



Prism Capture

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.

Prism Capture

Benefits

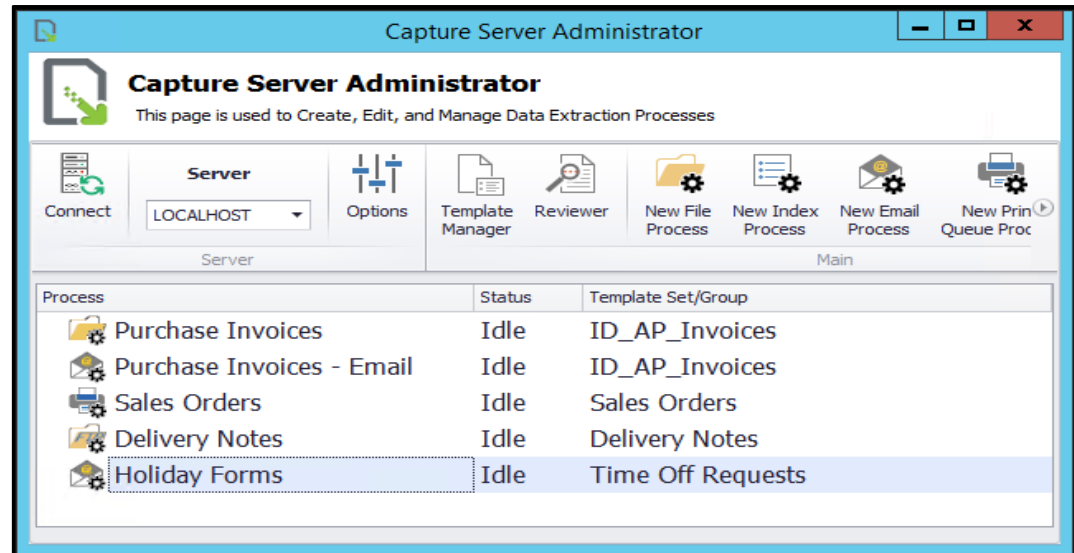
- Automate data entry processes
- Consistently work with paper and electronic documents
- Powerful integrated workflow, *includes WorkPath Process Server*
- Create searchable documents and automate filing
- Much simpler to implement and use
- Much lower cost than alternatives
- Faster ROI

Prism Capture

Add unlimited process inputs



- Watch Network Folders
- CSV indexing
- Email
- Print
- FTP



Input configuration

File Extraction Process Editor

File Extraction Process Editor
This page is used to edit the File Extraction Process

General Options

Process Name: Purchase Invoices
Template Set: ID_AP_Invoices

Folder Options

Watch Folder Path: C:\Irvine_Data\WatchFolders\AP_Invoices
File Sort: None

Allowed File Types: TIFF, TIF, PDF
Add

Parse Sub-Folders

OK Cancel

File Extraction Process Editor

File Extraction Process Editor
This page is used to edit the File Extraction Process

General Options

Pre-Processing Options

- Force TIFF Conversion
- Convert Office Documents
- Remove Blank Pages
Noise: 0.001
- Auto-Rotate
 Skip First Page
Confidence Threshold: 0.3
- Deskew
- Remove Color
- Sharpen
- Median Filter
- Detect DocRecord Cover Sheets
- Read DocRecord Job Info

