ADVANCED DATA CAPTURE WITH WORKFLOW

Automatically and intelligently capture and extract data from scanned and electronic documents.

Automatically process extracted data and documents with integrated workflow.
Automatically and intelligently capture and extract data from scanned and electronic documents

Organizations often manually enter data from paper and electronic documents—such as sales orders, invoices, statements, HR documents, and A/R records—into their accounting, ERP, and other applications. Or, they use some electronic method, such as zonal OCR, for performing a partial and incomplete data extraction. These efforts can be time consuming, a waste of labor, and prone to errors.

Prism Capture easily and intelligently performs this task automatically. It is a low cost server-based application that automates this tedious document processing by quickly and effectively capturing, extracting, and presenting data from these documents. This data can be verified by a user and then automatically sent to the organization’s other applications.

Prism Capture also features a powerful workflow capability that enables the intelligent and automated processing of extracted data and documents. Custom workflows are easy to create.

Prism Capture is quick and easy to both implement and use. Best of all, Prism Capture is substantially lower cost than applications that perform similar functions.

This means you can measure your ROI in weeks and not months or years. Better performance at a better price.

Prism Capture is Different from Other Capture & Extraction Applications

- Integrated workflow
- Much lower cost
- Much easier to both set up and use
- Intuitive user interface
- Two data extraction methods: “Smart Template” & Standard Template
- Easy to “train” for template modifications
- Also works with Prism WorkPath’s powerful workflow & document processing automation
- Can be quickly configured to a third-party LOB application
How it Works

Prism Capture receives single or batched documents from many sources including scanner, MFP, fax, email, print stream, network or desktop. It then automatically identifies each document type and extracts the data you want.

The extracted data is then either automatically sent to a line-of-business (LOB) application, SharePoint, network folder, or presented to a user for verification through Prism WorkPath.

Prism Capture can also perform an automated look-up of this extracted data against a database and indicate inaccurate or mismatched information.

Unlike other data capture and extraction applications, document templates for data extraction are intuitively easy to build by the end user. Users simply select a document and set up areas from which data is to be extracted. The templates can be quickly modified to accommodate document variations. And, these template modifications are then remembered by Prism Capture and incorporated into all subsequent uses of that template.

Prism Capture can automatically convert documents to Word, Excel, and searchable PDFs. It also has connectors for output to file (XML, CSV, and Excel), database, DocRecord, and SharePoint. Through Prism WorkPath’s FastLink feature, a link can be quickly built to route Prism Capture output to a LOB application.

Document & Data Recognition

Prism Capture can automatically recognize the document and extract its data by different methods: automatically through a “Smart Template” look-up of keyword and values, “Standard Template,” or a combination of both.

Integrated Workflow

Prism Capture includes two fully-integrated workflow capabilities that replace manual document processing: Preprocessing of documents and post-processing of extracted data and documents.

The first workflow capability for document preprocessing allows users to quickly and easily build automated processes for such items as document conversion, color, page insertion and extraction, cropping, deskewing, and many more.

The second workflow capability is for post-processing of extracted data and documents and allows users to create automated processes for document approval, eSignatures, modifying, escalation, and much more.

Automatic Database Lookup

Once data is extracted, through either of the two methods, it can then be automatically compared to database information to check for accuracy and consistencies. Any data that is questionable will be highlighted for the user to check and then correct, if necessary.
Click Indexing

For users of Prism Capture, it’s important to quickly and efficiently edit unrecognized or incorrect extracted data from a document. Click Indexing allows the user to easily edit this data by simply selecting the metadata field that needs to be modified and then move the mouse over it. The corrected document values will automatically highlight as the mouse moves over the document's various values. When the correct value is highlighted, the user simply 'clicks' on that value which will enable it to be automatically filled into the selected metadata field. This eliminates having to type in the missing data.

Smart Templates

Smart Templates allow document information (metadata) to be automatically and dynamically recognized and extracted based on known text triggers - such as the words “Total” or “Customer” - or on data patterns within a given document type such as an invoice or check. This automatic recognition eliminates the need to create numerous zonal-based templates for these documents.

Several Smart and Standard Templates for common document types are shipped with the product and allow users to quickly get up and running. These pre-built templates can be easily edited and modified to a customer's specific needs. Additional custom templates can also be easily created by the end users that match his/her unique documents.

Easy Data Correction and Validation

All extracted data needs to be validated and, when necessary, corrected. Prism Capture makes data correction and validation easy by having prebuilt rules that examine and correct the data. These prebuilt rules eliminate the need for users to build their own data validation and correction rules. This allows users to become quickly productive with their data extraction requirements.

Easy Integration with SharePoint

Prism Capture is also used as a document processing application for SharePoint. Users can simply have the extracted data from their documents be used as metadata for SharePoint, and have Prism WorkPath automatically send both this extracted metadata and document to be filed automatically into SharePoint. Prism WorkPath allows for automatic folder selection with SharePoint.

Prism Capture also used by Prism DocRecord

A full-featured, dedicated-output version of Prism Capture is included with Prism’s DocRecord, an electronic document management system (EDMS). This dedicated-output version of Prism Capture within DocRecord outputs only to DocRecord and it has no separate data-extraction reviewer capability outside of DocRecord.

