

**Scanning and Capture Technologies 2007**

**Process Integration and ROI Enhancement**



**Breakout of Data by Organizational Role of Participant**

**AIIM Industry Watch Survey**

Prepared by: John F. Mancini, President, AIIM



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AIIM - The ECM Association  
1100 Wayne Avenue, Suite 1100  
Silver Spring, MD 20910  
301-587-8202  
[www.aiim.org](http://www.aiim.org)

## ABOUT AIIM – The Enterprise Content Management Association

AIIM—[www.aiim.org](http://www.aiim.org)



AIIM is the international authority on Enterprise Content Management (ECM), the technologies used to capture, manage, store, preserve, and deliver content and documents related to organizational processes. ECM tools and technologies provide solutions to help users with the four C's of business: Continuity, Collaboration, Compliance, and Costs.

For over 60 years, AIIM has been the leading non-profit organization focused on helping users understand the challenges associated with managing documents, content, records, and business processes. Today, AIIM is international in scope, independent, implementation-focused, and, as the representative of the entire ECM industry - including users, suppliers, and the channel - acts as the industry's intermediary.

As a neutral and unbiased source of information, AIIM serves the needs of its members and the industry by providing educational opportunities, professional development, reference and knowledge resources, networking events, and industry advocacy.

AIIM provides:

**Market Education** - AIIM provides unbiased information through its ECM Solutions Seminars (held throughout the U.S. and Canada); the Managing Information and Documents Road Show (held throughout the UK); Infolreland (held in Dublin); AIIM Webinars; AIIM E-DOC Magazine and our online Solution Centers for financial services, healthcare, and state & local government.

**Professional Development** – AIIM's industry education road map offers business and government professionals a variety of training opportunities. Our ECM & ERM Certificate Programs provide instruction on the Why?, What?, and How? of Enterprise Content Management and Electronic Records Management via Web-based and/or classroom courses.

**Peer Networking** - Through chapters, networking groups, programs, partnerships, and the Web, AIIM creates opportunities that allow, users, suppliers, consultants, and the channel to engage and connect with one another.

**Industry Advocacy** - As an ANSI (American National Standards Institute) accredited standards development organization, AIIM acts as the voice of the ECM industry in key standards organizations, with the media, and with government decision-makers. Our Industry Watch research reports provide intelligent information about user trends and perceptions.

## THE AUTHOR



John Mancini has been President of AIIM since May 1996. Working together with the AIIM Board, staff, and thousands of volunteers around the world, his goal is to help AIIM connect the users and suppliers of enterprise content management (ECM) technologies and services. Prior to joining AIIM, John spent 11 years in various positions at the American Electronics Association in Washington, D.C., most recently as Executive Vice President and Chief Operating Officer. John holds a Bachelor's degree from the College of William and Mary and a Master's degree from Princeton University.

John comments frequently on industry trends and statistics through his blog, which can be found at [www.aiim.typepad.com](http://www.aiim.typepad.com). (Note: Free e-mail subscriptions are also available at the same URL.)

## About This Report

This document was created through the collaborative efforts of readers of the AIIM Industry Watch blog ([www.aiim.typepad.com](http://www.aiim.typepad.com)). This was the first time we have used a wiki to create this report. AIIM ([www.aiim.org](http://www.aiim.org)) gratefully acknowledges the contributions of the following individuals who contributed to this report, who are listed in order of their registration on the wiki. Of course, final responsibility for the contents of this report rests with AIIM.

<b>Name</b>	<b>Organization</b>
John Mancini	AIIM
Harold C. Heard Jr.	Citigroup
Lawrence Wischerth	TIAA-CREF
TK Train	Gambro BCT
Jesse Wilkins	J Wilkins & Associates
Johan Rambags	UCAD
Corey Smith	Fisher's Document Systems
Leon van Oosterom	van Buuren DMS
Michele Melichar	Lockheed Martin
Daniel Feurstein	Adpunctum Europe Ltd.
Joe Kelly	Unisys Corporation




Upcoming AIIM reports will also seek to be more collaborative in nature and leverage the knowledge of those whom we serve. For past AIIM Industry Watch reports, go to [www.aiim.org/industrywatch](http://www.aiim.org/industrywatch). The next report that AIIM will publish will be our multi-country "State of the Industry" report, which will be released at the AIIM OnDemand Conference and Expo in mid-April.

## Key Findings

















Overall, the survey findings reflect a set of technologies that are stable and in widespread use. They also suggest that scanning and capture are by no means “mature” industries. There still exist enormous opportunities relative to recognition, scanning automation, and process integration.

- It is clear from the survey results that while risk reduction and compliance arguments relative to scanning and capture are important to end users, end users clearly see these technologies through the prism of efficiency and productivity.
- If efficiency and productivity are the key business drivers, then it should come as no real surprise that “justifying the investment” is a key obstacle that must be overcome in selling capture technologies. It is important as these technologies (and the broader document and records space) become more “mainstream” that these arguments be made in terms that are specific to the actual experience of the end user.
- Two “change” obstacles are also clearly important to end users (“change management” and “integration of new technologies”). Interestingly, as users move along the implementation curve (i.e., heavy users rather than ad hoc) they become even more aware of the change management obstacles. Many of these problems are the result of lack of training and education. This “training gap” will get more acute as document and records technologies spread to a larger base within organizations.
- While records managers are important in influencing capture decisions, as is the case with other document and content technologies, they tend to not be the final authority. They appear to have the highest purchasing influence within mid-sized organizations.
- Clearly, on-line information resources (search engines, AIIM web site, company web sites, and webinars) are extremely important to end users and prospective end users as they consider scanning and capture technologies. In addition, magazines (such as AIIM E-DOC Magazine) continue to be an important information resource, even as many in the B2B publishing business experience challenges with the traditional advertising base for magazines.
- The ROI experience of end users mirrors the impressive results reported in 2006. Even among a sample with a wide range of capture experiences and sophistication (ranging from organizations with an ad hoc interest in capture to those that integrate scanning and capture into key processes) only 11% would evaluate the ROI of their capture and scanning implementations as worse than other IT investments.
- Organizations are clearly seeking to leverage the investment they have made in multi-function devices (MFDs) by extending their use into scanning. Two-thirds of those responding see a role for MFDs in their capture plans. Most of the use is currently for static, ad-hoc scanning applications, although this appears to be changing.
- Scanning and capture are often thought of as “mature” technologies. The data on use of recognition technologies (only 53% of those who indicate they are active users of scanning and capture say they also use ANY recognition technology) suggests that while scanning and capture are “stable” technologies, there are by no means “mature” in their deployment.
- The survey suggests that most end users are still at a relatively early stage in integrating capture with process (i.e., many of those in the sample are still at a relatively immature stage in their full utilization of these technologies). Even in processes that many in the industry think of as relatively mature (finance, governance, HR), the percentage of those that actually use scanning and capture in these processes is typically less than 50%.
- The results suggest that there is still much opportunity to enhance and leverage existing capture investments by pushing capture into processes. The interplay between process integration and ROI (see section on ROI) suggests that as users fully tap into the potential of capture and scanning to change processes, their satisfaction grows.


