer experience, and overall organization efficiency with solid governance and control.

### Where are you trying to migrate content TO?



Source: AIIM Industry Watch, 2019: [“Building an Effective Strategy for Content Integration and Migration”](#)

**Naturally, the COVID crisis has forced organizations to rethink how they view remote work, remote workers, and the productivity systems used to support them.**

Rapid adoption of enterprise tools for connectivity, collaboration, information sharing, and knowledge management has enabled thousands of organizations to maintain continuity. It has also presented new levels of complexity. One of the biggest issues to adopting enterprise tools at this pace and scale is that the necessary steps between deployment and full adoption are not always taken. The result: an unmitigated content mess!

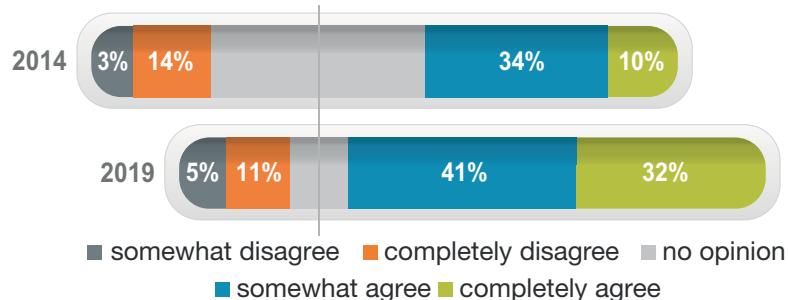
“

*From AIIM’s Certified Information Professionals (CIPs) in the AIIM State of the Intelligent Information Management Industry Watch, 2021: “You can’t control what you can’t see. For our organization, the problem was not the sheer number of repositories and systems; the problem was not even knowing what we had.”*

”

So, the flip side of information creation and retention is simply getting rid of ROT (information that is Redundant, Obsolete, or Trivial), and doing so safely, confidently, and seamlessly. A big change we’ve seen over the past five years is the adoption of tools to automate this process.

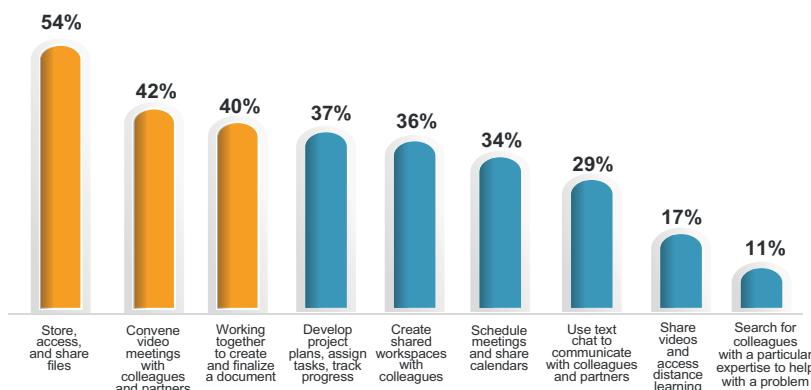
**Agree or Disagree?**  
**Automated classification is the only way to keep up with the volumes coming at us.**



Source: AIIM Industry Watch, 2019: ["Best Practices for Automating Information Governance"](#)

When we look at the kinds of collaborative capabilities that most organizations are focused on, it's pretty much the basics like file management, video, and content authoring as top priorities; that shouldn't be surprising in a distributed work environment.

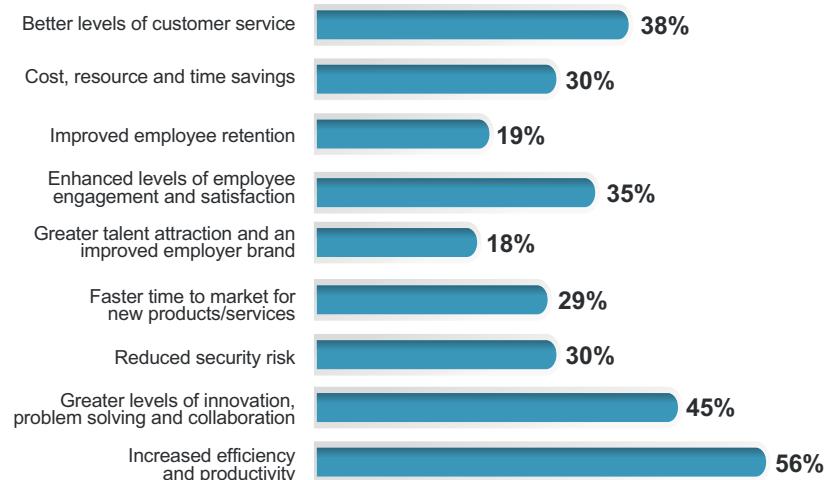
**Which three of the following collaboration activities are the MOST critical to your organization in achieving its business goals?**



