

# Frequently Asked Questions

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## **1. What does ITG do?**

ITG provides a wide range of document imaging products and services, including complete in-house multi-user document imaging systems, web-based multi-user document imaging systems, imaging training, imaging technical support, and scanning services.

## **2. What is document imaging?**

Document imaging is a technology of digitizing paper files. In effect, we take a "picture" of each page and store it in a digital, electronic format rather than in a paper format. Document imaging has been around for many years, but it has only been in the past 10 years or so that imaging has been practical for most companies. Document imaging moves the information to the people rather than making the people move to the information. It performs a service similar to that of an accounting server in that it provides fast access to information. The difference is that the imaging server allows you to see the actual document, not just the data. It is an electronic filing cabinet of unlimited size that can provide access to any on-line document in less than 5 seconds.

### **3. What are the benefits of document imaging?**

The primary benefit of document imaging is time. Document imaging saves money by saving time. The biggest cost savings from document imaging comes from the reduced amount of time that must be spent in collecting, filing, maintaining, and storing documents. Imaging allows your company to grow without having to constantly add more clerical staff. If you can increase your business volume and not hire just one additional clerical staff position, the imaging system will pay for itself in less than 2 years. There are benefits from imaging in A/R departments, in A/P departments, and in HR departments. There are benefits from imaging in any organization that needs to store paper documents for long periods of time. Imaging saves time.

### **4. How long has ITG been in business?**

ITG has been in the document imaging business for more than 20 years.

### **5. Does ITG only provide services for local clients?**

ITG has clients in more than 35 states, from California to Maine. We have clients in Los Angeles, San Francisco, Denver, Dallas, Houston, St. Louis, Minneapolis, Nashville, Boston, Sarasota, Bangor, and many other cities around the country. Wherever your company is located, ITG can help.

### **6. What does "web-based" mean?**

"Web-based " means that a particular technical service is handled by ITG over the Internet rather than in-house by your own company's IT staff. Web-based services are a good way to handle business tasks that are not directly relevant to your core business activity.

### **7. What is a web-based document imaging server?**

A web-based document imaging server is one which is physically located at ITG's technical facility but which is connected directly to your company's own network. Where the server is located is totally transparent to the users. They have exactly the same features, functions, and capabilities whether the server is located in your office or in ITG's technical facility. The main advantage of web-based imaging is cost. Instead of having to purchase the imaging server, your company is billed a small monthly service fee for the services that they actually use. If in the future you decide you would like to move the imaging server in-house, the information is copied from the web-based server to the new in-house server.

### **8. How does scanning work?**

A scanner works exactly the same as a copier or a fax. Instead of getting a paper copy out the other side, an electronic copy is created. That electronic copy is then indexed and stored in the imaging system. The scanned image is typically stored as either a Group 4 TIF file or as a PDF document.

Most business documents are scanned at 200 dots per inch (dpi). Scanners can be either "simplex", meaning that they scan only one side of the page at a time, or "duplex", meaning they scan both sides of the page in one pass.

Most scanners have an autofeeder on them, just like a copier. A typical scanner has the capacity to take pages as small as a personal check and as large as 8.5" x 14". A good quality scanner as described here will probably cost around \$1,000. Scanners attach via a standard USB port to a Windows PC, not to the imaging server. The Windows PC must be attached to the network, be able to see the imaging server, and must have the imaging client software installed on it.

There can be as many scanners as are needed for a given imaging system. If your company has multiple locations, each location can do their own scanning. All images, as soon as they are scanned, are sent immediately to the imaging server. Nothing is stored on the local Windows PC. This means that everyone can have instant access to information, no matter where it was scanned. This also allows the scanning load to be disbursed over a number of scanning stations, reducing the amount of paper that each scanning station must process.

### **9. What kind of quality can I expect from scanning?**

The quality of the scanned image should be very close to that of the original image. It should be no different than the quality you would expect from a photocopy. And, just as with a copier or a fax, there are some things that will reduce the quality of the image. There are some shades of paper or ink that are difficult for a copier, fax, or scanner to reproduce correctly. Just as with a copier, it is possible to adjust the brightness and contrast on a scanner. This sometimes helps to improve the overall quality of the image. Prior to undertaking a new scanning project, we usually run a small sample through the scanning process to show you what the actual results will be. This is the best way to go, since it gives you an actual scanned sample for your review before you commit to a project.

### **10. Can the images be accessed via the Internet?**

Yes, using the new Web Access module, images can be viewed over the Internet. Web Access allows your company's own clients to access information in the imaging system via the Internet. They do not need any software other than their normal Internet browser. Extensive security is in place to ensure that they are only able to access information for their own company.