Approximately how many employees are there in your ORGANIZATION as a whole?

1-100		103	66%
101-1,000		20	13%
over 1,000		32	21%
<b>Total</b>		155	100%





In which industry sector does your organization operate?

Banking & Finance		21	13%
Insurance		3	2%
Chemicals & Pharmaceuticals		0	0%
Construction & Building		2	1%
Consultant		31	20%
Education		3	2%
Government & Public Services – Federal Level		6	4%
Government & Public Services – Provincial, State, or Local Level		5	3%
Healthcare		9	6%
Information Technology – NOT in the ECM industry		9	6%
Information Technology – a provider of document or content-related products and services		0	0%
Legal		4	3%
Manufacturing & Engineering		3	2%
Retail		3	2%
Service Bureau or Service Company		41	26%
Telecommunications & Media		1	1%
Transportation & Distribution		2	1%
Utilities, Oil & Gas		3	2%















Pick the choice that best describes your role within your organization:

Line-of-business or process owner (president, CEO, senior executive in charge of particular non-IT function)		156	100%
Records or document management practitioner		0	0%
IT manager or executive		0	0%
Other, Please Specify		0	0%
<b>Total</b>		<b>156</b>	<b>100%</b>

In which country are you located?









United States		119	77%
Canada		5	3%
United Kingdom		4	3%
Other, Please Specify		26	17%
<b>Total</b>		<b>154</b>	<b>100%</b>

Which of the following do you use to gather information about scanning and capture technologies (check as many as apply)?

Search engines (e.g., Google, Yahoo)		98	63%
Word of mouth		78	50%
AIIM Show		61	39%
Road shows and events sponsored by individual companies or groups of companies		41	26%
Webinars		68	44%
Industry experts/analysts/consultants (e.g., Gartner, Forrester, etc.)		70	45%
AIIM road shows (US and UK)		25	16%
Events and conferences focused on your specific industry		75	48%
Magazines		102	65%
Company web sites		96	62%
AIIM web site		71	46%
Podcasts		5	3%
Blogs		16	10%
Other, Please Specify		8	5%








Think about the reasons why you might implement scanning and capture technologies in your organization.

Please check the TWO that are the MOST important (please check only TWO).







Compliance		25	17%
Leadership, competitive advantage		19	13%
Improve efficiency and productivity		101	67%
Risk management/Business continuity		29	19%
Better customer service		36	24%
Reduce costs		42	28%
Faster turnaround, improved response		39	26%
Increased profits, better performance		31	21%

Think about the obstacles or potential obstacles in your organization to implementing capture or scanning technologies.

Please check off the TWO most important obstacles in your organization (please check only TWO).

Justifying the investment, board commitment		58	39%
Getting employee commitment		33	22%
Planning/Managing implementation, change management		52	35%
Understanding/Specifying requirements		34	23%
Selecting products/Suppliers		20	13%
Content control, data migration, and classification		47	31%
Integration of new technologies		55	37%

Who has the major responsibility within your organization for making purchase decisions on scanning and capture technologies? (Note: not necessarily who signs the final approval, but who is doing the real work of recommending what to buy.)

President or CEO		81	52%
Records or document management professional		21	13%
IT professional		19	12%
CFO		4	3%
Head of department		24	15%
Other, Please Specify		7	4%
<b>Total</b>		156	100%
















Does your company utilize ANY of the following scanning or capture technologies?

- Workgroup scanners (10-25 pages per minute)
- Departmental scanners (25-40 pages per minute)
- Low volume scanners (40-60 pages per minute)
- Mid-volume scanners (60-90 pages per minute)
- High-volume scanners (>90 pages per minute)
- ID card scanners
- Document capture software
- Forms processing software
- Outsourced scanning/capture services
- Networked-attached multi-function peripheral device (i.e., a printer or copier that is also used for scanning)
- Network scanner
- Fax server software (to capture faxed documents)
- OCR software (to convert images to text)
- Software to convert documents INTO PDF
- Software to convert documents FROM PDF into other formats

**If you use one or more of the technologies listed above, check YES. Otherwise, please check NO.**



Yes		146	94%
No		10	6%
<b>Total</b>		156	100%

Please look through this list of scanning or capture technologies and check off those that are currently used in your organization (check ALL that apply):





Workgroup scanners (10-25 pages per minute)		63	45%
Departmental scanners (25-40 pages per minute)		37	26%
Low volume scanners (40-60 pages per minute)		48	34%
Mid-volume scanners (60-90 pages per minute)		49	35%
High-volume scanners (>90 pages per minute)		39	28%
ID card scanners		11	8%
Document capture software		96	68%
Forms processing software		50	35%
Outsourced scanning/capture services		27	19%
Networked-attached multi-function peripheral device (i.e., a printer or copier that is also used for scanning)		52	37%
Network scanner		24	17%
Fax server software (to capture faxed documents)		34	24%
OCR software (to convert images to text)		94	67%
Software to convert documents INTO PDF		107	76%
Software to convert documents FROM PDF into other formats		58	41%

Please think specifically about how you use Network-attached multi-function peripheral devices (i.e., printers or copiers, typically in a workroom, that can also used for scanning).



