



technology services group

OpenMigrate for Enterprise Capture

Case Study

August 2009

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Introduction

Purpose

This case study details the use of Technology Services Group's OpenMigrate product in Enterprise Capture solutions. OpenMigrate is an Open Source document migration utility which provides a configurable and extensible framework to support extraction, transformation, and loading of content and associated property data between a variety of different sources and targets.

Business Issue

Many organizations today still support business processes that originate with paper documents. These processes can range from invoice processing to processing of medical forms. The initial step is typically to electronically capture the paper and store it in a content management system such as EMC Documentum or Alfresco where it can be handled electronically to automate further processing and distribution throughout the organization. This electronic capture is often handled by Enterprise Capture software such as InputAccel or Kofax. While these packages provide Export functionality to facilitate exporting content directly to content management systems, they lack flexibility in their setup and configuration to allow for the export options many organizations are seeking. They can also require significant handholding during operation to make sure exporting to the target content management system is proceeding smoothly. Using OpenMigrate to facilitate final export alleviates these issues by providing an extensive range of export functionality in one easily-configurable utility.

About OpenMigrate

Technology Services Group's OpenMigrate is an Open Source document migration and loading utility. The OpenMigrate framework is configurable, modular, and extensible, providing key capabilities to support enterprise capture.

- **Configurable** – The definition of the source of documents and data (e.g., file system), the target into which they are placed (e.g., Documentum, Alfresco), and how they should look in the target (folder location, security, document type, etc.) is completely configurable.
- **High-Volume Capable** – Multi-threaded architecture supports high-volume environments.
- **Extensible** – Easily extend OpenMigrate to support complex business rules or processing upon ingestion of captured content.
- **Open Source Framework** – As an Open Source offering, there are no additional licensing costs for utilizing OpenMigrate.

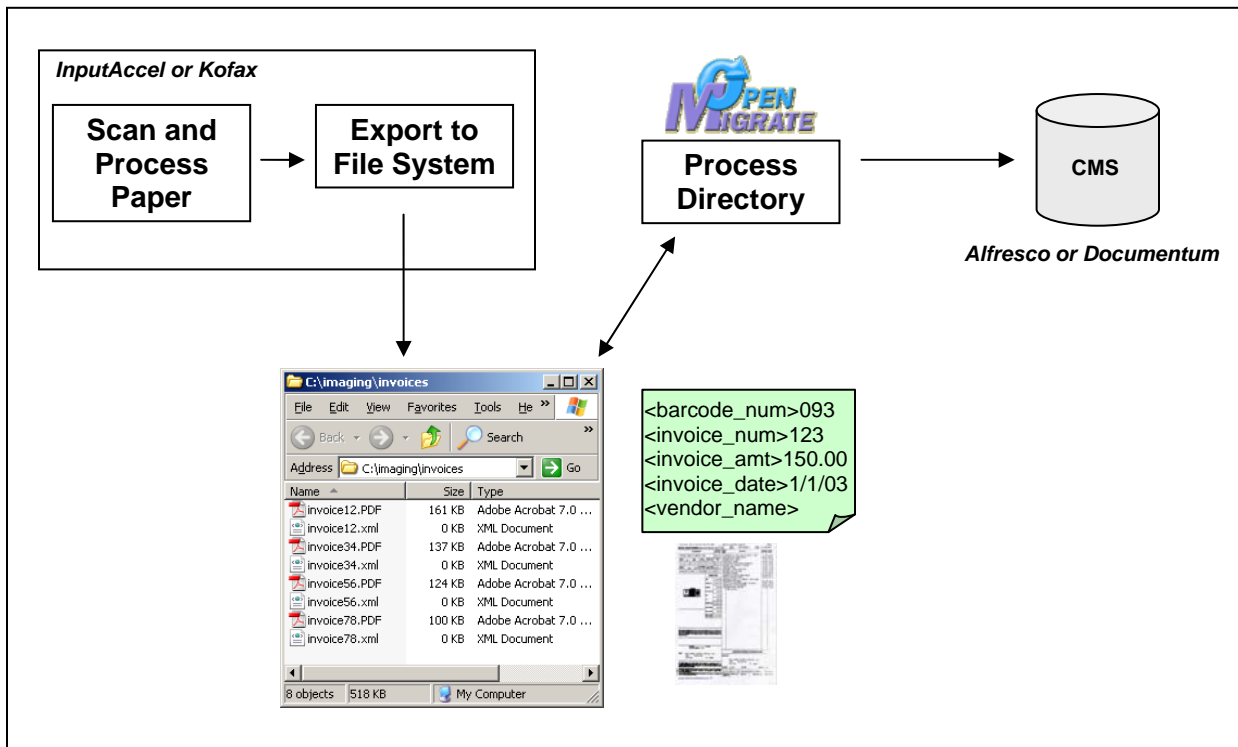
Visit our website at www.tsgroup.com for additional information on OpenMigrate.

Using OpenMigrate in Enterprise Capture

Integrating into the Capture Flow

In a typical implementation, the capture flow of the enterprise capture software (e.g., InputAccel) is configured to export scanned content and associated metadata to a designated export folder on a file system. The content can be in any format (e.g., tiff, pdf) and the associated metadata is typically exported in XML or simple text files.

OpenMigrate is subsequently setup to watch these export folders. As the capture software exports to the folders OpenMigrate processes the content and data, and based on its designated configuration exports to the target Content Management System (CMS), such as Documentum or Alfresco.



OpenMigrate Integrated into Capture Flow



Advantages of the Approach

Implementing OpenMigrate into Enterprise Capture solutions in this manner offers key advantages in processing efficiency, export capabilities, and enterprise capture architecture.

Processing Efficiency

OpenMigrate was designed from the ground up to support high volume data loading and migrations. This provides significant advantages over the native export modules available from the Enterprise Capture vendors. For example, when compared with the Documentum Export module from InputAccel the processing benefits of OpenMigrate include:

- True stand-alone, unattended operation. Unlike the Documentum Export module from InputAccel, OpenMigrate is not a Windows Client application requiring a module login. Issues with the Export module losing its connection and a system administrator having to re-launch and re-login are removed from the process.
- Multi-threaded operation allows for faster document loading. More documents can be processed at once without having to license and setup additional Export modules from the Enterprise Capture vendor.
- Increased error handling ability and logging functionality. Many clients find the Documentum Export module to be too much of a black box – when things go wrong it is difficult to determine why and re-process without re-processing an entire batch. Detailed logging as well as rollback and re-processing capabilities are available with OpenMigrate to make sure capture flows complete as intended.
- Native connections to target repositories ensure architecture components are not bypassed with OpenMigrate. For example, if a Documentum client has implemented Type-based Business Objects (TBOs) in their repository, exporting with OpenMigrate will ensure the TBO functionality is still executed – something not possible with the Documentum Export module from InputAccel.

Shifting the complexity of the export to the Content Management System to OpenMigrate allows the Capture software to focus on one basic export – to the file system – that it can complete reliably and efficiently. Since no external system connections are required, this simplifies the flow and allows OpenMigrate to do what it does best – move the content and data to the designated target.



Export Capabilities

OpenMigrate also provides significantly more functionality for supporting exports to Content Management Systems when compared to the native export modules from the Capture vendors. Using the Documentum Export module from InputAccel for comparison, key benefits include:

