

A Problem | Solutions Brief from CAPSYS Technologies and Kodak Alaris

How Data and Document Capture Can Tame Shared Email Chaos

By Paul E. Szemplinski, CEO—CAPSYS Technologies

I. Situation: The Nightmare That Is Shared Email

Whether your organization is—

- Public, private, a government agency, or a not-for-profit entity
- In the healthcare, insurance or higher education marketplace
- A manufacturer, distributor, operate in the logistics field, or a very large Global 2000 company
- Or a small to mid-sized organization

You are likely feeling the pain and bad daytime dreams that accompany Shared Email Box use within your organization.

There is an influx of emails that arrive at your organization addressed to a mix of real-recipient and alias-recipient inboxes. Addresses such as AccountsPayable@xyz.com, salesorders@xyz.com, claimsadjudication@xyz.com, info@xyz.com or customerservice@xyz.gov or .org.

There is no real identifiable “person” assigned to the other side of these mailboxes—at least from the sender’s perspective. Internally, on the receiving side, you do have at least one person, sometimes an entire “SWAT” team accessing these real and aliased email addresses—known as the “Shared Email Boxes.” Unfortunately, this often creates a free-for-all approach in terms of who works inbound emails and how they are handled. It’s a process that could use improvement, but it’s difficult to know where to begin.

Team members are responsible for identifying which items belong to whom, working the item to its completion, and then moving that “finished” item out of the inbox into a Shared Email Box **sub folder**, to differentiate email items that are unread, inflight or email items that have actually been completed. We know the process of accessing a Shared Email Box is all manual—an ad-hoc, people-driven approach (prone to error) to working the items in the Shared Email Box, and there is no genuine accountability.

You may even have gotten a bit clever and set up auto-forwarding rules when a

message arrives at a Shared Email Box to circumvent some of these problems. But that, too, has been fraught with a new set of challenges when trying to manage team members who are out of office on vacation, extended leave, terminated, and such.

You have to trust if an inbound email was **marked as read**, it truly was worked by one of your team members. But you have no authentic means of determining, with any degree of certainty, if the item was actually worked all the way to completion. Just because it was moved or marked as read, does that serve as **conclusive proof** the item was worked to the completion and satisfaction of your organization and the sender? No, not really.

Unintended Consequences and Lack of Accountability

As previously stated, you likely have multiple people working email items in the Shared Email Box, so anyone may or may not have done anything at any time. Something could get marked read when really all they did was accidentally click on an item without any intention of actually examining the contents. Your team member could get

sidetracked and forget which email they were working on. **A user could accidentally hold the mouse button down while dragging the mouse pointer and then releasing, moving an item into another folder.** Where did “it” go? They could accidentally delete items. Who is to know who did what and when? The nature of Shared Email Box access simply offers **no effective means of achieving true accountability.**

So, you can’t easily obtain any real metrics around Shared Email Box activities either. A small sampling of metrics here includes, but are not limited to:

- a) The **entire process** in terms of time—from initial receipt to the final email disposition
- b) Metrics on **individual emails**, such as how long has this email been received by your firm but not worked by any individual
- c) Did my team member open the email, look at it and then determine, “I will work on this one later”—marking it back into an “unread” status—**activities or actions**, for example
- d) Did an email get **accidentally deleted** by any one of your team members?
- e) **When did an email** get assigned to a team member?

There are likely many more “metric ideas” running through your mind. However, you have likely arrived at the conclusion that there is simply **no practical way** to obtain metrics on:

- a) Your team members’ mailbox activities
- b) Items opened, marked as read, then set back to unread
- c) Emails with attachments and those without attachments
- d) Attachment counts
- e) Any exceptions
- f) File types and sizes contained in a message
- g) Alias recipient email addresses
- h) Unopened items in each mailbox
- i) Email counts by a specific sender or sender organization
- j) And many others

Certainly, Microsoft Outlook doesn’t provide any of this data readily or easily out of the box.

The Shared Email Box problems get compounded as the volume of emails increase. The only way to get the additional email items worked to completion is to add more headcount and computers, or devise another scheme to divide and conquer the increased workload.

What are you exactly dealing with at any point in time? You really don’t know, because **there is no concept of a dashboard** or any **analytics** to provide you with meaningful insight into the number of items in the inbox, those worked by team members, exceptions they’ve likely come across, attachments that can’t be opened, etc. You’re relying on your team members telling you they can’t get through the workload due to the increased inbound email traffic. You have no analytics to demonstrate where the inefficiencies actually live. (More about metrics and analytics to come.)

To Open or Not to Open, That is the Question

Attachments come in many shapes, sizes, file types and it’s likely your team has run into **attachment night sweats**. Your team members may not have the correct viewers to open certain file formats. If they open a bad attachment and your anti-malware or anti-virus software product didn’t detect the potential invader, this could bring down your entire organization due to malware, a virus, or even worse, ransomware or extortionware.

