“Enterprise Content Management, The Value Proposition”

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Trends and Business Drivers

- Costs
- Customer
- Continuity (Risks)
- Compliance (Governance)
Costs

• Do more with less resources
• Improving efficiencies
• Reducing physical storage requirements
• Increasing productivity
• Increasing performance
Customer

- Managing information more efficiently
- Faster business transactions
- Enhanced customer service
- Competitive advantage
Risk and Governance
(Compliance & Continuity)

• Finding and retrieving information on demand to demonstrate compliance with regulatory guidelines
• Controlling access and ensuring confidentiality
• Ensuring business continuity 24x7x365
Risk and Governance

U.S. Guidelines
- Government Paper Elimination Act
- HIPAA
- Gramm-Leich-Bliley
- Sarbanes-Oxley
- Bank Secrecy Act
- SEC 17a3-4
- Check 21

- The Health Care Quality and Modernization, Cost Reduction and Quality Improvement Act
Risk and Governance

• Confidentiality and Continuity:
  – Dept. of Labor (OSHA) Privacy Act of 1974
  – The Family Educational Rights and Privacy Act
  – PAS 56
  – Basel II

• Records Management:
  – ISO 15489-1 & 2
  – FDA 21 CFR Part II
  – DoD 5015.2-STD/DITSCAP
The Solution

- Enterprise Content Management, including document imaging, the capture component, as it provides real world solutions that enable organizations to cut costs, improve data accessibility, control access, produce a more accurate audit trail and to ensure the secure retention and destruction of an organization’s information asset.
Enterprise Content Management

“The strategies, methods and tools used to capture, manage, store, preserve and deliver content and documents related to key organizational processes.”

AIIM International, 2006
ECM – is and is …not

- ECM is not…
  - a single technology
  - a black box
  - a miracle cure
  - easy

- ECM is…
  - about business & organizational processes
  - not just technology
  - complicated
ECM – E = Enterprise

- Think like an environmentalist
- Think globally, act locally
- Think strategically, implement tactically
ECM – C = Content

- All content, not just text documents, not just emails without attachments
- How widely do you need to search & retrieve
- Users inside & outside the organization
ECM – M = Management

- Not just collecting & holding content, but actively managing it
Managing All Information

• Graphics
• Electronic
• Sound
• Video
• Web Content
• Email
• FAX
• Paper
Software

- Archive and Retrieval
- Production Capture
- Distributed Capture
- OCR
- ICR/OMR/Barcode
- Forms Processing
- IDR
- Document Distribution
- Key from Image

- Enterprise Search
- File to Image
- eMail Management
- Business Process Management (Workflow)
- Image Enable
- Enterprise Report Mgmt.
- Information Lifecycle Management
Hardware

- Network Infrastructure
- Scanner(s)
- Image Processing
- Image Enhancement
- Collaboration Tools
- Security

- Storage:
  - Magneto Optical
  - WORM
  - RAID
  - CDs
  - NAS
  - SAN
Aiding with Information Management

- Convert Paper to Electronic Format
- OCR/ICR/Barcode
- Metadata
- Full Text Search and Retrieval
- Author
- Check-In/Out Privileges
- Version Control
- Audit Trail
- Designated privacy administrator Access Control
- Remote Access
- Simultaneous Access
- BPM (Workflow)
- Redundant Off Site Storage
ECM Applications

• Horizontal Applications:
  – Disaster recovery
  – Customer records management
  – Human resource records management
  – Processing forms
  – Document distribution
  – Document publication
  – Automating business processes
ECM Applications

- **Education:**
  - Student Records

- **HealthCare:**
  - Patient Records
  - Claim Processing
  - Order Entry (Lab, etc.)
  - Clinical Data Repositories

- **Transportation:**
  - Proof of Delivery

- **Legal:**
  - Client Records
  - Case Reports

- **Government:**
  - Historical Records
  - Parking Tickets
  - Compliance Documents
  - Police Department Records
ECM Applications

- Insurance:
  - Applications
  - Claims
  - Damage Inspections
- Hospitality:
  - Charge Authorizations
  - Reservations
- Retail/Manufacturing:
  - Contracts
  - Buyer Files
  - Sales Agreements
  - ISO Procedures
- Banking/Financial Services:
  - Proof of Deposit
  - Check Truncation
  - Signature Verification
  - New Account ID
  - Transaction Processing
  - Safe Deposit Contracts
  - Wire Transfer
  - Documentation
Considerations

• Backfile versus day forward implementation
• Deployment
• Departmental vs. Enterprise
• Internal vs. Outsourcing
• File Formats
• Shred vs. Off-Site
Return on Investment

• Cut costs
• Streamline business operations
• Improved customer service
• Ensure regulatory compliance
• Guarantee business continuity
Property Management Plus, Inc.

Company Overview:
– San Jose, CA
– 4 Person Property Mgmt. & Real Estate Co.
– Serves clientele in greater SF Bay & international clientele in Australia, China, Israel, Japan, Philippines, & UK

• Business Problem:
– Highly paper intensive (agreements, photos, inspection reports, disclosures, etc.)
– For regulatory purposes, physical file must be archived for up to 4 yrs.
– Receive an avg. of 70 calls per day requiring immediate access to files
Property Management Plus, Inc.