Source: AIIM Industry Watch, 2020: ["Mastering your M365 and SharePoint Investment"](#)

But there is a growing desire to leverage document-centric collaboration for digital workplace effectiveness. Automating how work moves through an organization to support key business processes (particularly those for a demanding customer base) is an area of interest for most.

**What are the three most important goals of document-centric collaboration?**



Source: AIIM Industry Watch, 2019: ["Implementing a Digital Workplace Strategy"](#)

## Not all Capture and Collaboration Journeys will be alike.

Where you are should determine where you start. Choose a strategy and a platform that can evolve over time. Here is advice for setting the right foundation from the CIP Study Guide:



- 1. Identify sources of content to be captured** (e.g., paper, microfilm, email, born-digital, legacy sources such as file shares).



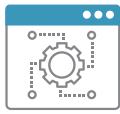
- 2. Explain the challenges associated with managing digital information** (e.g., determining what to capture and how, the dynamic nature of some digital information, how formats impact capture and management).



- 3. Select the appropriate file format for creating and capturing content based on business requirements** (e.g., target audiences, access to content over time, regulatory requirements).



- 4. Determine the impact of using proprietary file formats on information creation, capture, and access.**



- 5. Identify specific types of content to capture that provide unique challenges** (e.g., email, social media, forms, rich media) and determine how to capture them (e.g., using a digital asset management system).



- 6. Distinguish between structured and unstructured information** and the differences in how they are managed.



- 7. Determine methods for extracting and capturing data from structured applications.**



- 8. Determine methods for capturing structured data using electronic forms.**



- 9. Develop a process for capturing content** (e.g., what to capture, approvals, audits).



- 10. Determine strategy for capture** (e.g., dayforward, backfile conversion, on-demand, and factors that contribute to each).



- 11. Select the appropriate file format(s) for captured images based on business requirements** (e.g., number of pages, compression, need for Webbased access, need for public access, bandwidth).



- 12. Identify issues associated with file conversion** (e.g., between formats, from digital to analog).

# ADDITIONAL READING

**What is Information Capture? Definition, Purpose, and Value**

<https://info.aiim.org/aiim-blog/what-is-information-capture-definition-purpose-value>