What do they do when emails arrive with **.zip or compressed** attachments? Who is unpacking and sorting through the .zip files? Each .zip file likely contains more than one file, so how many attachments are your team members actually encountering on a daily basis? What do your team members do when they come across .zip files that are **password protected**? One email could take hours to unpack, sort through, and figure out what needs to happen to process the work. Meanwhile, you may be wondering why he or she is taking so long to process a single email with just one attachment!

Your Shared Email Box is likely growing in terms of storage size, and because you are concerned about deleting any emails too soon, they are moved to a number of other subfolders. IT is (more than) “concerned” because storage costs and requirements are getting out of hand. Management of

mailboxes is also a nightmare or maybe non-existent. Searching through mailboxes is getting slower and slower. Creation of subfolders only kicks the can down the road and doesn’t solve the real underlying problem. You don’t delete the emails; you just move them to subfolders.

Employee turnover, training and security are also problems. **Allowing employees direct access to the Shared Company Email Box can be risky** on a number of levels. If you give them privileges to move items from one folder to another, then you are creating unnecessary risk to the mailbox and its contents, such as accidentally deleting items or misfiling. A disgruntled employee could do a lot of damage.

Opening and reading emails and associated contents are one aspect of the job, but what about **processing the actual contents**? These emails contain vital information, including invoices, sales orders, claims, underwriting info, etc. Critical content that needs to get processed in a timely fashion. Are you finding yourselves days or weeks behind?

Other Shared Email Box Gremlins

Based on Shared Email Box implementations across many organizations, here are some other common issues that have surfaced that may also be crossing your mind:

- Do you **keep the body of the email** or toss it? Sometimes it’s a definitive “yes.” Other times customers don’t need this info and it can be deleted. Or you may need a copy of the body of the email to be affixed to each attachment later, as you work through your workflow or business process. So you find your team members printing the email bodies out to affix them to each attachment printed—quite the waste of time and money!
- Who determines **where to route the emails and attachments**? Are they forwarding them along or worse yet, printing them out then forwarding the paper along?
- **Forwarding rules** are set up and managed by IT. Business users don’t usually have access to make any of these changes for security reasons. When team members are absent, you have to open support tickets with IT to get changes made in a (hopefully) timely manner. The emails can pile up fast.

- **Are you printing out emails along with attachments**, only to use all that paper in a **manual data entry process** in another line of your business system?
- Do you print out the emails and attachments only to **scan them all back in** to save them in an electronic filing system, such as a shared network drive, SharePoint, or something else?
- Do you then manually **rekey** all those emails back into your electronic filing system?
- What do you do about an attachment that's tens of pages long that is eventually determined to be a mixed bag of different documents that need to be broken up into separate documents? Do your people need a bunch of expensive PC workstation tools to **burst the pages out into separate documents** and then find themselves spending way too much time on **document disassembly, document creation, and document reassembly processes**?
- Are the **more difficult emails getting ignored** and moved to the bottom of the pile with the hope that some other team member will deal with these "problem children" later?
- How are you **dividing up the workload**? Sally will take all emails whose last names begin with the letters A-E, John will take F-Ks, Bob will handle L-Ps, and Jimmy has all the remaining items? It's likely all very manual, ad-hoc and your team members **pick and choose which items to work**.
- **How or who determines the priority** in which items will get worked when you have thousands of emails sitting in the Shared Email Box?
- **What's your internal SLA** on turning around incoming messages, and how do you measure whether or not you are even achieving your internal SLA?
- What happens when **John is on vacation, takes a leave of absence, quits, or is terminated**? How do you divide up his workload?

When Reality Sinks in

Did you really hire your team members to sort through, prioritize and select, print out emails and their attachments, disassemble and reassemble documents one by one—only to rekey the new data and documents

into your line of business system so they are now ready to be processed further downstream? Are you coming to the realization that maybe your organization needs a better approach to the Shared Email Box problem? Or that you need to put some structure, disciplines, and/or automation in place to tackle these challenges? Do you need to move your team members far away from Shared Email Box chaos and provide a smarter work environment and better tools?

All these manual steps, all the exceptions that occur during the day by each team member, all this wasted time, waste of talent, waste of paper, waste of toner, missed timelines, lost emails, increased business risk—is a Shared Email Box **really the best option** the 21st Century has to offer? Elon Musk is launching and landing reusable rockets—SpaceX and Starship—and your organization is having to contend with having multiple team members processing business transactions using a **manually driven, Shared Email Box** methodology? Yes, there's got to be a better way.

It's a given that you need the emails and attachments. What you may not know is your organization's issue is actually not really a Shared Email Box problem. The Shared Email Box is not the root cause of your organization's inefficiencies. You think of it as a Shared Email Box problem because you haven't had the time to step back and really examine the overall process—from the beginning to end. So what exactly is the **real problem** and what language most accurately describes it and the challenges your staff and organization are facing each and every day?

Now let's get granular and very precise with this discussion and apply effective terminology along the way so we can accurately describe what your organization is challenged with on a daily basis.

Casework, Caseworkers, Workflow, and Case Management

The thousands of items contained within the Shared Email Box are most accurately described as **casework**. Your team consists of **caseworkers**. And you do have a **workflow**; it's just not formalized, optimized, or automated. It's likely an unstructured or loose process that may not be well documented. The process of working through the items contained within the Shared Email Box and the interactions that occur with other IT systems—and any internal or external people involved throughout

the completion of the **casework**—is most accurately described as **case management**.

The email message and its associated attachments have important elements within and you need to **review, discern and process** these contents:

1) **Identify the vital sender information:**

- a. **The details**—person's name, or an alias name, domain name, subject line, date, time, body of the message, an attachment or attachments
- b. **Attachments** contain metadata that is also likely to be deemed important as it provides clues as to what the message body is likely referring to; things such as filename(s), file type(s), format(s), total attachment count, file size, etc.
- c. **Message priority**—normal, urgent, etc.
- d. **What action** the sender is expecting or requesting as a result of your **caseworkers** consuming the message and its associated contents

2) **The message contents likely represent business transactions** such as orders, change orders, invoices, underwriting information, claim adjudication materials, completed application data, tax-related documentation, support requests, etc. You need this collection of data and documents to process the work further downstream in your system(s) of record, such as an ERP or Line Of Business system. All of this content, and its associated metadata, is accurately described as **casework**.

3) **Sender information** is likely what is used internally by your team to determine **case assignment** or which **caseworker** should be processing the emails and **casework**. For example, the sender information identifies who the vendor is (in the case of Accounts Payable), and the invoice that needs to be verified against your PO system, scheduled, and ultimately paid according to your previously agreed-upon terms and conditions.

4) **Recipient data**. Let's choose the **alias recipient address** to illustrate a point. You got smart and rather than creating several separate Exchange or Gmail inboxes, you assigned 1-n alias names to a mailbox to make your email management less burdensome. What you didn't foresee

was the downstream consequence this created for your internal **caseworkers**. How do they determine what the alias recipient email address is in the context of the message? They can't—it's there, it just isn't made obvious or visible to the reader. When the email arrives in the designated real inbox, only the real inbox name is made visible to the **caseworker**. The **alias address** is only accessible by parsing through the email header. Have you tried to ever decipher where the email sender or email recipient address lives within the email header? It's not a pretty process, and now thousands of emails await your internal **caseworker** team members to open, view the email source file and the message header, and then search through the contents. Searching to find which alias email address was used in the message and attachments and how this info can be properly dealt with by the appropriate **caseworker** or maybe even another **department**. Painful. Time-consuming. Unproductive.

The **recipient data** is also used to marry the sender information to your team of **caseworkers** as described during the problem/challenges section previously discussed.

- 5) **Back to date, times, and priorities**—your **caseworkers** use this information to sort and process items. The reality is they pick and choose which cases to process first, rather than any system delivering the **casework** in the order to be processed based on your organizations established SLAs or business rules. (More on this later.)
- 6) Your **caseworkers** are taking the time to read the contents of emails and associated attachments and do something with that information besides **moving it to another Exchange or Outlook subfolder**. They likely are required to rekey some of the email contents into your main line of business system for further processing into your order entry, accounts payable, underwriting, warranty claims or the system that generates your revenue.
- 7) Usually, all these emails and attachments need to get **archived** somewhere/somewhat so your **caseworkers** can memorialize the supporting evidence behind your financial transactions. Hopefully you are not printing these all out only to have someone else scan and

file them away, but this does occur in a great many organizations.

- 8) What about all the valuable **metadata** that can be used to facilitate the production of meaningful **reporting services, metrics, and analytics** in the form of **dashboards**? It's all there; you just have no way to make use of it unless you hire programmers to extract it. Another IT project on your to-do list?

Now that we have adequately explained the problems and challenges organizations like yours face with Shared Email Box use, how do we solve the problems outlined? The good news is there is a solution and it's affordable. Here are the key terms we'll work with as we go forward:

- **Casework**
- **Caseworkers**
- **Case management**
- **Workflow**
- **Dashboard reporting and analytics**

Next, we will explain CAPSYS' unique approach to addressing and solving these problems of the **Shared Email Box**. *In other words, the better mousetrap does indeed exist and there's an ideal way to banish these associated nightmares.*

II. Solution: Transforming Bad Dreams Into Pleasant, Productive Days

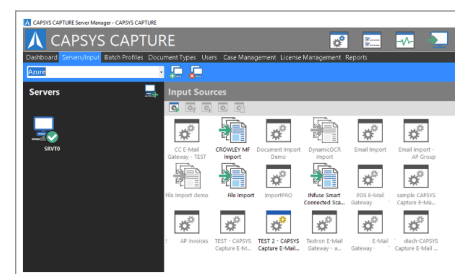
CAPSYS CAPTURE ONLINE: Built With Intent and Purpose

CAPSYS CAPTURE Email Gateway is a highly configurable component of CAPSYS CAPTURE ONLINE or On-Premises Purpose Built, Data and Document Capture Suite. Email Gateway automatically monitors 1-n of mailboxes in an unattended, lights out operation—consuming or **capturing** received emails, their metadata and any associated attachments, creating subsequent **casework and pages** in the CAPSYS CAPTURE Platform. That is a mouthful, but it accurately describes what the CAPSYS CAPTURE Platform can deliver for any organization.

The **CAPSYS CAPTURE Platform** is a comprehensive suite of data and document capture, case management, workflow, dashboard reporting, and analytic tools. CAPSYS CAPTURE is offered using two different deployment options:

- Traditional On-Premises, and
- Cloud—Commercial Edition and Government Edition

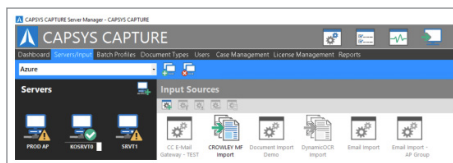
CAPSYS CAPTURE Email Gateway is highly scalable and highly available across both a 1-n number of **INPUT Sources** and 1-n number of CAPSYS CAPTURE Servers. We call this purpose-built, reusable componentry **Quick Server Extensions (QSxs)** or ExecuBots. The vast array of ExecuBots (and there are a lot of them... part of a growing library) is a huge differentiator for CAPSYS CAPTURE in the data and document capture marketplace.



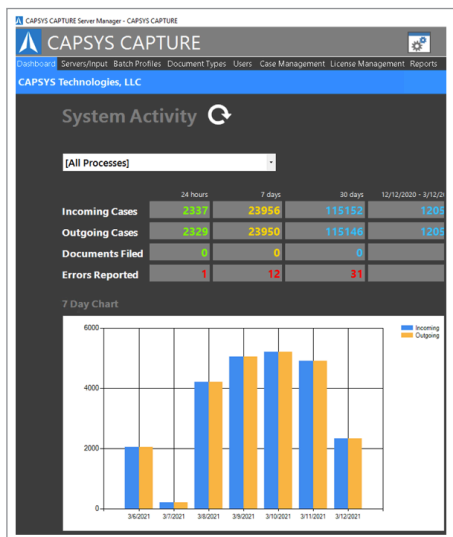
CAPSYS CAPTURE's configuration and deployment flexibility is not only about solving scalability and resiliency, although those are key success factors for CAPSYS customers. We purposely built the architecture so you can isolate mailboxes into different ExecuBot silos or categories. This unique approach to architecting these ExecuBots and underlying **server technology** greatly aids in the distribution of work and the abilities to isolate, assign, and direct mailbox **casework** to specific CAPSYS CAPTURE Workflows **and** CAPSYS CAPTURE Application Servers. The benefits to you are multiple.

Let's look at real-world examples. It's not uncommon for customers to have 1-n **Accounts Payable ExecuBots** isolated from 1-n **Sales Orders ExecuBots**, which are isolated from 1-n **Warranty Claims ExecuBots**, and so on. Each 1-n **Accounts Payable ExecuBot** may each service 1-n number of physical mailboxes. You may have one or more CAPSYS CAPTURE Application Servers processing email transactions. We can share email case processing across 1-n

of CAPSYS CAPTURE Application Servers, creating a cluster-like or **highly available** architecture. This is called CAPSYS CAPTURE Server Joining. Or we can isolate an Email ExecuBot to a single server. So you can scale up, down, across, and outward. The breadth and depth of flexibility is extensive.



From a metrics, analytics and reporting standpoint, this approach creates cleanly separated **casework**. Troubleshooting is also easier to manage. If you have an Exchange/Office365/Gmail mailbox issue occurring with a single mailbox, such as a corruption or virus/malware invasion, you can address the culprit without bringing down your entire collection of Email ExecuBots for the rest of the organization. The entire CAPSYS CAPTURE architecture is built on this **reusable and scalable** ExecuBot, server and workflow framework. As emails are received in an INBOX, both the **message body and any accompanying attachments** can be automatically ingested into CAPSYS CAPTURE creating **casework** for further content processing by either the use of automation and/or your **caseworkers**.