- Relying on traditional information sharing (FAX, Postal & Courier Services)

  - Solution:
    - ScanSnap to digitize files to PDF for archiving and sharing via email

  - ROI:
    - Eliminate costs of faxing (1 doc. to Philippines $27 / Korea $36) (Saved thousands)
    - Eliminated courier minimum 7 day staggering value-add
    - PDF provide for vast ability to collaborate
    - Execute contracts faster resulting in company growth
Meritage Mortgage

- **Company Overview:**
  - A sub prime mortgage lender
  - Offices in Portland, OR and Jacksonville, FL
- **Business Problem:**
  - Sub prime-lending environment is more labor intensive due to stringent requirements
  - Rising costs associated with paper-intensive mortgage process
  - Lost documents
- **Solution:**
  - iDatix Corporation
    - iSynergy’s Mortgage (end-to-end integrated solution to manage mortgage processing business application)
Meritage Mortgage

– iDatix Corporation
  • iSynergy’s iScan (capture, auto-index, and route for processing, underwriting, approving and shipping)
  – 16 Fujitsu fi-5650 Color duplex workgroup scanners
  • Benefits:
    – Substantial reduction in processing time
    – Process improvements (auto. BPM provides ability to route electronically dramatically reducing time to approve or deny)
    – Eliminated lost documents
    – Shared access across enterprise
Meritage Mortgage

- **ROI:**
  - Cost reductions from minimizing copier, fax and paper use
  - Reduced shipping costs
  - Resulted in anticipated 12 month ROI
  - Productivity gains and increase in the quality of processes will be net gains
U.S. Army Recruiting Command
(As reported by Tom von Gunden, Integrated Solutions)

• Overview:
  – Fort Knox, KY
  – Business efficiency in Gov. or Military?
  – Business Problem:
    – USAREC sought to comply with Gov. Paperwork Elimination Act
    – GPEA effective Oct. ‘2003 encouraging federal agencies to accept electronic images
    – 250,000 applicants each yr. resulting in 100,000 recruits
    – Each applicant eligibility docs. (birth certificates, SS cards, transcripts, medical, etc.)
    – Est. 25M pgs. per yr. being processed by 760 Army induction counselors
U.S. Army Recruiting Command
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- Solution:
  - Electronic Records Mgmt.
  - Custom Application to input scanned images into ERM
  - Fujitsu fi-4120C departmental scanners (dist. To 65 MEPS locations)

ROI:
- Streamlined recruit induction process
- Eliminated paper-based records
- Reduced processing time for 100 pgs. of documents for each recruit to less than 5 minutes
- Cost saving of $500,000 per year for erroneous enlistments
Universal Forest Products, Inc.

• Company Overview:
  – Grand Rapid, MI
  – Fortune 1000 Manufacturer & Distributor of Wood & Wood Alternatives

• Business Problem:
  – Vast Co. growth increasing need to store massive amounts of documents
  – Storing docs. consuming office space & they were paying for additional storage
  – Legal dept. needed a way to easily retrieve docs. that might be relevant to a case
Universal Forest Products, Inc.

- **Solution:**
  - Integrated Doc. Mgmt. & BPM Solution
  - Forms Processing
  - Fujitsu fi-4120C Workgroup & fi-4530C Departmental scanners

- **Benefits:**
  - Reduce time to access documents in legal from weeks to hours
  - Quickly reached minimum ROI to prove concept
Universal Forest Products, Inc.

- Addressed Other Business Problem:
  - Payroll dept. (4 locations) needed to manage docs. For 9,000 employees in 100 locations
  - Acct. Payables needed access to files at 71 sites (previously FAX)
  - Environmental and Safety Dept. mailing material safety data sheets to 100 locations

- Benefits:
  - Payroll and Acct. Payable had faster access to docs. & eliminated costs associated with faxing
  - Env. & Safety now stores a single copy of safety data sheet at corporate & 100 branches access via internet
Universal Forest Products, Inc.

ROI:

- Reduced risk & ensure compliance
- Significantly reduce labor and customer service requirements
- Copying and faxing costs slashed
- Processes improved
- Additional storage no longer required
- Eliminated planned purchases to accommodate growth
Cobb County Superior Court

Business Problem:

– 46 days to process deeds from time presented to recorded
– 20 employees working 66 hours to maintain 46 day turn around
– Running out of office space & facing building a new 10 million dollar storage facility

• Implementation Objectives:
  – Reduce processing time
  – Reduce employee hours and eliminate overtime
  – Give people remote access to government documents
  – Eliminate building investment
Cobb County Superior Court

• Solution:
  – Archive and Retrieval Software
  – fi-4120 series scanners

• ROI:
  – Reduced turn around from 46 days to 3 hours
  – Eliminated employee overtime
  – Eliminated need for new $10M storage facility
Fujitsu Scanner Line-up

100+ PPM

90 PPM

60 PPM

40 PPM

25 PPM

15 PPM

12 PPM

$1,000 $2,000 $4,000 $5,000 $9,000 $18,000 $21,000 $30,000

fi-5900C $24,995
New!

fi-4990C $25,995
M4099D $20,995

fi-4860C $16,995

fi-5750C $7,995

fi-5650C $5,995

fi-5530C $3,995

fi-5120C $1,195

fi-5220C $1,995
New!

fi-5015C $695

fi-5110C $895

fi-60F A6 Flatbed Scanner $395
New!

ScanSnap $495

ScanSnap fi-5110EOXM $495

ScanSnap fi-60F A6 Flatbed Scanner $395
New!

fi-4340C $4,995

fi-5530C $3,995
Why?  ECM Strategy

What?  ECM Concepts

How?  ECM Process

Use?  ECM Case

Call to Action – AIIM ECM Training Program
More Information

• Case Studies and Product Information:
  – Fujitsu at www.fcpa.fujitsu.com
• Industry Associations:
  – AIIM at www.aiim.org
    • Annual trade show
    • Local chapters
    • Certifications (ECM and ERM)
    • MarketPlace
• Periodicals (DIR; eDoc; DOC1; & Business Solutions)
• Channel Programs (Distributors)