Processing Options

- Skip OCR and Zone Processing

Processing Mode: Review_On_Problem
Reviewers

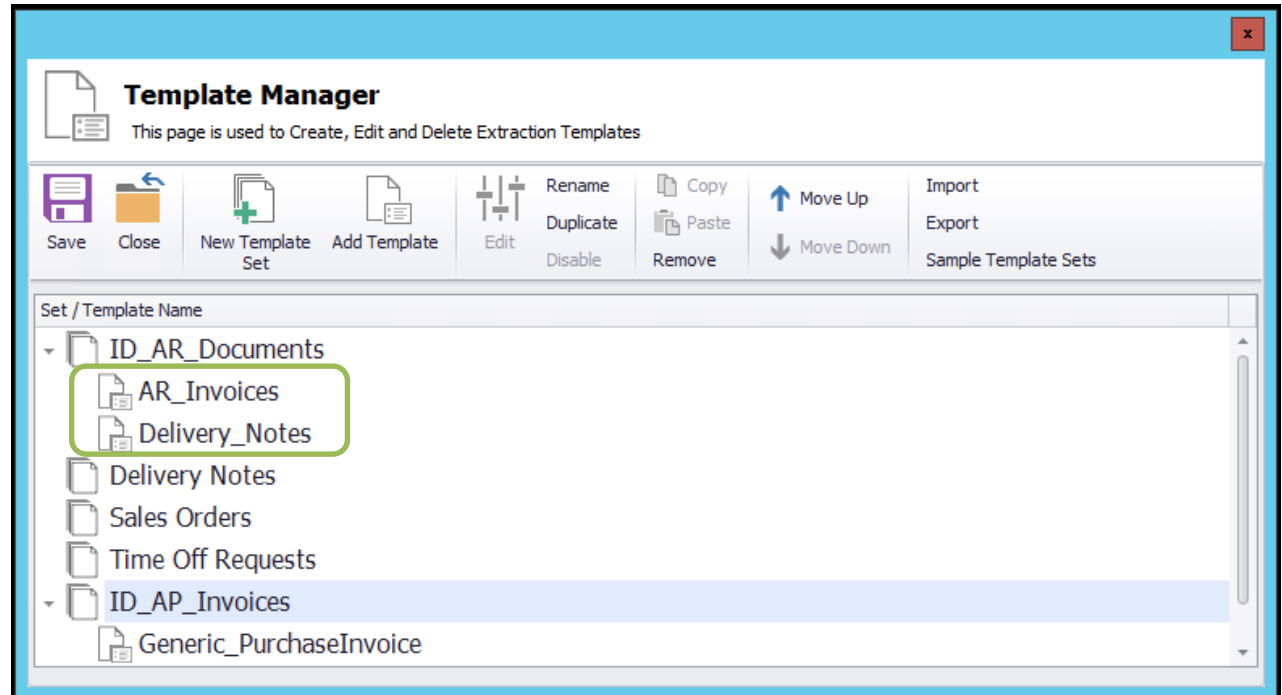
OK Cancel

Prism Capture

Add unlimited 'Template Sets'



- Handles mixed batches
- Batch separation
- Easily set validation rules to recognise & apply the correct template



Create Templates

The screenshot displays the Prism Capture Template Editor window, titled "Template Editor (Generic_PurchaseInvoice)". The interface includes a menu bar with "Main" and "Zoom" options, and a toolbar with icons for "Apply", "Close", "Add Zone", "Edit", "Duplicate Zone", "Delete", "Detect Zones", "Sample File", and "Create Variant". The main workspace is divided into two panes: "Zone Editor" and "Data Connectors".

The "Zone Editor" pane shows a preview of an invoice template for "Happy Baker Corporate Catering Services". The invoice details include:

- Happy Baker**
Corporate Catering Services
68 - 70 High Street
Oxford OX3 8GH
Tel: 01865 345865
Fax: 01865 345866
- INVOICE**
Date: 12 November 2016
Reference: 20262003
Customer order no: 29690

The invoice also features two address sections:

Invoice address	Delivery address
Irvine Data Ltd Irvine House 101 Golden Acre Leeds LS1 1GA	As invoice address

At the bottom of the invoice preview is a table of services:

Services / good provided	Quantity	Cost	Total
Finger buffet for training sessions	2	£175.00	£350.00
Refreshments at lunch & intervals	1	£110.00	£110.00

The "Data Connectors" pane on the right, titled "Zone List", displays a list of extracted data fields:

- vatNumber: "678542097"
- invoiceNumber: "20267003"
- invoiceDate: "2016-11-17"
- orderNumber: "29690"
- netTotal: "460.00"
- vatTotal: "92.00"
- totalAmount: "552.00"

A red-bordered box with the text "Unlimited 'Zones'" is overlaid on the Zone List pane.

At the bottom of the window, the status bar indicates: "Width 8.270833in, Height 11.69792in, Bits 24, Noise 0.05262".

Zone Types

- Standard - fixed or anchored zone for extracting data
- Barcode - fixed or anchored zone for reading barcodes
- Column - line item extraction zones
- PDF Field - pdf form field data extraction
- Clone – duplicate zone
- Anchor - searches page, column or row for specific text
- SMART – advanced zone type for ultimate flexibility

The screenshot shows the 'Zone Settings' dialog box with the 'General' tab selected. The dialog is used to configure Data Correction Settings. It includes fields for 'Zone Name' (Invoice Number) and 'Zone Type' (Smart). There are checkboxes for 'Data Field', 'Always OCR', 'Template Trigger', and 'Use in Template Validation'. A 'Validation' dropdown is set to 'Normal'. Below these is a table of triggers:

Trigger Text	Detection Val...	Value Position	Data Type	Multiline	Search	Preset Value
Reference:	False	Right	ItemNumber	False	Top-Down	
invoice #	False	Right	ItemNumber	False	Top-Down	
inv #:	False	Right	ItemNumber	False	Top-Down	

At the bottom, there are two text boxes: 'Raw OCR Value' containing '1 20267003' and 'Corrected Value' containing '1 20267003'. The 'Corrected Value' text is highlighted in green. Buttons for 'Add Trigger', 'Remove', 'Move Up', 'Move Down', 'OK', and 'Cancel' are also visible.

