



HIT PRINT
INTELLIGENTLY

ACCELERATE business processes,
reduce COSTS,
CONTROL risk

Move from paper to digital document capture for improved business processes.

Executive summary

Documents are turning digital. Although organizations may never move completely away from paper, companies will be challenged with the task of managing and processing information in both paper and electronic format. Their success will lie in their ability to do so proficiently.

The speed of business demands that decisions are made better and faster, and information is processed and shared efficiently, accurately and in a cost-effective manner. Companies must balance speed with concerns about improving business processes, being environmentally conscious and maximizing data security. Organizations must find ways to do more with less, comply with ever-changing corporate and government regulations, and effectively manage printer, paper and supply costs.

Digitizing your document-intensive processes and moving from manual, paper-based document tasks to an end-to-end, automated workflow can significantly transform the efficiency of your business processes.

With automated digital workflows, users can quickly sort, search and retrieve documents, allowing for faster action and better decision-making. What once was a physical journey to a file room to retrieve information can now simply be the click of a mouse. Active or living documents can be updated, tracked or changed, and users can effortlessly access documents via the Internet 24x7. Users can easily distribute final documents and their associated information to almost any source, including printers, faxes, e-mail and content management systems.

With a long history of leadership in imaging and printing, HP is uniquely positioned to help your organization transition to distributed scanning and printing. HP delivers end-to-end solutions to automate document-intensive processes rapidly, efficiently and more securely.

One employee manually identifying, declaring and classifying one record per day will cost an organization \$31.75 per year. If your organization has 1,000 employees declaring 50 records per day, you'll be spending \$1.5M per year.¹

Improve document-intensive business processes.

Simply defined, document-intensive business processes are those in which the documents drive the work. Examples include: invoice processing, sales order processing, new account opening, benefits enrollment, case management and contract management.

Line of business or shared services managers look for opportunities to save money or cut unnecessary steps out of their processes, and document capture solutions can help achieve these business goals. Organizations can see savings in tangible and intangible areas.

A study by InfoTrends and ALL Associates Group notes that the average organization spends 6 percent of its annual revenue on paper document activities, including printing, filing, storage, etc. However, the costs involved in document management, which consist of indexing, searching, and retrieving paper and electronic versions, are between 25 to 33 cents per page or 50 percent of the total.¹ When you implement a document capture solution, your organization can reduce these manual tasks and the costs associated with them.

Automating enables faster service to customers, and allows your staff to be more efficient and productive. This process transformation is also better for the environment because it changes how you handle, manage and store all the documents you receive; allows you to print less; and reduces the amount of energy your organization consumes. You'll benefit from increased security, which is more important now than ever because of the rapidly expanding digital universe.

IDC notes that the rate of "compliance-intensive" digital data will increase from 25 percent of the data produced in 2008 to 35 percent of the data produced by the end of 2012. This digital data explosion should cause businesses to act by developing and enforcing legally defensible protocols to manage digital data.²

Reducing your dependency on paper-intensive processes also cuts costs by enabling you to dramatically reduce the amount of office space used for file storage and archiving. Courier costs can be greatly reduced or eliminated because collecting centrally scanned documents is no longer necessary and digitized documents can be distributed electronically. Staff costs can be trimmed or redeployed because the number of work hours required to process information requests will be reduced—from data entry to document sorting. Your business can minimize the costs associated with errors, improve audit and compliance controls, and mitigate risk with noncompliance and subsequent restitution.

