KnowledgeLake

Document Imaging and Capture for SharePoint = ECM 2.0
Worlds Largest (Worst) Repositories

- E:/OnmyhardDrive/NotInSharePoint/GrowingEveryDay/ WhenILeaveYouWillNotFindWhatYouNeedInThisMess/ SomeOfTheInformationRelatesToContractsWorthBig$$ToOurCompany
Worlds Largest Repositories

– Email Inbox – Outlook - Email Distribution Lists
Enter the need for ECM

Not all data needs to go into ECM but highly valued information should be. Much of the rest could be.
ECM Information Input Sources

1. Information Worker (IW) Capture
   - Ad hoc input: scanning, electronic files
   - Desktop driven content

2. Electronic files stored on networks
   - Support for new initiatives
   - Feed ECM archive with files and metadata

3. Production Capture (paper to image)
   - Converting paper and working with digital images
   - Centralized and remote capture
   - High volume
   - Scan and index done by dedicated staff
Information Worker (IW) ECM

• Who are IWs
  – Senior management, middle management, staff, clerks from all departments
  – Busy people who don’t want new responsibilities unless the investment will make their job easier

• IWs Produce and Handle

$ High Value Content $
Information Worker ECM Challenge

• Ease of Use, they don’t want:
  – Onerous save and index processes
  – Searching multiple repositories for related content
  – Inefficient search process (lack of metadata)
  – Desktop not tightly integrated with ECM so users don’t publish content to repository

• Low user adoption defeats ECM investment
Introducing SharePoint
Fastest Growing Product
In the History of Microsoft
Microsoft’s ECM Philosophy: The Three “E”s

**Everyone Participates**
- Everyone in the organization has access to and benefits from features
- Capabilities can be adjusted – everyone sees as much as they need

**Easy to Use**
- Easy for IW: supreme user acceptance & supreme adoptability
- Easy for IT: great OOB, fast to deploy & easy to manage

**Enterprise Ready**
- Consistently high performance at scale
- Feature depth, customizability and extensibility
End-user Out Perspective Required

• Do we expect end-user to adapt to the system or should the system adapt to the end-user?
  – 99% of users are in long tail and do not have training or interest to participate in records management
• Balance between Empowerment vs. Control
• Seamless integration of records management into the document lifecycle making it easy for end-user to participate
  – Manual participation (e.g., Document Information Panel)
  – Automation (using content types and workflow)
• Familiar experience that is natural to the way people work today
• Common set of tools for users across information management applications
Information Worker Capture

• Rapid save and index to SharePoint
• Expose Capture via IW workspace
  – MS: Word, Excel, Outlook, PowerPoint
  – Enable capture to pre Office 2007 MS applications
  – Make non-SP desktop apps. SP aware: PDF, pictures, TIFF, MP3, WAV, video
  – Content onramp for all SharePoint initiatives
• Easy to edit and re-save content
• Auto application of retention policies
• Increases user adoption/behavioral change
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**Clinical Trials Agreement (#1304W-P)**

**INTRODUCTION**

Contoso recognizes the importance of the pharmaceutical industry in the clinical development of new anti-cancer agents. Contoso wishes to foster collaboration with industry whenever possible. As part of its mission to improve cancer care, Contoso shares with industry the important goal of defining the contribution of a new drug or biologic in the treatment of cancer. Contoso therefore recognizes and supports the need of a private sponsor to focus at the appropriate time on clinical trials which lead to a New Drug Application (NDA) or a Biologics License Application (BLA) since an NDA and a BLA, once approved, are the vehicles through which new anti-cancer therapies become widely available to cancer patients. Thus Contoso considers it appropriate for the investigators sponsored by Contoso to do clinical trials of interest to, and partially supported by a pharmaceutical firm, provided that the trials have scientific merit and are consistent with the overall goals of the investigators and Contoso.

Inasmuch as Contoso coordinates a large volume of clinical research with new anti-cancer agents, industry recognizes Contoso's need to be aware of industry's plans for the clinical development of new...
Production Capture

• Batch capture paper & electronic content
• OCR and searchable PDF
• Centralized and remote capture
• Tight SharePoint integration: http and SOAP, security, common libraries and taxonomy
• Network electronic file archives
  – Support new SP initiatives
  – Feed SP ECM with files and metadata
  – Web based indexing
**KnowledgeLake Query Results**

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**Hammock Jungle**

**INVOICE**

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Tax:

Shipping:

Miscellaneous:

Balance Due: $8,906.75

Please return the portion below with your payment.
Document Imaging Benefits

- Reduce Environmental Impact – Less paper
- Improve Operational Efficiency - Workflow
- Enhance Customer Service – Faster response
- Eliminate Shipping and Faxing – Dist. Capture
- Streamline Document Processing - Workflow
- Enable Regulatory Compliance – Records Mgmt
- Decrease Operating Costs – All aspects
- Decrease Storage Space – No more filing cabinets
- Provide Disaster Recovery - Backup
KnowledgeLake extends the native capabilities of SharePoint to give you the freedom and flexibility to scan, index, store, retrieve and view large volumes of documents in a variety of ways.