With the Web Access module, any of your clients who need a copy of an invoice, for example, can log on to the web page, enter their user ID and password, and then look up any document in their customer folder. By providing this tool, not only are the documents available to your clients 24x7, but also your staff time needed to support these types of requests reduced.

### **11. Can images be faxed?**

Any image in the system can be sent to a laser printer or it can be sent out as a fax without being printed. The images can be sent out to anyone that has a fax machine. If a customer has a question about a particular billing item, you can call the invoice up on the screen, get the customer's fax number, and send the copy of the invoice directly to the customer's fax right while you are on the phone. Going one step further, it is also possible to fax out invoices or statements to a select group of customers. Those customers who would prefer to receive their statements via fax can have them sent out automatically by the imaging system. This can reduce the cost of your postage and speed up the collection of your receivables.

### **12. Can images be e-mailed?**

Yes. Imaging currently supports Outlook or Outlook Express. To email a page or pages, first search for the documents that you want to send. Once you have found the documents, click on the Email button. This will open up a new Outlook message, convert the documents to PDF format, and add them as an attachment to the email message. All you need to do is to enter the email address and the subject. Many clients use this feature to automatically send out invoices or statements as an email rather than mailing paper copies to their customers.

### **13. Are scanned copies considered to be legal copies?**

Yes. In 1999, the United States Congress passed the "Electronic Records in Commerce" act which, among other things, basically says that a copy from an electronic source such as a CD or an imaging system is considered to be the same as a photocopy.

### **14. What is "OCR"?**

OCR (Optical Character Recognition) is a process that converts a scanned image into text. Even though the scanned image can be read by the users, it appears to the computer to be just a series of black and white dots. This is sometimes called a bit-mapped image. OCR looks at each character on the scanned image and tries to determine what letter or number it is.

The success rate of an OCR process is highly dependent on the quality of the original document. If the original document is a clean, laser-printed page, should correctly read 95%+ of the page. If the original document is from a dot matrix printer, will probably only get 75%-85% of the characters correct. Even with a clean, laser-printed page, if the original is a form with boxes, lines, and shading on it, will have a difficult time reading it. OCR does NOT read handwritten information.

The advantage of using OCR is that it creates a new text version of the image. That text version is fully text searchable. That means that you can search for any word or phrase and have the imaging system pull up just those pages on which that word or phrase appears.

OCR is of great benefit in certain situations and of limited value in others. For example, OCR is a heavily used tool with law firms. They sometimes need to scan in hundreds of boxes of documents and then need to find any page where a particular word or name appears. Doing this manually, by reading through every page, is obviously a laborious, time-consuming, expensive, and haphazard approach. With OCR, we can scan all of the pages, process them through the OCR module, and create a complete set of fully text searchable documents.

On the other hand, OCR is not used much in accounting environments. While OCR is a good tool, at best it can only be expected to hit about 95% accuracy. Most accountants are not very happy with 95% accuracy. They need to have 100% accuracy. This means that the text that OCR creates has to be checked and verified. This process often takes far longer than just keying in the important index information manually to begin with.

### **15. Can bar codes be used?**

Yes. In fact, bar codes can be of great value. Unlike OCR, bar codes can be read with a very high rate of reliability. While bar codes may not be 100% accurate, they are certainly in the 99+% range. We can read a wide variety of bar code formats, including 3 of 9 and 128.

Bar codes are used most frequently to print a key matching number on an invoice, or a delivery ticket that a customer signs as proof of delivery. When the signed delivery documents are returned to the office, they are scanned into the imaging system and matched up with the original copy. Without a bar code, this must be done by manually entering the key number via a 10-key pad. However, if the matching number is available as a bar code, the imaging system can read the bar code as the page is scanned. It then automatically matches the scanned page with the original COLD page. This eliminates a significant amount of manual data entry. Bar codes are used heavily in accounting environments to speed up the collection of important index information without any manual data entry.

### **16. What is "COLD"?**

COLD (Computer Output to Laser Disk) is a very important imaging technology. COLD allows documents to be sent from your existing accounting software directly into the imaging system without any scanning. COLD makes the imaging server look like a standard text printer to the production computer system. This means that invoices, statements, delivery tickets, purchase orders, payables checks, and even greenbar reports can be sent direct to and automatically captured, indexed, and organized by the imaging server.

Since the data is coming in as a standard ASCII print job, COLD can be taught where to find key index fields. For example, you might want to extract the invoice number, the invoice date, the customer number, and the customer name during an invoice print run. COLD

extracts these fields from each invoice, puts the information in the index fields, and then stores the image.

COLD allows you to capture vast amounts of data with virtually no manual effort. Anything that comes from your existing computer system that could be sent to a standard text printer can be sent to COLD. For example, as soon as the imaging system is installed, you could reprint invoices as far back as you have them on the accounting system and send them to COLD. By doing this, you would have a full set of invoices already in the imaging system, all indexed, all organized into customer folders, all fully text searchable and no one had to do anything other than push the button to reprint the invoices.