Information management lifecycle

Bridging paper and digital processes

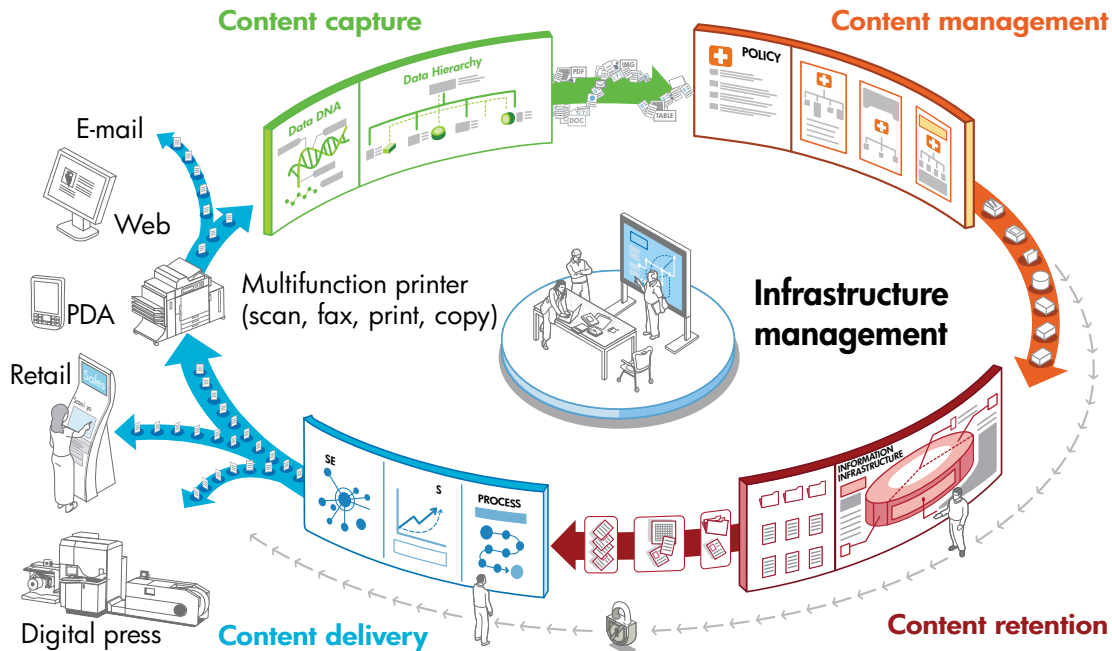


Figure 1. Managing information over the lifecycle

Paper is static.

Paper documents contain information that is not readily accessible, distributable or actionable. A business document's lifecycle includes its content capture, management, retention and delivery. At each of these stages, when the business document is fully or partially in paper, there are additional complexities. Documents must be duplicated, stored, and, most likely, secured or shredded, depending on the nature of the information they contain, in order to comply with industry and company-imposed standards. Retention of documents such as financial and patient records must be disaster-proof.

Manually searching for and retrieving documents is a process that can consume a large portion of an employee's time. When employees are burdened with loads of manual processing, finding and communicating information is difficult and negatively impacts your company's critical business metrics such as "time to revenue" or customer satisfaction.

Additionally, when paper is manually shuffled around the organization, mistakes or errors are made and not often realized until they are too far down the process to rectify easily. When you capture paper documents electronically as far upstream in the process as possible, validation, exception handling and decision making can occur at a more appropriate time.

Solutions for content capture

Whether a document is paper or digital, the information will flow through the same four phases shown in the above information lifecycle. However, the way the information is processed after its creation and capture, and the efficiency with which it circulates through this lifecycle is dramatically improved for a digital document.

Document capture lets you digitize content from paper documents and integrate it into your workflow. Capturing information via distributed scanning, classification and extraction technologies lets organizations streamline business processes. Document capture automates the processing of forms and unstructured documents. As organizations deploy these capture technologies and integrate their end-to-end workflows, the emphasis has shifted away from capture as a separate procedure to capture as an integral step or component of a larger business process.

Evolution of document management solutions:

- 1) Distributed scanning versus centralized, production scanning
 - 2) Classification versus manual sorting and routing
 - 3) Intelligent information extraction versus manually keying data
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Distributed scanning

Currently, many enterprise organizations send documents to a central location for scanning, consuming unnecessary time and creating the potential for slower customer response times, the risk of introducing errors, security threats and lower productivity. When a document arrives for scanning, trained scan operators use specialized and expensive equipment to process documents with which they probably are unfamiliar.

When organizations centrally scan documents, the information enters the workflow often from a remote location, away from relevant business processes. The point of entry is where an office worker with intimate knowledge of your clients, patients, students or vendors accepts control of a document. Since time is money, converting paper into digital images and data as close to the point of origin as possible allows your office staff to access the information much earlier in the business process.

Distributed scanning means the image collection and data input are digitally captured at the point of entry, using a standard MFP or scanner, and distributed to appropriate stakeholders within and outside the office. Documents that enter into the electronic processing cycle sooner can give your organization improved visibility and reporting, better exception handling, improved document security, less room for error or loss, and the ability to make better decisions on information faster.

Classification

Prior to converting a paper-based document into an electronic format, the document type needs to be identified for proper routing. In a manual, paper-based process, this is accomplished by having someone sort through a batch of documents, group together similar document types and then scan these in specially programmed batches. With digital document capture, auto-classification software can be used to automatically index, classify and route the documents into processing queues and then send the information into business processes and document management systems without human interaction. The software is responsible for sorting and sending each type of document according to the correct processing rules. Over time, the system learns the difference between distinct document types, for example mail, a mortgage application, an I-9 form or a picture ID.

Extraction

Extraction is a way to select information—either hand-written or typed data—from a scanned document and preserve it in an electronic format. Rather than manually entering required data, intelligent information extraction uses software to pull the data you're seeking from a scanned document, and safely store the rest of the data you don't need. Data extraction tools save staff time and dramatically expedite the processing of forms, invoices, mail and other data-intensive documents that have portions of data that require processing.

The extracted data is then validated against other systems or databases and exported via XML along with the image file to a variety of destinations. Extraction reduces the time and effort to sort data, the likelihood of introducing errors and the amount of necessary storage space for data.