**Capture**
- Scan Paper Documents With Desktop, Departmental And Production Scanners
- Index Documents
- Release Into SharePoint Libraries

**Connect**
- Capture E-documents From Desktop, Outlook And Also Drag-n-drop
- Accurately Index Documents
- Release Into SharePoint Libraries
- Complete Process In Just 2-clicks!

**Server**
- Capture From Office Copiers, Multi-function Devices, Fax Servers And Network Scanners
- Index And Scan Via Web Browser
- Automate PDF, OCR Conversion

**Imaging**
- Database Lookup & Index Automation
- Perform Exact Relevance Searches With Any Combination Of Index Values
- Central Enterprise Indexing Schema
- Zero-footprint Image Viewer
What Competitors say about SharePoint.....

- What about scalability?
- What about features?
- What about the blob in the database?
- What about records management?
- What about workflow?
- What about my existing ECM investment?
- What about vertical solutions?
- What about 100GB content databases?
- What about integration with my LOB system?
ECM Gaps

Scalability
- Architecture Planning (see Scalability WhitePaper)
- Externalize the BLOB (MS RBS, EMC, Hitachi, BlueThread)
- Replication/Back-up (AvePoint)
- Autofoldering (KnowledgeLake)

Feature + Function
- Imaging (KnowledgeLake, Fujitsu)
- Workflow (Microsoft, KnowledgeLake, Nintex)
- RM (MS DoD 5015.2, OmniRim – Physical Records)
- ERM/COLD (Xenos, KnowledgeLake)

Enterprise Ready
- Search (FAST, MS Search Server, KnowledgeLake)
- LOBi (MS BDC/Duet, KLake, ERP-Link/SAP, KeyMark – GP)
- Adv. Capture/Classify (ABBYY, KeyMark, Cutting Edge, KLake)
- Security (Active Directory, MS-LDAP, KL Encryption Module)

Remaining Gaps Are Being Addressed
- Digital Asset Management
- Federated Search
- DoD 5015.4
- Compound Documents

Vertical Solutions
- ECM Deep Expertise/Consulting
- Taxonomy Management
- Governance Consulting
Total ECM with SharePoint

- Centralized and remote paper capture
- IW capture for electronic and paper content
- ECM enable all SharePoint views
- Metadata driven pinpoint searches
- Total ECM w/ SP: scan, index, search, view, manage
- Leverage SharePoint: repository, workflow, document management, records management, web content management
- Fast user adoption
KnowledgeLake Customer Processes

High Value Documents

Financial Services
- New Account Enrollment
- Loan Origination
- Post Account Processing

Insurance
- Claims Processing
- Sales
- Underwriting
- New Group Enrollment
- Broker/Agent Credentialing

Healthcare
- Medical Records
- Physician Credentialing
- Change Management
- Admissions

Public Sector
- Revenue/Tax
- Transportation/Public Works
- Health and Human Services
- Human Resources and Accounting
Sample KnowledgeLake Customers...

Financial
- Scottrade
- Bank of America
- Axis Capitol
- Western Union
- Lutheran Church Extension Fund
- Cambridge Investment Research
- Circle Lending

Healthcare/Insurance
- WellPoint
- Carle Clinic
- Good Shepherd Hospital
- BJC Healthcare
- AAA Auto Club

Retail/Mfg.
- Pella Window
- Build-A-Bear
- Save-A-Lot
- Valero Oil
- Delta Gas
- Advantage Sales/Marketing

Government/Education
- Unified Government
- Adams County
- State of Illinois
- Washington University
- Winona State University

Notables...

Scalability
- Scottrade – 20M Documents, 275 Capture Locations
- Accosta – 285 capture locations
- Advantage Sales/Marketing – 5,000 Users

Integration
- Amdocs – Oracle Financials
- Valero Oil – SAP
- Build-A-Bear – Lawson

Legacy Migrations
- Washington University – Optika/Stellent
- LCMS– FileNet
- Tricor Braun – Documentum
- House Hold Names
- Bank of America
- WellPoint
- Chevron
What Other Organizations Are Doing...