Do you use one or more of these devices in your organization for SCANNING as well as PRINTING and COPYING?

Yes		79	55%
No		64	45%
<b>Total</b>		143	100%











How do you think your usage of multifunction devices for SCANNING will change in 2007? The amount of scanning on this type of device...

Will increase a lot		16	22%
Will increase		37	50%
Will stay the same		15	20%
Will decrease		6	8%
Will decrease a lot		0	0%
<b>Total</b>		<b>74</b>	<b>100%</b>
















Which statement best describes how your organization views multifunction devices used for SCANNING?

As a replacement for dedicated scanners.		18	24%
We use multifunction devices for some capture jobs and dedicated document scanners for others.		56	76%
<b>Total</b>		<b>74</b>	<b>100%</b>

What do you do with documents that are SCANNED using a multifunction device? (check as many as apply)

We e-mail them.		33	45%
We scan into a folder on the network		41	55%
We send them into an Enterprise Content Management system		18	24%
We send them into a Workflow system		22	30%
We send them into an Archiving/Records management system		26	35%
We send them into an ERP (Enterprise Resource Planning) system		2	3%
We send them into an Accounting system		6	8%
We send them into a CRM (Customer Relationship Management) system		6	8%
We send them into an Industry-specific application (e.g., mortgage origination)		8	11%
Other, please specify		3	4%

Please indicate if your spending levels are likely to increase for any of the following. CHECK OFF ANY AREAS IN WHICH AN INCREASE IS ANTICIPATED; YOU MAY CHECK AS MANY AS YOU LIKE.

Workgroup scanners (10-25 pages per minute)		11	11%
Departmental scanners (25-40 pages per minute)		17	17%
Low volume scanners (40-60 pages per minute)		13	13%
Mid-volume scanners (60-90 pages per minute)		21	20%
High-volume scanners (>90 pages per minute)		31	30%
ID card scanners		3	3%
Document capture software		56	54%
Forms processing software		38	37%
Outsourced scanning/capture services		17	17%
Networked-attached multi-function peripheral device (i.e., a printer or copier that is also used for scanning)		14	14%
Network scanner		13	13%
Fax server software (to capture faxed documents)		15	15%
OCR software (to convert images to text)		46	45%
Software to convert documents INTO PDF		25	24%
Software to convert documents FROM PDF into other formats		15	15%

How would you evaluate your satisfaction with each of the following aspects of the capture process in your organization?

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.	completely satisfied	partially satisfied	partially unsatisfied	completely unsatisfied	N/A or Don't know
Document Preparation -- Sorting documents, removing staples, preparing batches, etc	34 29%	44 38%	22 19%	7 6%	9 8%
Scanning -- The actual converting paper documents into electronic files, typically PDF or Group 4 TIFF images	36 31%	61 53%	10 9%	6 5%	3 3%
Recognition -- Automatically extracting data (from a form)	15 13%	31 27%	34 30%	18 16%	16 14%
Indexing -- Assigning index keywords to all documents so that they can be retrieved later	23 20%	37 32%	30 26%	15 13%	10 9%
Data Validation-- Validating the results of automated recognition performed on a form	18 16%	30 26%	24 21%	16 14%	28 24%
Quality Control and Rescanning-- Examining document to make sure they are scanned correctly and sending badly scanned documents back to be rescanned	20 17%	47 41%	30 26%	7 6%	12 10%
Document Release-- Exporting images to long term storage and data to a database or back end workflow or content management system	25 22%	43 37%	24 21%	11 9%	13 11%

Do you use ANY recognition technologies in your organization (i.e., technologies to exact data from images)?

Yes		84	67%
No		42	33%
<b>Total</b>		126	100%

Do you use OCR (Optical Character Recognition) -- to recognize machine printed characters from scanned documents?

Yes		76	95%
No		4	5%
<b>Total</b>		80	100%


Do you use ICR (Intelligent Character Recognition) -- to recognize hand printed characters?

Yes		28	35%
No		52	65%
<b>Total</b>		80	100%

Do you use OMR (Optical Mark Recognition) -- to recognize check boxes, radio buttons, bubbles, etc.?










Yes		24	30%
No		56	70%
<b>Total</b>		80	100%

Do you use bar code recognition -- to extract data from pre-printed bar codes?

Yes		46	58%
No		34	42%
<b>Total</b>		80	100%

Please think about what happens to documents once they are scanned.




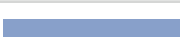

To which specific APPLICATIONS do you send captured documents? (check as many as apply)

NONE...We don't scan into applications		28	25%
Enterprise Content Management system		41	36%
Workflow system		34	30%
Archiving/Records management		51	45%
ERP (Enterprise Resource Planning) system		4	4%
Accounting system		18	16%
CRM (Customer Relationship Management) system		12	11%
Industry-specific application (e.g., mortgage origination)		16	14%
Other, please specify		9	8%





Please think through the following generic business applications, and indicate whether scanning or capture technologies are used in these processes (note: the processes listed in each group are for illustration and not intended as a comprehensive list):

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.	We CURRENTLY use scanning in this process	We PLAN TO use scanning in this process	We DO NOT use or plan to use scanning in this process	Don't know
Finance (e.g. invoice processing, order processing, cash receipts, expense accounts)	66 59%	16 14%	22 20%	7 6%
Sales (e.g., order entry, contracts, lead tracking, forecasting, proposals)	33 31%	23 21%	40 37%	11 10%
Human Resources (e.g., applications, resumes/CVs, benefits forms, healthcare forms)	41 38%	26 24%	31 29%	9 8%
Customer Service (e.g., correspondence, new accounts, service requests, warranties)	47 44%	27 25%	24 22%	9 8%
Corporate (e.g., correspondence, litigation, contracts)	63 57%	22 20%	17 15%	8 7%
Marketing (e.g., leads & prospects, customer information, competitive data, surveys)	34 32%	23 21%	36 34%	14 13%
Mail Processing (e.g., mail that is opened and distributed from a central location)	22 21%	22 21%	47 45%	14 13%

Think about the Return on Investment (ROI) of your organization's scanning and capture implementation(s). Please select the statement that best summarizes your organization's experience with capture and scanning technologies COMPARED WITH OTHER SIGNIFICANT TECHNOLOGY INVESTMENTS.

Much worse ROI than other IT investments		5	5%
Worse ROI than other IT investments		9	8%
About the same ROI as other IT investments		48	44%
Better ROI than other IT investments		32	30%
Much better ROI than other IT investments		14	13%
<b>Total</b>		108	100%


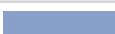


What kind of an impact does SOA (Service Oriented Architecture) have on your capture and scanning purchase decisions?

A major impact		15	13%
A modest impact		14	12%
Some impact		21	19%
No impact at all		25	22%
I have no idea what you are talking about		37	33%
<b>Total</b>		112	100%

Ideally, how would you prefer to purchase capture and scanning technologies?




Direct from manufacturer		40	35%
From a local reseller		33	29%
From the internet		8	7%
From office equipment dealers		3	3%
Doesn't matter		31	27%
<b>Total</b>		115	100%

In US dollars, what do you estimate your total spending on document capture and scanning to be during the past 12 months?


















<\$100K		70	64%
\$100K-\$500K		21	19%
\$500K--\$1 million		8	7%
> \$1 million		11	10%
<b>Total</b>		110	100%

## Industry Watch - Document and Records Types

Approximately how many employees are there in your ORGANIZATION as a whole?





1-100		47	10%
101-1,000		140	31%
over 1,000		264	59%
<b>Total</b>		451	100%

In which industry sector does your organization operate?





Banking & Finance		52	12%
Insurance		37	8%
Chemicals & Pharmaceuticals		16	4%
Construction & Building		6	1%
Consultant		17	4%
Education		22	5%
Government & Public Services – Federal Level		34	8%
Government & Public Services – Provincial, State, or Local Level		75	17%
Healthcare		14	3%
Information Technology – NOT in the ECM industry		3	1%
Information Technology – a provider of document or content-related products and services		0	0%
Legal		10	2%
Manufacturing & Engineering		33	7%
Retail		4	1%
Service Bureau or Service Company		11	2%
Telecommunications & Media		13	3%
Transportation & Distribution		9	2%
Utilities, Oil & Gas		53	12%

## Industry Watch - Document and Records Types















Pick the choice that best describes your role within your organization:

Line-of-business or process owner (president, CEO, senior executive in charge of particular non-IT function)		0	0%
Records or document management practitioner		451	100%
IT manager or executive		0	0%
Other, Please Specify		0	0%
<b>Total</b>		451	100%

In which country are you located?

United States		328	73%
Canada		45	10%
United Kingdom		16	4%
Other, Please Specify		59	13%
<b>Total</b>		448	100%









Which of the following do you use to gather information about scanning and capture technologies (check as many as apply)?

Search engines (e.g., Google, Yahoo)		247	55%
Word of mouth		216	48%
AIIM Show		127	28%
Road shows and events sponsored by individual companies or groups of companies		141	31%
Webinars		257	57%
Industry experts/analysts/consultants (e.g., Gartner, Forrester, etc.)		187	42%
AIIM road shows (US and UK)		83	18%
Events and conferences focused on your specific industry		246	55%
Magazines		299	67%
Company web sites		232	52%
AIIM web site		287	64%
Podcasts		22	5%
Blogs		30	7%
Other, Please Specify		47	10%

## Industry Watch - Document and Records Types








Think about the reasons why you might implement scanning and capture technologies in your organization.

Please check the TWO that are the MOST important (please check only TWO).

Compliance		132	29%
Leadership, competitive advantage		26	6%
Improve efficiency and productivity		329	73%
Risk management/Business continuity		150	33%
Better customer service		143	32%
Reduce costs		95	21%
Faster turnaround, improved response		114	25%
Increased profits, better performance		33	7%







Think about the obstacles or potential obstacles in your organization to implementing capture or scanning technologies.

Please check off the TWO most important obstacles in your organization (please check only TWO).

Justifying the investment, board commitment		175	39%
Getting employee commitment		134	30%
Planning/Managing implementation, change management		183	41%
Understanding/Specifying requirements		96	22%
Selecting products/Suppliers		40	9%
Content control, data migration, and classification		138	31%
Integration of new technologies		144	32%

## Industry Watch - Document and Records Types

Who has the major responsibility within your organization for making purchase decisions on scanning and capture technologies? (Note: not necessarily who signs the final approval, but who is doing the real work of recommending what to buy.)

President or CEO		26	6%
Records or document management professional		164	37%
IT professional		128	29%
CFO		13	3%
Head of department		83	19%
Other, Please Specify		34	8%
<b>Total</b>		448	100%

Does your company utilize ANY of the following scanning or capture technologies?






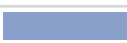









- Workgroup scanners (10-25 pages per minute)
- Departmental scanners (25-40 pages per minute)
- Low volume scanners (40-60 pages per minute)
- Mid-volume scanners (60-90 pages per minute)
- High-volume scanners (>90 pages per minute)
- ID card scanners
- Document capture software
- Forms processing software
- Outsourced scanning/capture services
- Networked-attached multi-function peripheral device (i.e., a printer or copier that is also used for scanning)
- Network scanner
- Fax server software (to capture faxed documents)
- OCR software (to convert images to text)
- Software to convert documents INTO PDF
- Software to convert documents FROM PDF into other formats

**If you use one or more of the technologies listed above, check YES. Otherwise, please check NO.**

Yes		433	96%
No		18	4%
<b>Total</b>		451	100%

## Industry Watch - Document and Records Types

Please look through this list of scanning or capture technologies and check off those that are currently used in your organization (check ALL that apply):

Workgroup scanners (10-25 pages per minute)		158	38%
Departmental scanners (25-40 pages per minute)		171	41%
Low volume scanners (40-60 pages per minute)		144	34%
Mid-volume scanners (60-90 pages per minute)		159	38%
High-volume scanners (>90 pages per minute)		153	36%
ID card scanners		90	21%
Document capture software		295	70%
Forms processing software		109	26%
Outsourced scanning/capture services		120	29%
Networked-attached multi-function peripheral device (i.e., a printer or copier that is also used for scanning)		213	51%
Network scanner		99	24%
Fax server software (to capture faxed documents)		140	33%
OCR software (to convert images to text)		228	54%
Software to convert documents INTO PDF		327	78%
Software to convert documents FROM PDF into other formats		146	35%






Please think specifically about how you use Network-attached multi-function peripheral devices (i.e., printers or copiers, typically in a workroom, that can also used for scanning).

Do you use one or more of these devices in your organization for SCANNING as well as PRINTING and COPYING?



Yes		292	69%
No		134	31%
<b>Total</b>		426	100%

## Industry Watch - Document and Records Types











How do you think your usage of multifunction devices for SCANNING will change in 2007? The amount of scanning on this type of device...

Will increase a lot		74	26%
Will increase		130	45%
Will stay the same		74	26%
Will decrease		7	2%
Will decrease a lot		2	1%
<b>Total</b>		287	100%

Which statement best describes how your organization views multifunction devices used for SCANNING?
















As a replacement for dedicated scanners.		57	20%
We use multifunction devices for some capture jobs and dedicated document scanners for others.		226	80%
<b>Total</b>		283	100%

What do you do with documents that are SCANNED using a multifunction device? (check as many as apply)

We e-mail them.		181	64%
We scan into a folder on the network		178	63%
We send them into an Enterprise Content Management system		79	28%
We send them into a Workflow system		71	25%
We send them into an Archiving/Records management system		112	40%
We send them into an ERP (Enterprise Resource Planning) system		20	7%
We send them into an Accounting system		30	11%
We send them into a CRM (Customer Relationship Management) system		14	5%
We send them into an Industry-specific application (e.g., mortgage origination)		17	6%
Other, please specify		14	5%

## Industry Watch - Document and Records Types

Please indicate if your spending levels are likely to increase for any of the following. CHECK OFF ANY AREAS IN WHICH AN INCREASE IS ANTICIPATED; YOU MAY CHECK AS MANY AS YOU LIKE.

Workgroup scanners (10-25 pages per minute)		32	10%
Departmental scanners (25-40 pages per minute)		66	21%
Low volume scanners (40-60 pages per minute)		35	11%
Mid-volume scanners (60-90 pages per minute)		72	23%
High-volume scanners (>90 pages per minute)		83	27%
ID card scanners		24	8%
Document capture software		149	48%
Forms processing software		74	24%
Outsourced scanning/capture services		70	23%
Networked-attached multi-function peripheral device (i.e., a printer or copier that is also used for scanning)		86	28%
Network scanner		42	14%
Fax server software (to capture faxed documents)		49	16%
OCR software (to convert images to text)		101	33%
Software to convert documents INTO PDF		91	29%
Software to convert documents FROM PDF into other formats		53	17%

## Industry Watch - Document and Records Types

How would you evaluate your satisfaction with each of the following aspects of the capture process in your organization?

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.	completely satisfied	partially satisfied	partially unsatisfied	completely unsatisfied	N/A or Don't know
Document Preparation -- Sorting documents, removing staples, preparing batches, etc	84 23%	149 40%	65 18%	31 8%	42 11%
Scanning -- The actual converting paper documents into electronic files, typically PDF or Group 4 TIFF images	145 39%	143 39%	50 13%	14 4%	19 5%
Recognition -- Automatically extracting data (from a form)	44 12%	100 27%	62 17%	48 13%	115 31%
Indexing -- Assigning index keywords to all documents so that they can be retrieved later	79 22%	137 37%	70 19%	34 9%	47 13%
Data Validation-- Validating the results of automated recognition performed on a form	50 14%	100 27%	57 15%	33 9%	130 35%
Quality Control and Rescanning-- Examining document to make sure they are scanned correctly and sending badly scanned documents back to be rescanned	80 22%	146 39%	67 18%	36 10%	41 11%
Document Release-- Exporting images to long term storage and data to a database or back end workflow or content management system	96 26%	126 35%	44 12%	35 10%	63 17%

Do you use ANY recognition technologies in your organization (i.e., technologies to exact data from images)?

Yes		185	48%
No		197	52%
<b>Total</b>		<b>382</b>	<b>100%</b>

## Industry Watch - Document and Records Types

Do you use OCR (Optical Character Recognition) -- to recognize machine printed characters from scanned documents?

Yes		158	88%
No		21	12%
<b>Total</b>		179	100%



Do you use ICR (Intelligent Character Recognition) -- to recognize hand printed characters?

Yes		46	26%
No		131	74%
<b>Total</b>		177	100%

Do you use OMR (Optical Mark Recognition) -- to recognize check boxes, radio buttons, bubbles, etc.?










Yes		34	20%
No		138	80%
<b>Total</b>		173	100%

Do you use bar code recognition -- to extract data from pre-printed bar codes?

Yes		113	63%
No		66	37%
<b>Total</b>		179	100%

Please think about what happens to documents once they are scanned.

To which specific APPLICATIONS do you send captured documents? (check as many as apply)






NONE...We don't scan into applications		60	17%
Enterprise Content Management system		147	42%
Workflow system		103	30%
Archiving/Records management		181	52%
ERP (Enterprise Resource Planning) system		19	5%
Accounting system		40	12%
CRM (Customer Relationship Management) system		26	8%
Industry-specific application (e.g., mortgage origination)		30	9%
Other, please specify		26	8%

## Industry Watch - Document and Records Types

Please think through the following generic business applications, and indicate whether scanning or capture technologies are used in these processes (note: the processes listed in each group are for illustration and not intended as a comprehensive list):

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.	We CURRENTLY use scanning in this process	We PLAN TO use scanning in this process	We DO NOT use or plan to use scanning in this process	Don't know
Finance (e.g. invoice processing, order processing, cash receipts, expense accounts)	156 46%	80 23%	54 16%	51 15%
Sales (e.g., order entry, contracts, lead tracking, forecasting, proposals)	82 25%	51 15%	100 30%	98 30%
Human Resources (e.g., applications, resumes/CVs, benefits forms, healthcare forms)	112 33%	104 31%	54 16%	66 20%
Customer Service (e.g., correspondence, new accounts, service requests, warranties)	127 38%	67 20%	62 18%	80 24%
Corporate (e.g., correspondence, litigation, contracts)	175 52%	84 25%	29 9%	49 15%
Marketing (e.g., leads & prospects, customer information, competitive data, surveys)	59 18%	73 22%	83 25%	114 35%
Mail Processing (e.g., mail that is opened and distributed from a central location)	73 22%	66 20%	123 37%	71 21%

Think about the Return on Investment (ROI) of your organization's scanning and capture implementation(s). Please select the statement that best summarizes your organization's experience with capture and scanning technologies COMPARED WITH OTHER SIGNIFICANT TECHNOLOGY INVESTMENTS.

Much worse ROI than other IT investments		5	2%
Worse ROI than other IT investments		30	10%
About the same ROI as other IT investments		142	45%
Better ROI than other IT investments		106	34%
Much better ROI than other IT investments		31	10%
<b>Total</b>		314	100%

## Industry Watch - Document and Records Types

What kind of an impact does SOA (Service Oriented Architecture) have on your capture and scanning purchase decisions?




A major impact		37	11%
A modest impact		42	12%
Some impact		78	23%
No impact at all		47	14%
I have no idea what you are talking about		133	39%
<b>Total</b>		<b>337</b>	<b>100%</b>















Ideally, how would you prefer to purchase capture and scanning technologies?

Direct from manufacturer		99	29%
From a local reseller		116	34%
From the internet		8	2%
From office equipment dealers		11	3%
Doesn't matter		110	32%
<b>Total</b>		<b>344</b>	<b>100%</b>

In US dollars, what do you estimate your total spending on document capture and scanning to be during the past 12 months?

<\$100K		183	56%
\$100K-\$500K		102	31%
\$500K--\$1 million		23	7%
> \$1 million		18	6%
<b>Total</b>		<b>326</b>	<b>100%</b>

Approximately how many employees are there in your ORGANIZATION as a whole?			
1-100		50	21%
101-1,000		56	24%
over 1,000		127	55%
<b>Total</b>		233	100%

In which industry sector does your organization operate?			
Banking & Finance		41	18%
Insurance		27	12%
Chemicals & Pharmaceuticals		8	3%
Construction & Building		5	2%
Consultant		10	4%
Education		11	5%
Government & Public Services – Federal Level		15	6%
Government & Public Services – Provincial, State, or Local Level		35	15%
Healthcare		18	8%
Information Technology – NOT in the ECM industry		15	6%
Information Technology – a provider of document or content-related products and services		0	0%
Legal		3	1%
Manufacturing & Engineering		14	6%
Retail		1	0%
Service Bureau or Service Company		11	5%
Telecommunications & Media		1	0%
Transportation & Distribution		1	0%
Utilities, Oil & Gas		6	3%

Pick the choice that best describes your role within your organization:

Line-of-business or process owner (president, CEO, senior executive in charge of particular non-IT function)		0	0%
Records or document management practitioner		0	0%
IT manager or executive		233	100%
Other, Please Specify		0	0%
<b>Total</b>		233	100%

In which country are you located?









United States		175	76%
Canada		9	4%
United Kingdom		5	2%
Other, Please Specify		40	17%
<b>Total</b>		229	100%

Which of the following do you use to gather information about scanning and capture technologies (check as many as apply)?

Search engines (e.g., Google, Yahoo)		145	62%
Word of mouth		100	43%
AIIM Show		87	38%
Road shows and events sponsored by individual companies or groups of companies		85	37%
Webinars		107	46%
Industry experts/analysts/consultants (e.g., Gartner, Forrester, etc.)		107	46%
AIIM road shows (US and UK)		52	22%
Events and conferences focused on your specific industry		128	55%
Magazines		143	62%
Company web sites		132	57%
AIIM web site		134	58%
Podcasts		10	4%
Blogs		14	6%
Other, Please Specify		13	6%








Think about the reasons why you might implement scanning and capture technologies in your organization.

Please check the TWO that are the MOST important (please check only TWO).

Compliance		60	26%
Leadership, competitive advantage		20	9%
Improve efficiency and productivity		181	78%
Risk management/Business continuity		55	24%
Better customer service		64	27%
Reduce costs		68	29%
Faster turnaround, improved response		60	26%
Increased profits, better performance		27	12%

Think about the obstacles or potential obstacles in your organization to implementing capture or scanning technologies.

Please check off the TWO most important obstacles in your organization (please check only TWO).

Justifying the investment, board commitment		91	40%
Getting employee commitment		66	29%
Planning/Managing implementation, change management		80	35%
Understanding/Specifying requirements		50	22%
Selecting products/Suppliers		26	11%
Content control, data migration, and classification		74	32%
Integration of new technologies		78	34%

Who has the major responsibility within your organization for making purchase decisions on scanning and capture technologies? (Note: not necessarily who signs the final approval, but who is doing the real work of recommending what to buy.)