**What to Capture VS What NOT to Capture**

<https://info.aiim.org/aiim-blog/information-capture-vs-not-information-capture>

**8 Tips to Create a Data Migration Strategy**

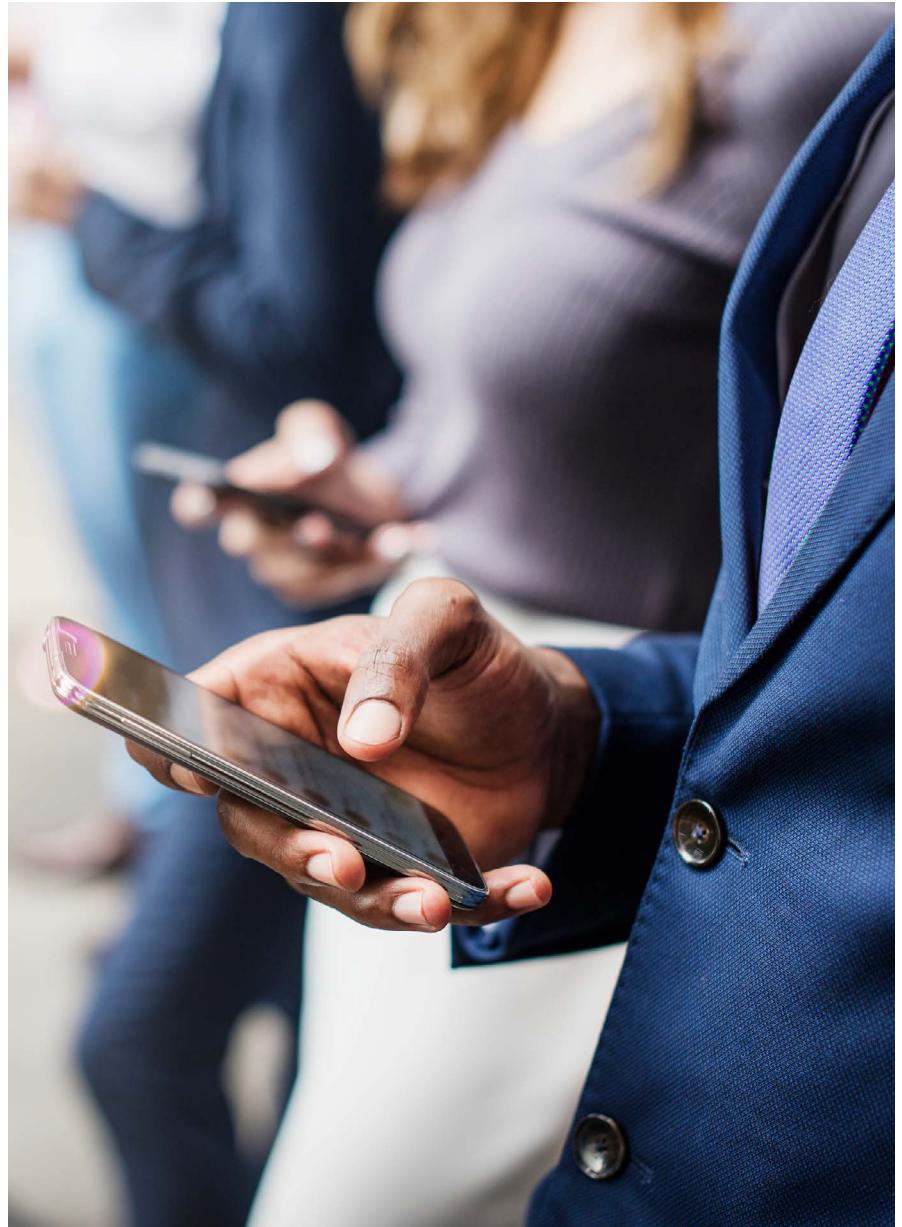
<https://info.aiim.org/aiim-blog/data-migration-strategy-tips>

**Get “Fully Connected” with Your Disparate Systems and Siloed Information**

<https://info.aiim.org/stay-competitive-with-connected-and-flexible-systems>

**Knowledge Sharing: 5 Strategies to Share Knowledge In the Workplace**

<https://info.aiim.org/aiim-blog/knowledge-sharing-strategies-for-the-workplace>





# Supercharge Your Search Accuracy with Auto-applied Email Metadata upon Ingestion

By Colligo

As the amount of data entering the organization proliferates, and the amount of content with business value (deemed a “record” in many cases) also increases, organizations everywhere are struggling with a massive information overload problem. Content is running rampant and sprawling, and records are being captured improperly, making discoverability and the resulting value of that information significantly lower.

Properly capturing and organizing content is the solution. The focus needs to be on properly tagging and classifying content as it comes into the organization, not after the fact, which has long been the case in records and content management. Modern work has changed. The ever-increasing petabytes of data required to do business in the modern world of work require utilizing metadata to tag content.

Why metadata? Metadata (aka tags, properties, labels) is the key component in any robust Information Architecture plan. Metadata describes a document externally, separate from the content contained within it. Metadata supercharges search accuracy and can function as a trigger for auto application of Microsoft Labels, which ensure appropriate retention and access rules are applied. As useful as metadata is, user adoption of the process of applying metadata at the point when files are ingested into a document management system has historically been a struggle.

We recommend you develop your Information Architecture plans using a bottom-up approach, engaging each business unit to ensure storage is designed to meet the practical needs of the business, such as rapid and relevant search results or the ability to extract sets of documents to comply with regulatory audits or requests.

How can this be done? Colligo recommends using a leading content services platform (i.e., SharePoint) along with a third-party application to fill any functional gaps. Of course, the future of work includes more automation and more intelligence. Automating the application of labels to content as much as possible is an important component of this. The best approach is to marry the automation

available today with some manual direction to ensure the appropriate labels are being applied, and to make the process as seamless and intuitive as possible. For records managers and administrators, this means enabling your team to auto-apply most metadata and save as easily as possible, while not having to police every move.

Content today is stranded in silos; as part of Intelligent Information Management, we need to break down those silos first by recognizing that most records are still received through email today. In fact, [knowledge workers spend 40% of their time in Outlook or other email applications](#).