Change that fits your business

Not all documents are created equal. Document capture represents different opportunities for all types of businesses, including:

- Transforming and moving information from distributed sites to central locations, including bills of lading, invoices and credit applications
- Eliminating or reducing paper, including patient records, records management and contract management
- Increasing accessibility of customer-facing documents, client matter work and project-based work
- Entering data from surveys, orders and forms

Document capture solutions help organizations streamline operations, reduce exposure to risk and deliver significant return on investment.

Go paperless.

You can eliminate or substantially reduce paper within your organization. When information is captured and digitized, the need to store and manage the original paper copy can often be eliminated, even in today's tightly regulated environment.

Electronic documents are more easily distributed to people and groups, which in turn can eliminate unnecessary copying of documents simply for the sake of distribution.

Increase accessibility of information.

Because dynamic, electronic information is easier to access than paper, content can be simultaneously made available to people across the enterprise for both use and re-use.

Use what you already own.

Adding a document capture solution to your existing content management infrastructure can give you the flexibility to capture paper-based content in formats that work within your existing infrastructure. You don't need to replace your existing tools and systems when you implement the right capture solution. This flexibility allows organizations to leverage their existing solution investments even further.

Reduce data entry and data capture errors.

The chances for user-caused errors are diminished when information is electronically captured at the point of origination and allowed to flow automatically through systems. Your organization will be more efficient because you've eliminated the need for labor-intensive manual processes.

Maintain compliance and control risk.

An organization's document capture system will protect, archive and enable the compliance of information throughout its lifecycle. This system improves document accessibility and distribution among internal or external parties using security controls and audit trails.

Accelerate business processes.

- HP delivers fast, simple and cost-effective ways to digitize, classify, index and send documents from their source to nearly any destination, almost instantly.

Reduce costs, help the environment.

- Reduced paper consumption is good for the environment, and decreases document transport and storage costs.

Control risk.

- A reliable HP document capture system protects, archives and enables the compliance of information throughout its lifecycle.
 - Realize improved document accessibility and distribution among internal or external parties using security controls and audit trails.
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The total package

You'll need the right tools to create a document capture solution. Assessment services help companies understand which problems to tackle first and determine what value you will receive to justify further investment. Feature-rich hardware and powerful software solutions from HP let organizations easily capture, route, manage and share documents across distributed environments and mixed platforms.

HP multifunction printers (MFPs) include industry-leading document capture features such as user authentication, send to e-mail, send to folder and send to fax.

HP partners with market-leading software providers from around the world to deliver innovative document capture solutions including:

- Optical character recognition (OCR)
- Document auto-classification and bar code recognition
- Forms and data auto extraction
- Route to enterprise content management (ECM)/records management/database systems

HP can assemble an affordable, efficient solution that can help you transform your organization from paper to digital. You can receive a return on this investment in months, not years.

HP has partnerships with leading third-party software providers to help you integrate paper documents into digital workflows. You'll find options that are flexible, affordable and capable of meeting the demands of your business.

Conclusion: move forward with HP.

The movement to automated workflows is building and this expansion is happening for the right reasons. Document capture will help you realize many benefits, including streamlining workflows, improving productivity, considering the environment and complying with security and regulatory standards, to name a few. These advantages can help your organization run more efficiently and remain competitive.

HP's partnerships with third-party software vendors have helped companies from all walks of industry find a solution that fits their business. HP has industry-specific capture solutions for financial service industries, health and life sciences, manufacturing and distribution, and the public sector. HP has the knowledge and experience your organization needs to transform its manual, paper-based processes into a digital workflow. With HP, your organization can have an end-to-end solution for document management from powerful scanners, multifunction devices and other hardware, to industry-specific solutions and services. Reduce the time, cost and hassle of capturing, managing and securing documents with fast, efficient HP document capture solutions.

You can accelerate business results and productivity with HP scanners and multifunction devices, proven HP and third-party software solutions, and world-class services to fit your general and specific workflow requirements.

Why HP?

HP is recognized as the global leader in imaging and printing solutions for large organizations. HP offers technical expertise, and reliable products and solution sets that allow customers to benefit from:

- Consulting services, including procurement, installation, management and support that can be customized to enhance your organization's effectiveness
- Relationships with industry-leading solution providers
- Powerful solutions to optimize your environment, improve the bottom line and help the planet

To learn more, visit www.hp.com/large/ipg.

1 Source: InfoTrends and ALL Associates Group, "Ready to Act: 3 Recommendations for Agile Processes," February 25, 2009.

2 Source: IDC, Worldwide Compliance Infrastructure 2009–2013 Forecast, #218531, June 2009.

HP three-part approach

HP works with you to assess, deploy and manage an imaging and printing environment tailored to meet your business needs, while helping you reduce costs, conserve resources and simplify document-intensive processes. HP's three-part approach:

Optimize infrastructure

HP can help you achieve a balance between your total cost of printing and your needs for user convenience and productivity.

Manage environment

Working together, HP can help you maintain your optimized infrastructure while improving business efficiency and tightening security.

Improve workflow

By streamlining your document-intensive processes, HP can help you deliver a more efficient environment for capturing, managing and sharing information.

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