Jefferson County Public Schools
www.jefferson.kyschools.us

“Through the use of Microsoft Office SharePoint Server and KnowledgeLake we have laid a solid foundation for bringing Jefferson County Public Schools into the digital age.”

Doug Sutherland, Web Architect, Jefferson County Public Schools

Bank of Choice
www.bankofchoice.com

“... The problems of locating documents, moving documents through the approval process, and having documents available to customers regardless of which branch they enter – those problems are gone, thanks to KnowledgeLake and SharePoint Server.”

Dan Barbattini, Senior Vice President and CIO, Bank of Choice

Jefferson County Public Schools has improved accuracy and productivity in its Payroll and HR departments by implementing KnowledgeLake document imaging and Capture solutions to easily search and save critical student transcripts to SharePoint.

Bank of Choice found that paper-based loan approval processes were standing in the way of providing the fastest and most effective customer service. Bank of Choice adopted a complete document management system based on software from KnowledgeLake, a Microsoft® Gold Certified Partner. The result cuts loan processing time from days to hours, boosts customer service while cutting costs, and increases competitiveness.
“The document capture solution from KnowledgeLake and Microsoft SharePoint has allowed Build-A-Bear associates to scan business critical documents from stores around the country and share them in SharePoint.”

Dave Finnegan
Chief Information Bear
*Build-A-Bear Workshop, Inc.*

“With KnowledgeLake and SharePoint, we got rid of faxing and emailing for approvals [and] we increased processing by 40%!”

Lewie Wake
CIO
*Advantage Sales & Marketing*

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“We now receive invoice approvals in hours versus weeks.”

Larry Bryant
AP Supervisor
*Amdocs*

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Client Testimonials
Legacy Imaging Systems Migrations to SharePoint

- Brokerage Firm – Westbrook Conversion 40 million images
- Manufacturing – Documentum Conversion
- Human Resources – FileNet Imaging and COLD Conversion
- Health Insurance – FileNet Imaging Conversion
- University – Stellent Conversion
- Distributor – Optika Conversion
- Oil & Gas – FileNet Conversion

KnowledgeLake
Microsoft SharePoint 2007
With KnowledgeLake Imaging
KnowledgeLake Solution Review

- Capture both Paper and e-Docs
- Share and retrieve all type of documents easily, fast and securely
- Built on Microsoft SharePoint technologies
SharePoint ECM Benefits

- **End-to-end management** – Integrate all processes, from receipt and processing to storage and retrieval.
- **Control and compliance** – Retain and retrieve documents in compliance with company policies.
- **Streamlined work** – Streamlined user interface based upon Office that integrates data from LOB systems and supporting documentation.
- **Customer responsiveness** – Quickly find up-to-date, accurate documents, and respond promptly to inquiries.
- **Elimination of paper** – Eliminate the need to physically store paper.
About KnowledgeLake...

**Company**
- Founded in 1999
- Headquartered in St. Louis
- Privately held by KnowledgeLake executives and Fujitsu

**Marketplace**
- Document Imaging & Capture for Microsoft SharePoint
- Regional offices throughout North America
- Partners throughout the world

**Experience**
- Years of experience with legacy ECM products
- First mover in SharePoint ECM since 2003
- 100’s of successful customers using SharePoint for ECM

**Microsoft**
- Managed Gold Certified ISV
- Member Technology Adoption Program
- Member Partner Advisory Council
- Member Developer Advisory Council
KnowledgeLake Solution Benefits

- Easy to install and use
- Leverages SharePoint investment
- Low entry cost
- Lost cost of ownership
- Products and Solutions
- Server-based imaging license
- No volume charges
- Common code based and central administrator for all multifunction, desktop and production scanners
- Broad feature set
ROI with KnowledgeLake

High% of imaging projects pay for themselves in less than 1 year

• KnowledgeLake drives user adoption
  – Ease of use of products
  – Automated content loading and indexing
  – Directed/Index Search with robust viewing
  – Consistent user experience with Office and Image documents

• KnowledgeLake drives Hard Costs Savings
  – Savings of 43 hours per year per employee (save, index, search 10 docs/day)
    • $1,000 per desktop user (SAVINGS POTENTIAL $$)
  – Save $20 in labor to file a document
  – Save $120 in labor to find a misfiled document
  – Save $220 in labor to reproduce a lost document

• KnowledgeLake helps leverage Microsoft Investment
Resources

- KnowledgeLake White Papers
- Product Demonstrations
- Streaming Presentations
- Webinars
- ROI Calculators
Contact Information

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KnowledgeLake