

OVERVIEW

DOCUMENT CAPTURE

Businesses that process documents have historically done so through paper processes – allowing for human error, loss, and other problems that arise with physical documentation.

But with the emergence of automation technologies and digital transformation, organizations have been able to leverage document capture to get accurate data from documents that allow them to stay compliant and efficient. Through document capture, users can get better insight into their data and improve overall productivity.

WHAT IS DOCUMENT CAPTURE?

Document capture – also known as data capture or information capture – enables organizations to process incoming documents and data and transform them into usable information. It's a solution that speeds up the management and processing of paper and electronic documents while allowing the user to properly index and deliver the right information to the right repositories or line of business applications.

The technology is flexible and scalable – enabling users to create definitions and rules for where and how documents are captured and indexed. It can work across multiple locations for any size business that typically uses manual-based processes for managing large volumes of documents.

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HOW DOES DOCUMENT CAPTURE WORK?

Document capture creates retrievable objects from documents received from multiple sources, including mobile, email, XML, EDI, multi-function printers (MFPs), web, fax, and scanners. Users can manually index documents, or the system can use transformation, templates, machine learning and artificial intelligence to extract data regardless of format. This data can be used for simple document storage and retrieval or to help automate creating transactions into your various systems of record. Document capture features include:

- **Integration with any system.** The right information capture solution will connect to dozens of line of business applications and ERP systems including SAP, Ariba, IBM, Oracle, Microsoft Dynamics, Workday, Infor and others. Integrating also means touchless capturing of documents produced by the ERP or line of business application. As your systems produce documents, those documents can be imported and indexed automatically and used to initiate a workflow or just stored for future retrieval and reference.
- **Configuration.** Document capture is configurable in several ways. You'll be able to tailor the solution to support your specific processes with modules, including capture source, image enhancement, document separation, document classification, data extraction, document storage target and data extraction target.

- **Automatic learning.** A superior document and data capture solution will be able to understand certain document types, become familiar with your business processes, and use learn-by-example technology to perform data extraction. Machine learning, artificial intelligence and natural language processing help extract more data more accurately to make this technology a transaction automation tool versus just a document indexing tool.
- **Device integration.** Information capture can integrate with hundreds of MFPs, including top vendors such as Canon, HP, Lexmark, Xerox, and more. These devices can integrate directly with the software or send documents to monitored folders and email addresses to be automatically imported.
- **Import connectors.** Eliminate printing, scanning, and users touching documents. Automated import connectors can monitor email addresses, folders, fax servers and other applications via web services to bring documents without user intervention. Documents coming into the company or documents being generated by the company can be captured within a completely electronic process.
- **Turning data into documents.** XML import and eForms are primarily data that can be stored as a document for users to retrieve or inject into workflow. XML, TXT, and other EDI type files can be imported using the mentioned import connectors and can have rules applied for data validation before being sent to workflow and/or the line of business application/ERP systems. The data can also be transformed to look like a document for users to retrieve and even share internally or externally.

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DOCUMENT CAPTURE GOES MOBILE, TOO

With mobile-based processes integrating heavily into business today, organizations need a way to enable employees to process documents through smartphones and tablets. That's where document capture technology with mobile capabilities comes in. A mobile capture platform allows for the capturing and processing of documents through hundreds of compatible devices – eliminating the need for users to manually enter information. Users can deploy a mobile capture solution across multiple areas of business, and it provides the following benefits:

- ▶ **Simplicity.** Through a single platform, you'll control image processing, data classification and extraction, validation, business rules, exception handling, and more – no switching among platforms per device.
- ▶ **Visibility.** You'll enjoy advanced analytics to get full visibility into your data.
- ▶ **Self-service.** Users will be empowered to interact with the business systems themselves through the easy-to-use tools that come with the platform.
- ▶ **Consistency.** You can build and deploy solutions for both employees and customers, including bill pay, customer onboarding, remote deposit, and much more so everyone interacting with your brand has a consistent experience.



ROBOTIC PROCESS AUTOMATION (RPA)

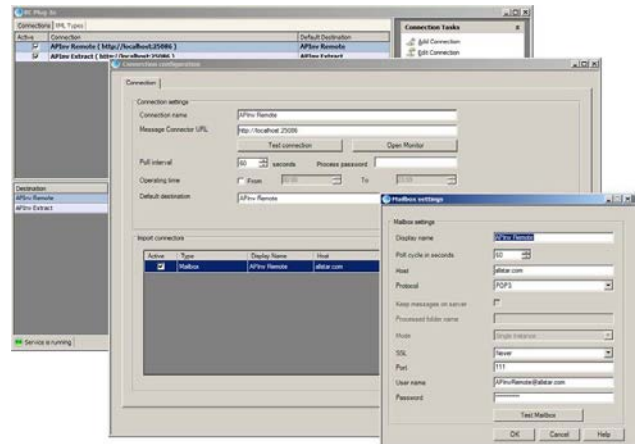
RPA has played a huge role in digital transformation. Pertaining to document capture, RPA is an important tool used to browse to web sites and download documents to be injected into other downstream processes like data extraction and workflow. Think of the steps users take to go to a vendor portal, log in, navigate to the appropriate page, perform a search scroll through multiple pages of results, download the document and reply to the portal confirming the document was successfully downloaded. RPA mimics user clicks and by definition is the automation of manual, routine and repetitive tasks like capturing documents from vendor portals.

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READY FOR DOCUMENT CAPTURE TO IMPROVE YOUR BUSINESS?

When you're able to automate the capture and distribution of your business content, you enable employees to work more efficiently and interact with customers more efficiently. You'll also reduce errors in your data capture process and create transactions with less user intervention to accelerate your business with both inbound and outbound transactions. All these benefits translate into a more productive operation and eliminate menial user tasks. If you think document capture could improve your business, contact All Star Software today.



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