Bridging email with the content services platform or system of record of the organization (i.e., SharePoint) is critical to ensure content ends up in the right place and is searchable across the organization. This becomes even more imperative in the world of remote work, ensuring collaboration is easy and accessible from anywhere (and in the cloud).

In summary, including email in your Information Architecture design is essential when you consider how many company records enter your organization by email. Storing email in SharePoint with automatically extracted metadata is ideal to capture and preserve records and knowledge, and utilizing a third-party solution like Colligo Email Manager facilitates quick and easy email capture along with pertinent metadata for those utilizing SharePoint Online and Microsoft 365.



## About Colligo

Colligo brings the best of SharePoint into Outlook and everyone's favourite Microsoft 365 apps. Our solutions make email and document capture, records classification, and collaboration simple. In business for over 20 years, Colligo is a Charter Member of the Microsoft Content Services Group and a member of the AIIM Leadership Council.

For more information visit

[www.colligo.com](http://www.colligo.com)



## Empower and Secure Hybrid Workplace

By Fasoo

The COVID-19 pandemic crisis has changed most everything. Technology, social, and cultural disruptions forced organizations to shift rapidly, expanding remote work capabilities. As we approach the post-pandemic era, a new normal has emerged in workstyles and businesses look to foster and enable a hybrid workplace. With this massive transition underway, many organizations struggle to maximize productivity and resilience while building a seamless and secure digital workplace.

Virtual computing infrastructure and a content collaboration platform are two critical components in the hybrid workplace. However, both fall short in today's cloud, mobile, and third-party working environments. Virtual desktop infrastructure (VDI) can be quite expensive to implement at scale and achieve the required network performance. And with multiple collaboration tools deployed, organizations lack a consolidated platform causing content management overhead, security gaps, and siloed assets.

Content virtualization is a new approach that eliminates costly virtual infrastructure and provides a consolidated approach for content collaboration. Documents (MS office documents, PDFs, images, CAD/CAE formats, etc.) themselves are “virtualized” so no matter where they reside or travel, or the collaboration application employed, you are always presented the latest document version whether accessed from your mobile device, desktop, file server, or cloud storage. It’s a powerful new technology made for today’s hybrid environments that embeds content management functionality, security, and control in the document.

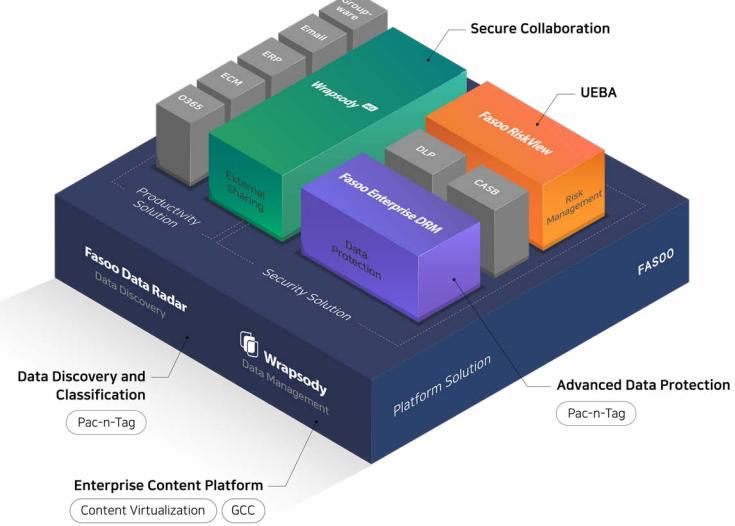
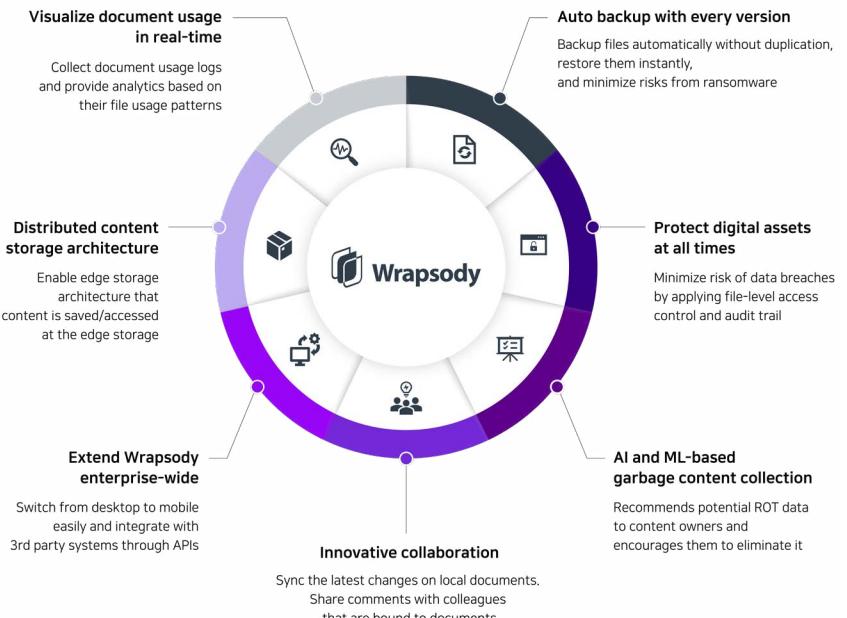
Empowering and securing a hybrid workplace is no longer a preference, it is a necessity for the future. Building and implementing information-centric content services strategies equates to success in information sharing, security, and management, and a must-have solution for organizations to embrace the change and drive growth in the post-pandemic era.