Another good use of COLD is to capture "greenbar" reports. These might be end of day reports, or aged receivables, or inventory, or any other report that the accounting system generates. Rather than printing off hundreds of pages of reports, and sometimes multiple copies of the same report, one copy of each report can be sent to COLD. COLD can be set up to watch for the in-bound reports and to file them into the appropriate folders. You might have an aged receivables folder, for example, for each week. Anyone who needs to use one of the reports can call it up by report type or report date.

Once they have the report open, they can search through it using a text search tool to find a particular word, or a customer number, or a SKU number. If someone is using an inventory report, for example, they might search for all pages that contain a particular SKU number. Once they have found those pages, they can review them on the screen or print out just the pages that they need.

Remember that COLD is just ASCII text. We do not need any OCR process to convert it. And, unlike OCR, it is 100% accurate.

### **17. How are documents indexed?**

This is a very important point. Most document imaging packages require that you use an external database to index the images. In other words, something like Access, Informix, or Oracle is generally needed in addition to the imaging software. This can add a significant cost to the imaging project. All of our indexing is internal to the imaging software. There is no external database required.

Since we do not rely upon an external database, we are free to index our images in a more flexible manner. With a database, every record must be indexed in exactly the same way. There can generally be as many indexes as are needed, but every record must have the same fields. With our imaging software, each folder, each document, and each page can be indexed in any way that you want. We use "free form" indexes. These indexes do not require a pre-set structure. You can use as many or as few key words for any folder, document, or

page. One document might have 2 key words while the next document might have 10 key words. It does not matter at all. You have the flexibility to determine exactly how you want to index the documents.

### **18. What about security?**

Security is a key concern with an imaging system. Much of the information that is stored in an imaging system is confidential. We have extensive security features to ensure that only authorized users have access to the images. When a user logs on, they must first supply a valid user ID and password before being given access to the images. Even beyond that, once they are in the imaging system, it is possible to control what they can see. The system provides tools that allow or deny access to file cabinets, file folders within a cabinet, and even documents within a folder. This can be done on a user-by-user basis. It is controlled by the user ID that was used at login. These features are part of the optional Security module.

### **19. Can documents be annotated?**

Yes. The images themselves cannot be changed. That is a basic design concept of a document imaging system. You want to be sure that what you are seeing in the imaging system is an exact copy of the original document. There are times, however, when it would be helpful to add notes or other annotation to an image. Our software provides a number of annotation tools, including block out, highlight, underline, and sticky notes. All of the annotations are placed on an overlay, not on the image itself.

### **20. What is “Signature Capture”?**

The Signature Capture module is an optional module that provides tools for matching signed documents with the original COLD documents. The goal of imaging is to minimize the amount of manual effort needed to manage and store documents. When the original documents are sent to imaging, we capture all of the index fields electronically. The COLD document looks just like a photocopy of the original. However, it does not have a signature on it.

When the drivers make their deliveries, they get a customer signature at each stop. Those signed proof of delivery documents are then scanned into the imaging system and matched with the original COLD documents. In this matching process, it is very helpful to have bar codes printed on the documents. This minimized the amount of indexing that needs to be done during the scanning process.

### **21. What is “Statement Processing”?**

The Statement Processing module is an optional module that provides tools for creating invoices or statements that have all of the backup documentation attached. When you print statements with the Statement Processing module, the statements are created as always by the existing accounting software. But instead of being sent to the regular printer, they are

sent to the COLD printer. COLD captures all of the statements, extracts the appropriate index information, and then stores the statements. The Statement Processing module then takes over and prints the actual statements.

As the statement is printed, the Statement Processing module collects all of the signed copies for that statement and prints them on a page or pages immediately after the statement. So as each statement comes off of the printer, there is a statement page, then backup pages, a statement page, then backup pages, and so on. The clerk can take the statements right off of the printer and stuff them into envelopes. All of the backup documentation is already there. No one had to do any manual collation, sorting, or copying. The Statement Processing module did it all.

## 22. What is "Web Access"?

Web Access is an optional imaging module that allows your own customers to view copies of their invoices and statements on-line. They do not need any special software or any training. They log in with a pre-assigned user ID and a password. They then see a web page that has your company's name, logo, and graphics, along with a few "fill in the blank" boxes. The boxes are usually something like "Invoice Number" or "Statement Date". They can fill in the appropriate information, then request the matching documents.

Imaging searches for and locates the documents, converts them into standard PDF format, and displays them on the web page. The customer can view, print, or even download the PDF copies.

The goal of this module is to reduce the number of telephone calls that must be handled by the accounting department.