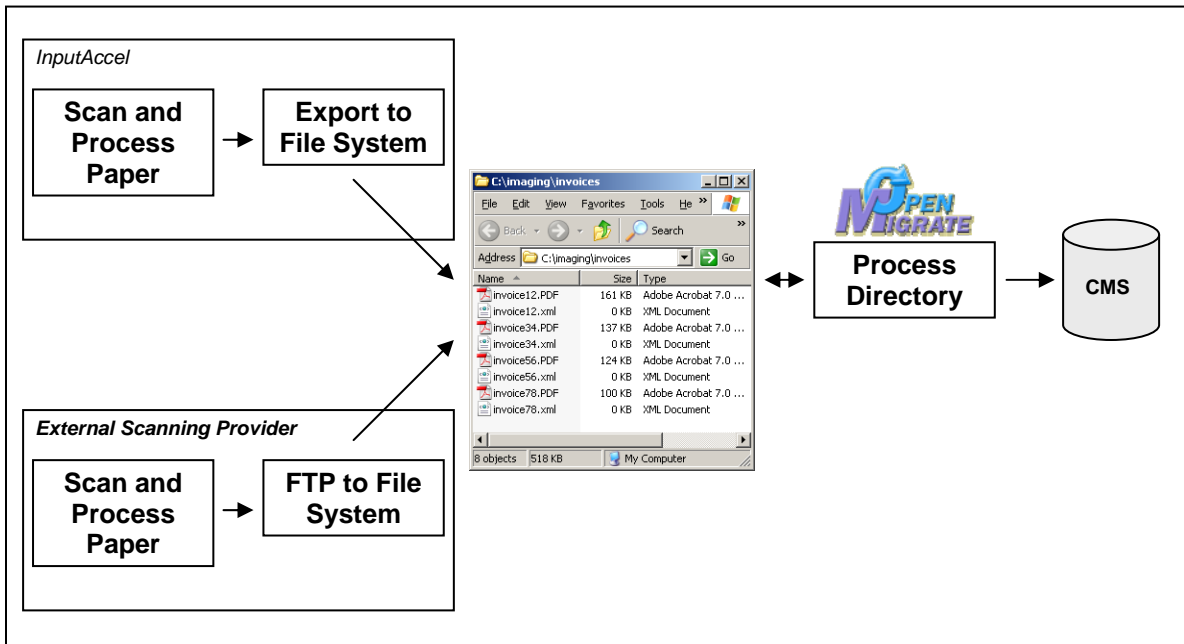
- Easily support creation of different object types in the target repository from within a single capture batch. OpenMigrate can be configured to create objects of specific types based on metadata values – for example, a purchase order can become a purchase_order document type while an invoice can become an invoice_document document type. The Documentum Export module is designed to instantiate all the objects it processes as one document type.
- Conditional security can be applied to documents based on metadata values using OpenMigrate. For example, invoices in a batch for Vendor ABC can have different security applied than invoices for Vendor 123. The InputAccel module is designed to assign one set of security to all the documents in a batch.
- Apply specific lifecycles based on metadata for different documents in a batch. The InputAccel module restricts to assigning one lifecycle for all documents in a processed batch.
- Enhanced ability to launch workflows for documents upon export to the Content Management System. The InputAccel module will allow users to specify one workflow to launch for all documents in a batch, but OpenMigrate can be configured to launch different workflows depending on metadata values, object type, etc. For example, an invoice with an amount >\$10,000 can be started on a workflow different from an invoice with an amount <\$10,000.
- For cases where configuration is not enough and extension is needed to support an export requirement, as an Open Source utility the source code is available and a framework exists to extend OpenMigrate. Extending the Documentum Export module would require additional licensing and knowledge of InputAccel's module design framework.



Enterprise Capture Architecture

A significant benefit with implementing OpenMigrate for capture solutions is the ability to have one export configuration support content that enters the organization from multiple sources. For example, once a watch directory is setup for OpenMigrate content coming from the Enterprise Capture software as well as content coming from other sources can be processed according to the same set of rules.

This exact scenario was implemented for a large Real Estate Investment Trust organization. All documentation on properties owned by the organization (leases, environmental reports, safety inspections, etc.) could either be scanned internally using InputAccel or also outsourced to a third-party scanning vendor. To support capturing content from both of these sources, the client implemented OpenMigrate to watch a folder accessible to InputAccel. This same watch folder was also made accessible to the third-party vendor to enable the vendor to deliver scanned files in bulk through FTP.



Supporting Capture from Multiple Sources

Implementing in this fashion eliminated the need for the client to support two separate loading applications for each source of documents. Regardless of where they originate, InputAccel or the third-party vendor, the documents are processed under one consistent set of rules by OpenMigrate.



Summary

TSG's OpenMigrate allows companies to simplify the setup, configuration, and maintenance of their Enterprise Capture processes while simultaneously providing increased functionality during export of captured content to Content Management Systems. As an Open Source offering, OpenMigrate can also provide cost savings as no additional licensing is required for implementation. Please see our website www.tsgrp.com for more information.