Bodies of email messages can be discarded, copied, and attached to each accompanying attachment and be placed at the beginning or end of each document automatically. Copies of the email bodies can be attached to the front or the back of each corresponding attachment, if so desired. No more copying or printing multiple copies of

Seriously. Better Document Capture.

IoT Smart Connected Scanning solutions from CAPSYS CAPTURE and Kodak Alaris provide a very simple platform to capture documents using a single push button interface. No PCs are required, no application software is required, no scanner drivers are required, and business users can perform installation. Businesses can be up and running in five minutes or fewer after receiving their IoT Smart Connected Scanning device. All initial and ongoing management aspects of IoT Smart Connected Scanning devices are performed securely through the Cloud using patented QR Code technology and remote management services. That means device configuration, diagnostics, device health, and much more eliminates the need for IT to have to worry about service and support. We take care of all of that on behalf of your organization.

IoT Smart Connected Scanning is the ideal solution for organizations wishing to capture various document types such as bills of lading and packing slips that are typically used in a three-way matching / Accounts Payable process. Once the content is captured, it can easily be married with existing **casework** in your CAPSYS CAPTURE Workflow process or be used to kick-off an entirely new **caseworker** process.

IoT Smart Connected Scanning is far superior to MFPs. Check out why we are so bullish on this subject by following this link:

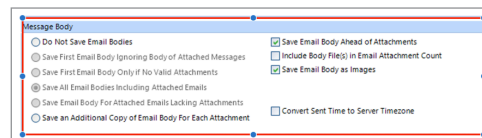
What's the difference between a Multi-Function Printer (MFP) and a purpose-built Document Scanner?



IoT Smart Connected Scanning devices also have direct hooks into Retarus' Global Cloud Messaging and Fax Services. IoT Smart Connected Scanning devices can capture all your physical documents and distribute them to your CAPSYS CAPTURE Case Management system or via fax through Retarus' Global Cloud Messaging system or **BOTH**. And all case history, corresponding email messages, attachments and resulting documents are managed by your CAPSYS CAPTURE workflow process. SMS Messaging is a key component of Retarus' Global Messaging Suite and can be integrated into your ERP, CRM or Line Of Business System. IoT Smart Connected Scanning + Retarus + CAPSYS CAPTURE Case Management can be your organization's winning formula.

IoT Smart Connected Scanning is the perfect complement to the rich portfolio of desktop, departmental and high-volume production document scanner products from Kodak Alaris and CAPSYS Technologies.

the message body and stapling them together is required. It is essential to understand at this stage, we have **captured the email, its metadata, and any attachments** and have automatically created a **casework** item.



With CAPSYS CAPTURE, we can use those ***original file names*** to set ***document type*** identifiers. Original attachment names can even be ***parsed*** using the ExecuBot technology contained in the ***underlying powerful rules-based workflow engine***. This greatly aids in the automatic identification and extraction of characters such as a name, claim number, VIN, parcel ID, etc. (ExecuBots do the heavy lifting in many document processing functions. More on these to come.)

Utility - Multi-Purpose QX5 (5.4.0.10)

CAPSIS (CAPTURE Utility) **Function:** RegEx

Regular Expressions

Document Type PD Adjuster Doctype

RegEx

Regular Expressions

Expression: Test

Input Field: Output Field:

Expression	Input Field	Output Field
\u0020*\?d(4)\-d(4)?\u00...	[BATCH]Ema...	Claim Number
\u0020*\?d(11)?\u0020*\?	[BATCH]Ema...	Claim Number
\u0020*\?A-HJ-NPR-Za-hj-n...	[BATCH]Ema...	VIN


External Server Settings


☐ Process Case using external Server Queue Path:

☐ Verbose logging

OK Cancel

Folder Settings

Mailbox: 

Move Messages To: 

☐ Permanently Delete Messages ☒ Optimize moves by using queries

If an error creating the batch occurs:

- ☒ Move the email to same folder as the others
- ☐ Leave the email in the inbox to retry on next poll
- ☐ Move the email to another folder

Duplicates detected can be moved into a duplicate mailbox folder of your choosing. All email message ingesting activities are logged into a comprehensive tracking database and can be reported using CAPSYS CAPTURE's ONLINE Dashboard offering. ***Your Caseworkers are not going to a Shared Email Box to get their work anymore.*** The casework is delivered and presented to them using a well-formed case structure in an easy-to-use case management-style user interface via a familiar web browser. Now, they don't even need access to the Shared Email Box.

☒ Move Duplicate Messages To:

Duplicates

Refresh

Duplicates Are Detected Via The Email Gateway History

Index Definition

To define a custom index, follow these steps:

1) Enter an index name

☐ Display indexes for selected batch profile only


☐ Display indexes for selected batch profile and all document types


The list of standard indexes are created in each batch or document by default:



- EmailEnveloped
- EmailBody
- EmailDate
- EmailFromAddress
- EmailFromName
- EmailHeader
- EmailAttachmentCount

2) Construct the value to be assigned to the index:

Select the CAPSIS Capture indexes or functions, or enter text.

 Add New Row

 Add New Row

Options:

3) Click Add

(Click to Edit)

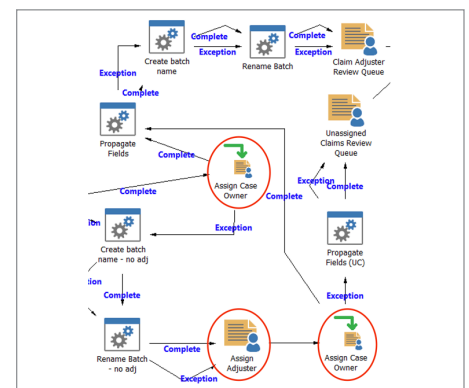
Date Time
Email Subject
FromAddress
To Address
From Address
MessageID
Attachment Count

Add

Delete

Copy indexes From: *

Field values can then be used to **route casework** to specific **caseworkers** who should be **assigned it** or it can be sent to a specific workflow for further automatic document processing. If **caseworkers** are absent from the job for any period of time, you can easily reassign **casework** to another team member in seconds.



Any additional content related to the **casework** that may arrive outside of your email system (such as U.S. Mail, FedEx, UPS, etc.) can easily be captured and associated with your **casework** through the addition of CAPSYS CAPTURE's IoT Smart Connected Scanning solution, **web capture** using **TWAIN-compliant scanners**, **document importing** through automation at the CAPSYS CAPTURE Server level, or through the **caseworker's interactive CAPSYS CAPTURE Web Client UI**.



The resulting **casework** is presented in an easy-to-use, secure **HTML5 browser UI** allowing for a **caseworker** to examine the **email case contents**, such as the body of the email and any attachments accompanying the message. **Attachments** are automatically **rendered and normalized** by the CAPSYS CAPTURE Server into a singular content format, such as searchable PDF or a TIFF image. When the rendering engine performs these content normalization processes, it completely eliminates the common challenging problem of **caseworkers** encountering document types that cannot be displayed due to missing or out-of-date viewer technology. Microsoft Word, Excel, JPEG, TIFF, PDF, BMP and many other file formats are all completely handled by the automated ExecuBot service without any human intervention. CAPSYS CAPTURE takes care of displaying and rendering the **casework** in the Web Client UI through practical, proprietary technology.

If the sender lumped all of their pages into a mixed, multipage PDF document and you need them burst into separate documents, the CAPSYS CAPTURE Web Client User Interface offers the ability to break a single document out into as many additional documents as your **caseworker** deems appropriate, along with providing the ability to reorder any of the pages. All this is done inside of CAPSYS CAPTURE Web Client UI, eliminating the need for extra viewers or applications to be licensed. The entire process is simple, efficient and fast.

Techie Talk

On-Premise vs. the Cloud

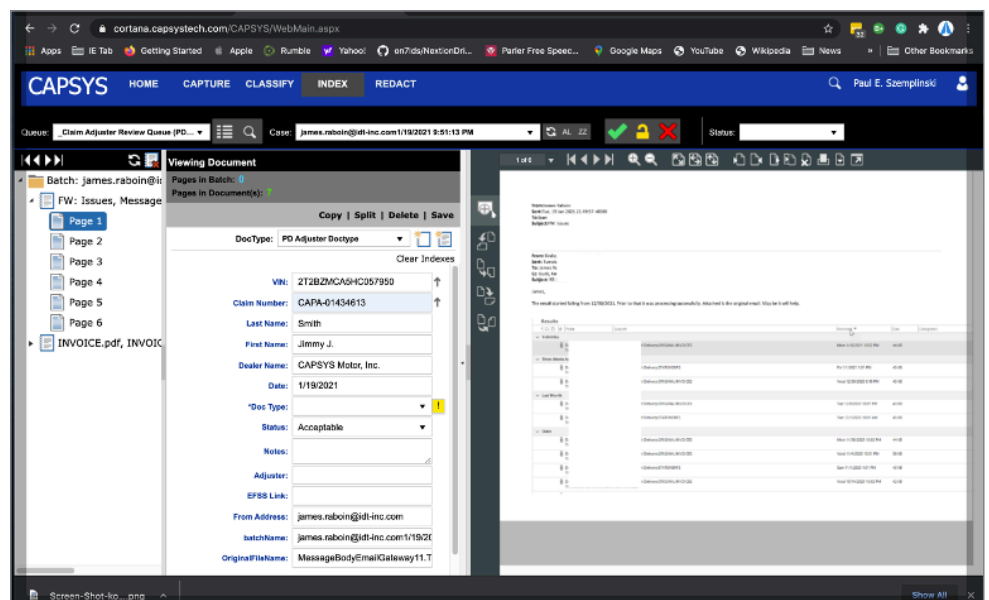
Yes, we support on-premise based installations. If you are up for provisioning, maintaining, securing, patching, updating application servers, web servers, SQL servers, establishing and maintaining disaster recovery plans, RTOs, RPO's, fault tolerance, onsite/off-site backups, networks, etc., then CAPSYS CAPTURE On-Premise is the way to go for you and your organization.