President or CEO		33	14%
Records or document management professional		20	9%
IT professional		114	49%
CFO		9	4%
Head of department		42	18%
Other, Please Specify		13	6%
<b>Total</b>		<b>231</b>	<b>100%</b>
















Does your company utilize ANY of the following scanning or capture technologies?

- Workgroup scanners (10-25 pages per minute)
- Departmental scanners (25-40 pages per minute)
- Low volume scanners (40-60 pages per minute)
- Mid-volume scanners (60-90 pages per minute)
- High-volume scanners (>90 pages per minute)
- ID card scanners
- Document capture software
- Forms processing software
- Outsourced scanning/capture services
- Networked-attached multi-function peripheral device (i.e., a printer or copier that is also used for scanning)
- Network scanner
- Fax server software (to capture faxed documents)
- OCR software (to convert images to text)
- Software to convert documents INTO PDF
- Software to convert documents FROM PDF into other formats

**If you use one or more of the technologies listed above, check YES. Otherwise, please check NO.**



Yes		220	94%
No		13	6%
<b>Total</b>		<b>233</b>	<b>100%</b>

Please look through this list of scanning or capture technologies and check off those that are currently used in your organization (check ALL that apply):

Workgroup scanners (10-25 pages per minute)		99	47%
Departmental scanners (25-40 pages per minute)		90	43%
Low volume scanners (40-60 pages per minute)		74	35%
Mid-volume scanners (60-90 pages per minute)		71	34%
High-volume scanners (>90 pages per minute)		77	37%
ID card scanners		42	20%
Document capture software		150	71%
Forms processing software		73	35%
Outsourced scanning/capture services		44	21%
Networked-attached multi-function peripheral device (i.e., a printer or copier that is also used for scanning)		112	53%
Network scanner		55	26%
Fax server software (to capture faxed documents)		89	42%
OCR software (to convert images to text)		132	63%
Software to convert documents INTO PDF		158	75%
Software to convert documents FROM PDF into other formats		67	32%

Please think specifically about how you use Network-attached multi-function peripheral devices (i.e., printers or copiers, typically in a workroom, that can also used for scanning).

Do you use one or more of these devices in your organization for SCANNING as well as PRINTING and COPYING?

Yes		151	71%
No		62	29%
<b>Total</b>		213	100%

How do you think your usage of multifunction devices for SCANNING will change in 2007? The amount of scanning on this type of device...

Will increase a lot		31	21%
Will increase		70	47%
Will stay the same		42	28%
Will decrease		4	3%
Will decrease a lot		2	1%
<b>Total</b>		149	100%
















Which statement best describes how your organization views multifunction devices used for SCANNING?

As a replacement for dedicated scanners.		36	24%
We use multifunction devices for some capture jobs and dedicated document scanners for others.		113	76%
<b>Total</b>		149	100%

What do you do with documents that are SCANNED using a multifunction device? (check as many as apply)

We e-mail them.		95	64%
We scan into a folder on the network		95	64%
We send them into an Enterprise Content Management system		42	28%
We send them into a Workflow system		31	21%
We send them into an Archiving/Records management system		55	37%
We send them into an ERP (Enterprise Resource Planning) system		13	9%
We send them into an Accounting system		14	9%
We send them into a CRM (Customer Relationship Management) system		8	5%
We send them into an Industry-specific application (e.g., mortgage origination)		21	14%
Other, please specify		9	6%

Please indicate if your spending levels are likely to increase for any of the following. CHECK OFF ANY AREAS IN WHICH AN INCREASE IS ANTICIPATED; YOU MAY CHECK AS MANY AS YOU LIKE.



Workgroup scanners (10-25 pages per minute)		24	15%
Departmental scanners (25-40 pages per minute)		32	20%
Low volume scanners (40-60 pages per minute)		20	13%
Mid-volume scanners (60-90 pages per minute)		25	16%
High-volume scanners (>90 pages per minute)		43	27%
ID card scanners		12	8%
Document capture software		84	53%
Forms processing software		57	36%
Outsourced scanning/capture services		27	17%
Networked-attached multi-function peripheral device (i.e., a printer or copier that is also used for scanning)		41	26%
Network scanner		19	12%
Fax server software (to capture faxed documents)		26	16%
OCR software (to convert images to text)		66	42%
Software to convert documents INTO PDF		45	28%
Software to convert documents FROM PDF into other formats		22	14%



How would you evaluate your satisfaction with each of the following aspects of the capture process in your organization?



Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.	completely satisfied	partially satisfied	partially unsatisfied	completely unsatisfied	N/A or Don't know
Document Preparation -- Sorting documents, removing staples, preparing batches, etc	38 21%	76 41%	33 18%	13 7%	25 14%
Scanning -- The actual converting paper documents into electronic files, typically PDF or Group 4 TIFF images	54 29%	87 47%	21 11%	13 7%	9 5%
Recognition -- Automatically extracting data (from a form)	19 10%	56 31%	49 27%	18 10%	40 22%
Indexing -- Assigning index keywords to all documents so that they can be retrieved later	34 19%	67 37%	36 20%	24 13%	22 12%
Data Validation-- Validating the results of automated recognition performed on a form	19 10%	68 37%	36 20%	15 8%	46 25%
Quality Control and Rescanning-- Examining document to make sure they are scanned correctly and sending badly scanned documents back to be rescanned	21 12%	82 45%	46 25%	13 7%	20 11%
Document Release-- Exporting images to long term storage and data to a database or back end workflow or content management system	40 22%	69 38%	29 16%	21 11%	25 14%



Do you use ANY recognition technologies in your organization (i.e., technologies to exact data from images)?