## Build Virtual Content Infrastructure and Implement Information-centric Content Services Strategies

Information is fuel to run a business, a source of business insights, and a driver of processes. The way organizations create, manage, disseminate, and exploit their enterprise content has changed in response to external market forces and internal business drivers.

Many organizations manage information using tools like email, content management systems, file servers, cloud storage, enterprise messaging, and social networks, and many others. All of these can be valuable, but they have limitations. Multiple versions of files proliferate throughout an organization, often without means of tracking them. Email messages are sent with file attachments that are also not tracked and sometimes not properly saved on employees' devices. Multiple people will revise documents in parallel, leading to conflicts and lost changes. The ability to search across multiple copies and versions of files is often limited, as is enterprise-wide file search in general. Standard tools rarely give organizations the ability to monitor how documents and document templates are used over time.

To reflect the changing market dynamics, Fasoo has introduced Wrapsody, a new approach to content management using VCI technology, to address these issues. Wrapsody is based on a file-centric approach: it links files with metadata to enable automated content synchronization and version control management beyond repositories, and to identify files wherever they reside rather than only being available within repositories that employees may use inconsistently.



# FASOO

## About Fasoo

Fasoo provides unstructured data security, privacy, and enterprise content platforms that protect, control, trace, analyze, and share critical business information securely to prevent a data breach and protect intellectual property, while enhancing productivity. Fasoo's continuous focus on customer innovation and creativity provides market-leading solutions to the challenges faced by organizations of all sizes and industries.

For more information visit

[www.fasoo.com](http://www.fasoo.com)





# Proactively Protecting Your Sensitive Information for Remote Workers

By Gimmel

The unprecedented COVID-19 pandemic has, almost overnight, forced many organizations to modify their business practices and transition to a remote workforce. Of course, the first focus during this transition is deploying the connectivity and infrastructure necessary to support your remote workers. Don't, however, lose sight of the fact that information scattered across a dispersed workforce can significantly raise the risk of a data breach or other security concerns.

At Gimmel, we regularly talk to IT, security, and privacy professionals across a broad portfolio of industries. As a result of those discussions, we've created the threat matrix shown below which outlines the areas of concern that we hear most often:



As a result of content being more decentralized, it is perhaps more important than ever to ensure that your company's sensitive and critical business information is secure even though your workforce is operating remotely. Fortunately, tools like Gimmel Discover can help your organization achieve the remediation goals outlined in the Insider Threat Matrix graphic.

The goal is to achieve full visibility into any Windows workstation that has an Internet connection. By silently using Microsoft SCCM – or a similar tool – your administrators can manage content being stored on each workstation.

## Users can limit the risk of insider threats by:

- **Creating specific folder hierarchies on each device.** This strategy can help keep project files organized among team members and aid in the disposition of documents once a project has been completed.
- **Discovering content on an employee's workstation by examining meta-data criteria such as file name, type, or age.** Users can also open files and search through their content to uncover items containing specific information such as keywords, phrases, or patterns (e.g., social security numbers, customer information, etc.).
- **Applying retention rules (i.e., move/delete) to locally stored content based on established records retention guidelines.** Additionally, users can facilitate a data owner remediation approach where targeted content is identified automatically then presented to the data owner on a report where they can review each item and indicate the proper disposition step for each item.
- **Locating and managing email content that may reside in local PST files on the device, even when the PST file is open in Microsoft Outlook.**

If you would like to see how Gimmel Discover can help you gain control over your remote workstation content, request a demo [HERE](#).



### About Gimmel LLC

Without proper management of your information, you could be exposing your organization to legal or regulatory risks. Gimmel helps you take control of your information by streamlining the discovery, migration, governance, and compliance of information without impacting your end users. Achieve information governance by ensuring information creates value instead of risks.

For more information visit

[www.gimmel.com](http://www.gimmel.com)



## Initiating and Driving Core Business Processes in Today's Hybrid Workplace

By Micro Strategies

*The shift to remote work has significantly impacted how organizations manage information. We sat down recently with Adam Storch, Vice President of Business Solutions, Micro Strategies, to discuss the effect advancing technology and the move to hybrid workplaces have had on information management.*

**How are businesses using artificial intelligence (AI) to automate the processing and categorization of incoming information in all forms as it enters the organization? Are there ways they can automatically extract the data and information that is necessary to initiate or drive core business processes?**

While the role of AI – extracting information about content – is the same across all scenarios, where it's used in the overall process varies.

We've found that it's critical to define success for your AI implementation before you get started. Depending on your content and how the extracted information will be used, your users may spend more time validating the extracted information than if they visually reviewed the content and tagged the content and/or process. The best ROI we've seen is when AI is part of the initial analysis of the content (intake).

AI can provide a great start for reviewing content. Identifying document sentiment, clauses in a contract, dates, amounts, and entities (people and organizations) can make the initial review of larger content files easier. This information can absolutely help trigger a process but may not provide enough information to select the appropriate process.

There is no doubt AI can add significant value. The key is to make sure your expectations are in line with reality.

## How has content ingestion changed in a work from home environment?

It's become more centralized and decentralized based on the origin of the content. People aren't receiving their work mail at home (letters, signed contracts, etc.). This has created a need for a more centralized approach to scanning the content sent to the office. Paper still exists and arrives daily. Someone goes through the mail, scans it, and delivers it to the original recipients (via email, workflow solutions, ECM/CCM drop zones with notifications, etc.). Mailroom automation is a hot topic again.

There's been an increase in decentralized ingestion by people receiving actionable content via email attachments or emails with links for downloading content. Remote employees have become more comfortable ensuring the content they receive is imported into the appropriate repository or business process solution. Before the pandemic, users were much less interested in being part of the ingestion process. They usually passed the content off to someone else to handle.

## Are you seeing explicit strategies and systems to encourage collaboration, especially across virtual workforces and organizational boundaries?

The number of companies requesting more robust collaboration strategies has increased dramatically over the last year and continues to rise.

When everyone shifted to working remotely, it seemed every client had a different idea of what was required for continued collaboration. The initial strategy involved putting files in the cloud. While this helped with file access, it didn't truly address collaboration.

The companies that created strategies around accomplishing business objectives, not just sharing files, saw productivity increases. These strategies included putting processes (automated and user-driven) around the folder and files that are created as well as accessed. More robust strategies included content intake, business process or workflow, and governance solutions.



### About Micro Strategies

Micro Strategies partners with organizations to optimize their business processes, provide insight into their information, and improve productivity. We provide solutions that integrate a client's business processes with their critical business applications so they can manage their information through its lifecycle, quickly access or share it, and easily monitor and report on activity.

For more information visit

[www.microstrat.com](http://www.microstrat.com)



# The Art of Estimating Automation Potential

## Understanding the Key Factors that Affect How Much Document Automation You Can Achieve

By Parascript

When the word “automation” is brought up in a conversation, most people think of something that is completely handed over to machines. And that scenario can be true if the tasks involve very straightforward, highly repetitive work with little variance. Think of processes like provisioning an email account for a new employee and you’ll get the idea.

When it comes to automation of document tasks, while it is relatively easy to convert paper into images or to make resulting images of documents searchable, it is quite another thing to take unstructured document-based information and comprehensibly convert it into highly reliable, structured, and usable data. All of a sudden, aspects of a project or organization’s requirements that appear to be very straightforward begin to take on more ambiguity when it comes to assessing just how much automation can be achieved.

The ability to set realistic plans doesn’t have anything to do with whether a given solution incorporates a rules-based approach or uses advanced deep learning neural networks. Both paths, with the proper configuration can achieve high levels of automation. It all comes down to understanding two aspects of a given project’s scope: the nature of tasks you wish to automate and the levels of automation available.

