

# A paradigm shift in document capture and SharePoint

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When you say document capture, a lot of people automatically think “scan.” But using a desktop scanner is only one way to get content into SharePoint. It’s important to consider electronic documents and paper documents as part of a capture strategy, and to consider where you’re capturing the information. Then you have to be sure the right data is associated to the document, so once it’s in SharePoint, it appears in the right library and is searchable. The new paradigm in document-capture questions how you are managing input from multiple channels, where data is received, and how to intelligently classify data within SharePoint.

Information comes into a company in many different ways: e-mail, postal mail, fax, even electronic data streams. A single document type could arrive through four different channels and in multiple formats. Now, consider the business processes. When you establish a process for paying an invoice, reviewing a contract or approving a claim, do you want to do it differently based on the format of the document? No. You want consistency in the process and how the document is handled. Implementing a multi-channel capture strategy that includes document scanning, e-mail capture, inbound fax capture, and electronic data on a common platform lets you establish a single set of business rules about how information is processed once it’s received.

Next, where are you capturing paper information? Do you send all your paper to a central location to be scanned? Do you have branch offices or field employees that have to ship this information to the central site? What does that cost? Do you wait for customers to send you documents? If you do, then you need to consider capturing information where the business process starts, the point of origination. Extending the capture process beyond the scanner and out to the knowledge worker, the customer or the mobile worker represents a shift in thinking about capture. It now happens not just at the scanner, but also in the front office, from the Internet, or even off the network altogether.

In a branch office, what if you could capture content from a multi-function printer by simply hitting a button on the MFP panel? This wouldn’t require any special training or experience with scanning software or settings, and by the time you return to your desk, the document is in SharePoint. This is more efficient than scanning and entering data manually one document at a time at a desk.



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The ability for customers to submit documents directly into a process is an example of capturing data at the point of origination. Think about claims processing or loan origination, where a request for trailing documents is common. Customers can scan or upload documents in a customer self-service Web portal right from their home office. The document is injected directly into a capture process as soon as they submit it, no mailing or faxing required. Or even better, they can use a mobile capture application to do the same thing from a tablet or phone anywhere they may be. This doesn't mean simply taking a picture of a document; it means getting a scan-quality document from a mobile device that's every bit as good and process-ready as from a scanner.

Lastly, how do you ensure the right information about every document is automatically captured and associated with the document in SharePoint? Using advanced recognition technology to automatically classify and separate documents, and then to extract the right information from the document, is the future—what we call “touchless processing.” The burden of keying in the information is removed from the user, and the number of keying errors is significantly reduced. Plus, information gets into SharePoint that much faster.

It's a pretty significant paradigm shift when you incorporate multi-channel, point-of-origination capture, and touchless processing. And the best thing is that this all happens in a secure manner. You can track the document at every step regardless of how it's captured, and have a complete audit trail from the time of capture, through classification and extraction, until it appears in SharePoint. No shipping documents, no personal documents left in the gallery of someone's smartphone, no important information left lying around the fax machine. The end-to-end process is now secure, efficient and compliant.

*Dean Misenhimer is the Senior Director of Product Marketing for Kofax (<http://www.kofax.com>). He has more than 20 years of software leadership experience, with a focus on next-generation product strategy, Microsoft SharePoint, and front-office integration. Contact Dean at [Dean.Misenhimer@kofax.com](mailto:Dean.Misenhimer@kofax.com) (<mailto:Dean.Misenhimer@kofax.com>) or on at Twitter [@Dean\\_Kofax](#).*

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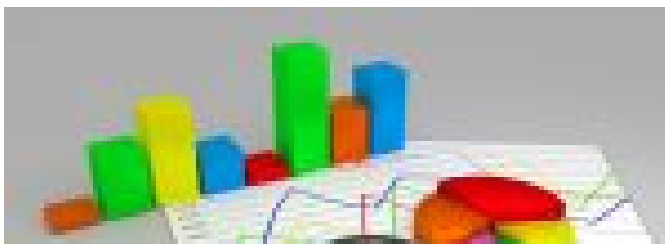
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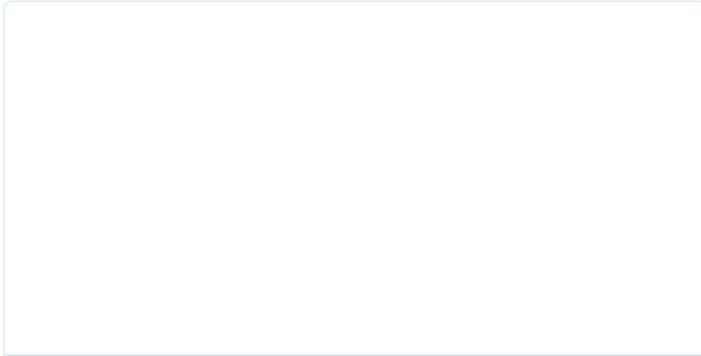
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