Alternatively, if you desire to set all that aside and leave it to the experts who have built all that infrastructure out and have it ready to go, then you may want to consider the Cloud option. We offer CAPSYS CAPTURE ONLINE in the Cloud, and it is deployed in through the global reach of Microsoft Azure Datacenters around the world. If you're a government entity or a defense contractor, you'll likely qualify for added security accreditations and

benefits from Microsoft Azure Government Edition deployment. All other market sectors can qualify for the Microsoft Azure Commercial Edition deployment option.

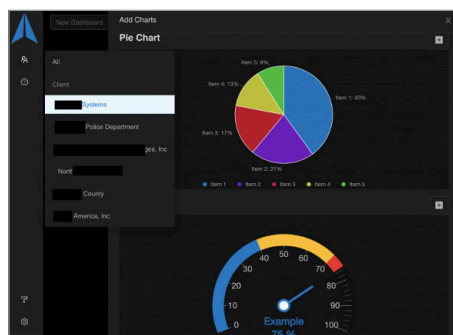
All that on-premise infrastructure you would need prior to deploying an application service such as CAPSYS CAPTURE On-Premise, we already have covered in either of our CAPSYS CAPTURE ONLINE Cloud Editions—Government or Commercial. Cloud rollouts occur much faster as deployments are built using the Azure SDK Framework. All the patches, hotfixes, OS, SQL, App and web services, redundancy, backups, etc. are all included in the subscription bundle, and all of it becomes something we and Microsoft handle, taking all the burden off of you. With the push of a button, we can have you up and running in minutes, not weeks or quarters.

In the end, you are the customer and it's ultimately **your choice**—On-premise or Cloud.



Any trailing documents that arrive via email after the initial case creation can be married with the previously created **casework** using our **Transaction Match ExecuBot** so we can keep your **case workflow package** and **casework history** intact. Speaking of casework history, **all transactions are logged** in an extensive **audit database** for tracking purposes—initial case creation, how the case was created (email, manually added, XML or document import, via fax services, etc.), any case interaction performed by your **caseworkers**, all automation steps performed by CAPSYS CAPTURE ExecuBots, and the process through **case disposition**.

Reporting and metrics are easily obtained using the **CAPSYS CAPTURE ONLINE Dashboard (CCOD)** offering. You can slice, dice, and illustrate the data in graphical form any way you like—from **initial case creation**, time it takes for a **caseworker** to complete his/her steps, any of the automation steps taken, length of time the **casework** was in process, any single step in the process, time to **case disposition**, etc.



CCOD provides configurable dashboards that allow users to delineate large volumes of transactional data contained in the CAPSYS database and visualize those data elements in a very usable and esthetically pleasing manner. CCOD can be configured to connect to both on-premise based deployments of CAPSYS CAPTURE and the Cloud Edition of CAPSYS CAPTURE ONLINE.

At the end of the **case management workflow process**, all of the **casework** can easily be exported and parked into a content repository of your choice: **Hyland OnBase**, **FileBound by Upland Software**, **VaultView by Tronitech**, Hyland's Enterprise File Sync and Share (EFSS) offering **ShareBase**, or a Customer Relationship Management System (CRM) such as **Salesforce**, your proprietary Line Of Business system, or any other content platform services offering of your choosing.

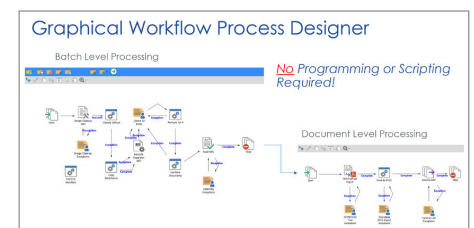
Your users do not need to manually export **casework** to external files or any of your internal business systems. The system's **workflow engine** takes care of **exporting the casework** to its final destination using built-in ExecuBot technology, such as **the Hyland OnBase or Microsoft Office365 SharePoint release module**. **CAPSYS developers easily build Custom ExecuBots**, because the underlying API used is the same API tool supplied to licensed customers who wish to create their own custom ExecuBots.