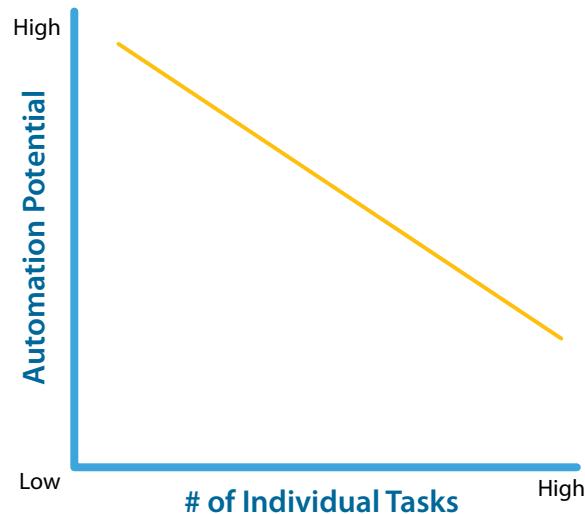
### Task Attributes

Many organizations, when considering implementing document automation fixate on the question of accuracy. Questions such as “what level of accuracy can your software provide?” are common. But that question is too narrow and doesn’t take into consideration the wide variety of tasks that can be involved. Anyone can easily state (truthfully) that a given solution can achieve 99% accuracy, but that information doesn’t reveal at all the actual amount of automation.

When it comes to understanding automation at the task level, are we talking document classification of single files, classification and separation of documents contained in a single file, data extraction of one field or multiple? Each

scenario affects the level of automation which ultimately impacts your resulting workflow and staffing impacts.

The more variance you have with a process, the greater the chance that automation will decline. A simple document classification project involving 10 document types has a higher probability of significant task automation over a project involving extraction of 100 fields on a health remittance document, for example. Automation estimates must look at each discrete task individually in order to understand automation potential and measurement of automation should also be at the task level.



The second factor to consider is the reliability of the data from a system. A question often not asked is “how reliable is your system when detecting errors?” The industry uses the concept of a confidence score applied to each

answer to divide data that is accurate vs. data that needs to be reviewed. The reality is that most organizations do not apply confidence scores correctly resulting in potentially high levels of task automation dragged down by 100% manual review. Without optimizing a system to use confidence scores, the ability to achieve any level of straight-through processing is impossible.

When approaching a document automation project, accuracy is only part of the equation. Equally important is understanding the nature of each individual task along with the reliability of the task results. Anything less and your project is at significant risk.





## About Parascript, LLC

Our software analyzes over 100 billion documents annually and automates key tasks for financial services, government agencies, and the healthcare industry. Our clients are our partners – Business Process Outsourcers (BPOs), service providers, Original Equipment Manufacturers (OEMs), and Value-Added Resellers (VARs) in the U.S. and across the world.

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# The Difference Between Intelligent Document Processing and RPA – Or Is There One?

By Pyramid Solutions

For many businesses, content and data capture tools are highly sought out, particularly in the banking and insurance sectors. With so many different types of documents required to operate and adhere to compliances, the need for capturing data accurately and quickly, especially unstructured data, is ever growing. As a result, businesses are looking at sophisticated data

capture solutions to achieve this. For a while, the biggest player was intelligent document processing (IDP), which used to be known as “capture.” However, now robotic process automation (RPA) is matching the features IDP tools offer and throwing their hat into the data capture ring.

## How RPA Is Matching IDP Technology

With businesses demanding more intelligent content capture, RPA vendors took note. Now, many RPA vendors have data capture capabilities that utilizes IDP components with optical character recognition (OCR) and natural language processing (NLP) technologies. In addition, RPA is making data capture “smarter” through AI and ML technology to understand and categorize structured and unstructured data better than ever.

Today, the lines between capture capabilities with RPA and IDP are being blurred and it's getting harder to differentiate the features that they are bringing to the table between RPA containing OCR or IDP technology and standalone IDP. Consequently, businesses are having difficulty deciding which technology is best for them.

## RPA or IDP: Which Is Right for My Business?

### 1. How many pieces of content are you ingesting?

For businesses that need to extract and process an extensive amount of content, IDP technology is ideal based on cost. Typically, RPA vendors are pricing their software by page processed whereas standalone IDP is a yearly payment.