Yes		105	55%
No		86	45%
<b>Total</b>		191	100%

Do you use OCR (Optical Character Recognition) -- to recognize machine printed characters from scanned documents?			
Yes		91	93%
No		7	7%
<b>Total</b>		100	100%

Do you use ICR (Intelligent Character Recognition) -- to recognize hand printed characters?			
Yes		30	31%
No		68	69%
<b>Total</b>		99	100%

Do you use OMR (Optical Mark Recognition) -- to recognize check boxes, radio buttons, bubbles, etc.?			
Yes		29	30%
No		68	70%
<b>Total</b>		98	100%

Do you use bar code recognition -- to extract data from pre-printed bar codes?			
Yes		64	65%
No		35	35%
<b>Total</b>		100	100%

Please think about what happens to documents once they are scanned.			
To which specific APPLICATIONS do you send captured documents? (check as many as apply)			
NONE...We don't scan into applications		31	18%
Enterprise Content Management system		75	42%
Workflow system		51	29%
Archiving/Records management		77	44%
ERP (Enterprise Resource Planning) system		18	10%
Accounting system		22	12%
CRM (Customer Relationship Management) system		11	6%
Industry-specific application (e.g., mortgage origination)		23	13%
Other, please specify		15	8%






Please think through the following generic business applications, and indicate whether scanning or capture technologies are used in these processes (note: the processes listed in each group are for illustration and not intended as a comprehensive list):

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.	We CURRENTLY use scanning in this process	We PLAN TO use scanning in this process	We DO NOT use or plan to use scanning in this process	Don't know
Finance (e.g. invoice processing, order processing, cash receipts, expense accounts)	80 47%	42 24%	32 19%	18 10%
Sales (e.g., order entry, contracts, lead tracking, forecasting, proposals)	35 21%	30 18%	68 41%	31 19%
Human Resources (e.g., applications, resumes/CVs, benefits forms, healthcare forms)	47 28%	59 35%	39 23%	23 14%
Customer Service (e.g., correspondence, new accounts, service requests, warranties)	72 43%	42 25%	33 20%	22 13%
Corporate (e.g., correspondence, litigation, contracts)	76 46%	60 36%	15 9%	16 10%
Marketing (e.g., leads & prospects, customer information, competitive data, surveys)	26 16%	29 18%	71 43%	38 23%
Mail Processing (e.g., mail that is opened and distributed from a central location)	35 21%	33 20%	71 43%	28 17%






Think about the Return on Investment (ROI) of your organization's scanning and capture implementation(s). Please select the statement that best summarizes your organization's experience with capture and scanning technologies COMPARED WITH OTHER SIGNIFICANT TECHNOLOGY INVESTMENTS.

Much worse ROI than other IT investments		0	0%
Worse ROI than other IT investments	<div style="background-color: #4f81bd; width: 10%; height: 10px;"></div>	19	11%
About the same ROI as other IT investments	<div style="background-color: #4f81bd; width: 50%; height: 10px;"></div>	84	50%
Better ROI than other IT investments	<div style="background-color: #4f81bd; width: 30%; height: 10px;"></div>	56	33%
Much better ROI than other IT investments	<div style="background-color: #4f81bd; width: 5%; height: 10px;"></div>	9	5%
<b>Total</b>		168	100%





What kind of an impact does SOA (Service Oriented Architecture) have on your capture and scanning purchase decisions?

A major impact		15	9%
A modest impact		34	20%
Some impact		53	30%
No impact at all		44	25%
I have no idea what you are talking about		28	16%
<b>Total</b>		174	100%

Ideally, how would you prefer to purchase capture and scanning technologies?

Direct from manufacturer		54	31%
From a local reseller		69	40%
From the internet		7	4%
From office equipment dealers		4	2%
Doesn't matter		39	23%
<b>Total</b>		173	100%

In US dollars, what do you estimate your total spending on document capture and scanning to be during the past 12 months?

<\$100K		91	54%
\$100K-\$500K		49	29%
\$500K--\$1 million		10	6%
> \$1 million		20	12%
<b>Total</b>		170	100%

## SURVEY SPONSOR



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

ABBYY Software, as a leading developer of document recognition, data capture, and linguistics technologies, provides the foundation for many of today's popular content management and capture solutions. ABBYY's product offerings include; **FineReader Engine, Recognition Server, and FlexiCapture. FineReader Engine**, a comprehensive SDK, includes a full spectrum of ABBYY's recognition technologies with functions in four major areas: full-page recognition, zonal recognition, PDF conversion and data capture. Meanwhile, **Recognition Server**, a server-based OCR and PDF conversion solution, provides API access for delivering scalable, reliable and rapidly deployable OCR functions with turn-key integration. Finally, the **FlexiCapture** line of data capture and forms processing technology allow users to locate and extract data from forms and semi-structured documents.

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EMC Captiva is the leading global provider of input management solutions used to transform information from paper, fax, and electronic sources into business-ready electronic content. Captiva's suite of input management solutions meets the needs of organizations large and small and can readily scale from one department to a global enterprise. The comprehensive Captiva input management suite includes document

capture, form processing, invoice processing, intelligent document recognition and classification, distributed capture, imaging solutions, and applications monitoring.



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Kodak's Document Imaging business is an industry leader and digital innovator committed to helping companies capture, manage, archive, and deliver critical business information. Kodak is committed to providing a full complement of document scanners, software, solutions and services to meet the needs of customers worldwide.

The award-winning KODAK Scan Station 100—turns documents into files for sharing anywhere on a network with convenience and ease through an intuitive color touch screen—award winning KODAK i1200 and i1300 Series Scanners—deliver high image quality, speed, and affordability with the smallest operational workspace available—and the new KODAK i1860 Scanner takes production scanning to greater heights. All KODAK Document Imaging products and solutions are backed by KODAK Service & Support, named Best Support Organization at the 2006 International Business Awards.



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Kofax, a division of DICOM Group plc (LSE: DCM.L), is a leading provider of information capture software. Kofax products enable organizations to automate business processes and streamline transactions by collecting paper documents, forms and e-documents from throughout organizations, transforming them into retrievable information, and exchanging it all with line-of-business applications, databases and archives. Kofax products are widely used in finance, government, insurance, healthcare, and a broad range of companies and agencies that must capture critical business information from paper and electronic documents and forms.



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