Workflow is the Driving Force

Why and how does all this automation work in concert with your people and business processes? Because the very foundation of the CAPSYS CAPTURE Suite was designed via a **Rules-based Workflow Engine**, called **CAPSYS CAPTURE Process Designer**, which is a component of the **Process Manager**. The **Process Designer** is used not only for designing esthetically pleasing process flows, but also allows the business analyst to construct business rules-based scalable,

extensible, and powerful capture process flows while maintaining CAPSYS' long-standing commitment to **no programming required**.

Drag and drop icons on to your map, and grab reusable ExecuBots from the vast library of pre-built QXs. Configure and connect the ExecuBot icons together on your **Process Designer Map**, activate, and you are in business. Design as many process workflows and maps as you need for varied, unique business processes. There's no limit to the number of business process automation workflows you can construct. Or, have us or one of CAPSYS' skilled, authorized business partners do it all for you.



Summary

If you're looking to get out of your Shared Email Box nightmare, then CAPSYS is here to help you start your smarter content services platform journey. Because today, it's likely you are losing sleep and your team members and organization are likely caught up in the following repetitive, inefficient, costly work steps:

- Attachment bursting outside of email with other programs
- New document creation via other programs
- Data extraction and data entry
- Re-rendering content into a standard format such as PDF
- Manually creating subfolders and moving emails to subfolders
- Reordering pages using third party programs
- Saving files from email to a network folder
- Re-importing files or rekeying into your line of business system
- Keeping a running tally on email items worked, email items in process, and email item reassignment

Bottom line: there is little or no accountability, and you are without any metrics or analytics in place.

With CAPSYS CAPTURE, your **caseworkers** do ***not have to perform any of these mundane, repetitive tasks, thanks to CAPSYS integrated automation.*** It streamlines the process of acquiring data and documents securely and efficiently for content services platforms and Information Management Systems. CAPSYS CAPTURE does the heavy lifting, so your **caseworkers** can focus on the value-added efforts that require the human touch.

You'll end up with **documented workflow processes** that deliver a predictable and auditable outcome every time.

Internal and external SLAs will be met with **certainty and accountability.**

You'll have **metrics and analytics** available in near real-time through the use of **customizable dashboards.**

If you need to add external documents to casework in process that arrive via Federal Express, UPS or USPS via a **scanning process**, you're covered with **IoT Smart Connected Scanning.** And, after all, document capture is ingrained in CAPSYS' heritage.

Your employees and customers will be delighted with the **technological and business process improvements** you've made for your organization.

Contact CAPSYS today for more information on leading web-based document and data capture system solutions for content service platforms systems. Believe us, you will sleep better and your team will enjoy many more productive, positive days to come.

###

About CAPSYS Technologies

CAPSYS Technologies is a leading provider and developer of web-based, **data and document scanning software** for Content Service Platforms and enterprise content management (ECM) systems designed to streamline the process of acquiring documents and information securely and efficiently. CAPSYS provides it's affordable, easy-to-deploy, web-based document capture software solutions via an HTML5 web browser requiring no workstation software to be installed, upgraded or maintained.

The company's primary product, CAPSYS CAPTURE, can easily and efficiently capture documents for organizations of any size and volume from anywhere at any time using any **web scanning** device in both centralized and distributed document capture environments. CAPSYS solutions are offered as a traditional **"on-premises"** license purchase, or via subscription-based, secured **Cloud Services** through Microsoft Windows Azure Data Centers (Commercial or Government Editions).

CAPSYS' **document scanning software** management team consists of content services and enterprise content management (ECM) industry veterans with decades of combined experience selling, supporting, implementing and developing world-class solutions from industry leaders such as Hyland OnBase, Oracle WebCenter (Stellent/Optika/Captovation), Microsoft 365 SharePoint, Kodak Alaris, Retarus Global Messaging Solutions, OpenText (Captaris/IMR), FileBound by Upland Software, ABBYY, and Kofax. With this experienced management team, CAPSYS provides affordable, easy-to-deploy, document capture solutions in a completely web-based environment through its national network of channel partners.

We are located in Colorado Springs, CO, with regional sales and development offices in California, and Illinois. Contact us today for more information on CAPSYS leading web-based document and data capture system applications for Content Services Platform solutions.

About Kodak Alaris

Kodak Alaris is a leading provider of information capture solutions that simplify business processes. We exist to help the world make sense of information with smart, connected solutions powered by decades of image science innovation. Our award-winning range of scanners, software and services are available worldwide, and through our network of channel partners. For more information, please visit AlarisWorld.com and follow us @AlarisWorld.



© 2021 Kodak Alaris Inc. TM/MC/MR: Alaris
All trademarks and trade names used are the
property of their respective holders.
The Kodak trademark and trade dress are used
under license from Eastman Kodak Company.