## **2. Are you trying to get up and running as quickly as possible?**

If you're working with many different types of documents, known as domains, and need to get them extracted as quickly as possible, you should look to RPA. Within IDP and RPA, there are pretrained domains, which can process documents, such as invoices, pay stubs, and tax forms, quickly thanks to machine learning. IDP is limited to only a few pretrained domains, while RPA has an ever-growing list of pretrained domains that continues to grow over time.

## **3. Are you looking for more than just capture and extraction?**

If so, RPA is your tool since it's better for businesses looking to take their data extraction a step further whereas IDP extracts data and that's it. For example, let's say a loan application comes in for someone seeking a mortgage property. IDP can only extract information about property and mortgagee. RPA can take this further by figuring out the property's address and then gather more information about it such as whether it's in a flood zone.

## **4. Do your existing systems support REST APIs?**

For existing systems that do not support REST APIs, the majority of IDP technologies are off the table. This can be a headache if you're working with any homegrown systems for document management that may not have REST APIs in place. Here RPA would be your go to. Not only is it able to interact with REST APIs, but it's also able to mimic human interactions with a GUI in cases where no API is available.



### About Pyramid Solutions

Pyramid Solutions provides intelligent automation solutions to help organizations work as efficiently as possible. We strive to optimize how our clients work with information from when it enters an organization to the way it's analyzed to make insightful data-driven decisions.

For more information visit:

[www.pyramidsolutions.com](http://www.pyramidsolutions.com)



## Overcoming Information Overload in HR

By Scan-Optics

It's no secret that organizations today are swamped by information. According to AIIM, [organizations expect the amount of information they must manage to increase by 4.5x](#) in the next 18 months. Add to this the massive and immediate shift to remote working in 2020 and the impacts of information overload compound exponentially.

It's hard to avoid information overload nowadays. And the quantity and speed of that information coming at us is often more than we can handle. The impacts are felt in every aspect of doing business today; [two thirds of office workers say that the volume of data they must manage negatively affects their job.](#)

### Overload Loads Down HR Efficiency

Perhaps nowhere is information overload felt more acutely than in Human Resources. For example, when a new employee is hired the process involves a number of important documents. Tax forms, benefit enrollments, background checks, and employment contracts are common, but there are many others. Indeed, an employee file can grow to hundreds of pages. And despite the increasing digitization of business today, much of this information is on paper.

### New Approaches Win the War on Paper

There are new approaches and technology that give HR some much needed relief from the war on paper. One example comes from Connecticut Governor Ned Lamont, who recently provided an update on the [executive order he signed in 2019](#) directing state agencies to streamline their HR operations in an effort to reduce bureaucracy and implement efficiencies.

**Governor Lamont stated:** *"From digitizing hundreds of thousands of pages of files, to eliminating backlogs, to building new teams with specialized skills, this is a modern HR effort that supports each and every one of our dedicated state employees and an environment that gets work done."*

Josh Geballe, commissioner of the Department of Administration and the state's Chief Operating Officer further added: "This initiative is a great example of the opportunities we have in state government to improve the quality of the service we provide and use technology to help us become more cost-efficient."

## Digitization Saves Millions

At the heart of the effort is the digitization of over 100,000 paper files, totaling over 1 million pages. A study of Connecticut's state government in advance of an expected wave of retirements next year has identified as much as \$900 million in potential savings as a result.

## The Future of Work Is Now

The improvements came at a good time. An added benefit has been centralizing the state's Human Resources team during the ongoing COVID-19 pandemic. This has bolstered the ability of state agencies to work together more quickly. "Our HR team has been a critical part of the pandemic response, ensuring that agencies can quickly work together to address new challenges," added Geballe.

## Moving Forward

What can you do? Scan-Optics helped the State of Connecticut with this important initiative. We enabled the state to take data that was unstructured; then digitized, organized, and optimized the files so they were searchable and easily retrieved through their content management system. To learn more about how we help organizations globally use Intelligent Data Processing solutions to reduce the burden of paper, overcome information overload, and gain a competitive edge visit [scanoptics.com](http://scanoptics.com) or see to how it works [in this video](#).



### About Scan-Optics, LLC

Scan-Optics is a leading global provider of cloud based, AI, Intelligent Data Management solutions, professional services, business process management, and support services to B2B, Government, and Higher Education. Our pioneering technology has been shaping the industry by using data technologies paired with cognitive and AI advances to bring you easy. forward™, an Intelligent Data Management solution that captures data securely and accurately!

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