This DocRecord version can be easily and quickly updated, at a low cost, to the open-output version of Prism Capture presented in this literature. The open-output Prism Capture version includes output to SharePoint, line-of-business applications, file folders, databases, DocRecord, and file output (document, document and data file pair, and data only including XML, Excel, and CSV).

DocRecord is a low cost, all-inclusive, and full featured application that is simply priced by the number of concurrent users. In addition to capture, DocRecord functionality also includes eForms, workflow, and a number of user web and desktop interfaces.
**Fully Integrated with Prism WorkPath**

The combination of Prism Capture with Prism WorkPath provides users with an unprecedented combination of capabilities at a very affordable price.

Prism WorkPath is a stand-alone application for advanced desktop document and data processing. It can also be used as a client to Prism Capture. As a client, it allows users to perform a wide range of tasks and processes to their documents both before and after data extraction. Prism Capture includes one free license seat of Prism WorkPath.

**Before Data Extraction: Rearrange and Clean Up Image**

As documents are received into Prism WorkPath, users can choose from a wide range of image clean up and editing functions. These functions provide easy methods for users to easily enhance or amend these documents while still in the same application — no need to export the documents to another application. These functions include: Adding or deleting pages, concatenation, rotation, deskewing, despeckling, image enhancement, and a wide range of other functions.

**After Data Extraction: Data Review and Workflow & Automated Processing**

WorkPath can be used by individual users at their desktop to review, verify and, if required, modify data extracted by Prism Capture. Once verified, the data and documents are returned to Prism Capture for further processing.

Documents often require workflow once the data is extracted. The extracted data is sent to a LOB application while the original document, along with different metadata, needs to be archived in another application. Often, notifications need to be sent to others informing them that a document has been processed. With Prism WorkPath, it's easy to build workflows and document processes that do all of these things, and much more, automatically. Workflows can be easily set up for each different type of document allowing unique and custom processing.

**Automatically Create Searchable PDFs from Prism Capture Documents**

Prism WorkPath can also create searchable PDFs from documents being processed through Prism Capture. This allows the document to be completely searchable on any word within that document. This is important where these documents are stored in document and content management or archiving application, including SharePoint.

**Benefits**
- Speeds up document processing
- Automatically extracts document data
- Lowers document processing costs
- Eliminates manual document data extraction & processing
- Low cost & easy to use
- Reduce document processing errors
- Reduce number of people processing documents
- Automate sending data to LOB applications
- Automate filing documents & keywords

**For All Types of Documents**
- Medical claims
- Sales orders
- A/P & A/R document automation
- New hire onboarding
- Mortgage & loan documents
- Forms & electronic data submission
- Insurance & other claims
- Health records

**For All Industries & Departments**
- General Business
- Manufacturing & Distribution
- Healthcare
- Law firms
- Government
- Education
- Banking & Finance
- Insurance
- Retail
- Accounting
- HR
- Operations
- Legal
- Sales
About Prism WorkPath

Prism WorkPath is a very low cost and powerful desktop document processing application. Its features include:

- Custom-built workflows and automated document processing
- Sending documents to web repositories (such as Box, Dropbox, Google Drive, OneDrive, and others)
- Depositing documents into SharePoint and network folders
- Amending, editing and marking up documents
- Converting documents to editable Word and Excel formats as well as searchable PDF, PDF/A, and other formats
- Automated document redaction
- Document clean up
- OCRing of barcodes and data
- Automatically applying Bates stamps to documents for legal departments
- Adding barcodes, page numbers and watermarks
- Add, remove and reorder pages
- Drag-and-drop editing including combining multiple documents
- Automated document indexing
- And much more…

Automated Processing and Workflow

It’s easy to build customized automated processes and workflows. Prism WorkPath provides an intuitive and easy-to-use tool that allows you to assemble together different processing tasks. Snap together as many of these tasks as you’d like to create an efficient and automated customized process.

The extracted data from Prism Capture can be part of these automated processes and workflows thereby creating a powerful document processing tool at the desktop. Prism Capture also has its own workflow and automated processing capabilities. One free license seat of Prism WorkPath is included with Prism Capture.

Send Documents Automatically to DocRecord

Prism WorkPath allows you to check documents directly out of and into DocRecord, Prism’s award-winning electronic document and content management application. This permits Prism WorkPath to be a tightly integrated and coordinated document and data capture front end. This provides a level of power and value not found in other applications.

Send Documents Automatically to On-line Repositories

You can send documents directly and automatically to a number of web repositories such as Google Drive, OneDrive, Box, Dropbox, and others. Workflows are easily built to also send documents to these repositories.

Part of a Complete Document Ecosystem - Integration with ScanPath & ScanPath Express

Prism WorkPath is also fully integrated with ScanPath and ScanPath Express. These applications allow users to scan from a multifunction printer (MFP) directly to a Prism WorkPath workflow that is displayed on the MFP user panel. Additionally, the user can scan directly from the MFP directly to his/her Prism WorkPath application. This integration allows for a seamless ecosystem not found anywhere else.