Zone Settings

Zone Settings

General | Correction | Validation | Post-Process Validation

General

This page is used to configure the Data Correction Settings

Zone Info

Zone Name: ProductName

Zone Type: Column

Data Field Always OCR Override Template Action

Template Trigger

Use in Template Validation Normal

Master Column

Link to Master: [Dropdown] Row Height: 1 Review Column Alignment: Left

Enable Masking Mask Char: [Dropdown]

Enable Anchoring Anchor Zone: ProductNameTrigger

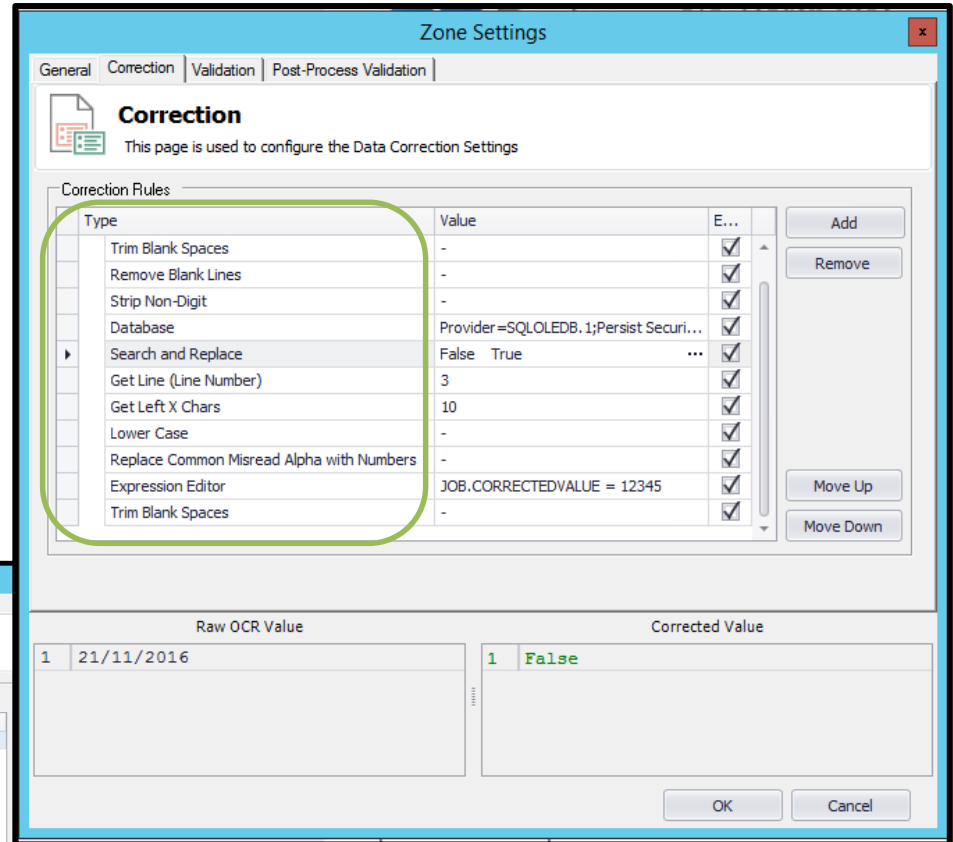
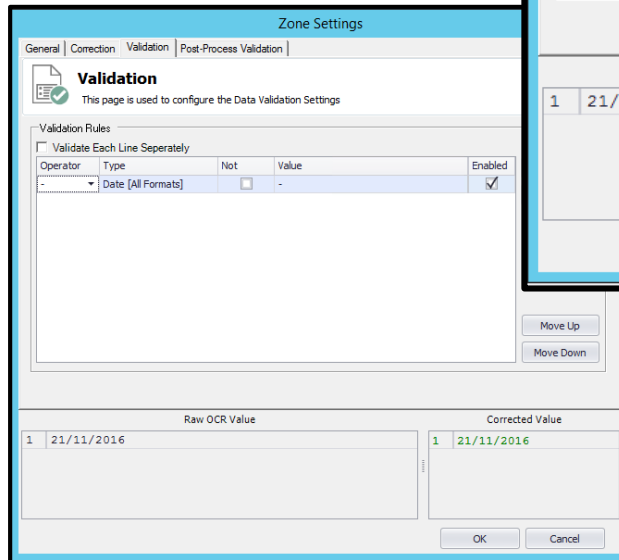
	Raw OCR Value	Corrected Value
1	Windows XP Home	1 Windows XP Home
2	Windows 8 Enterprise	2 Windows 8 Enterprise
3	Stapler	3 Stapler
4	Wide Format Paper	4 Wide Format Paper

OK Cancel

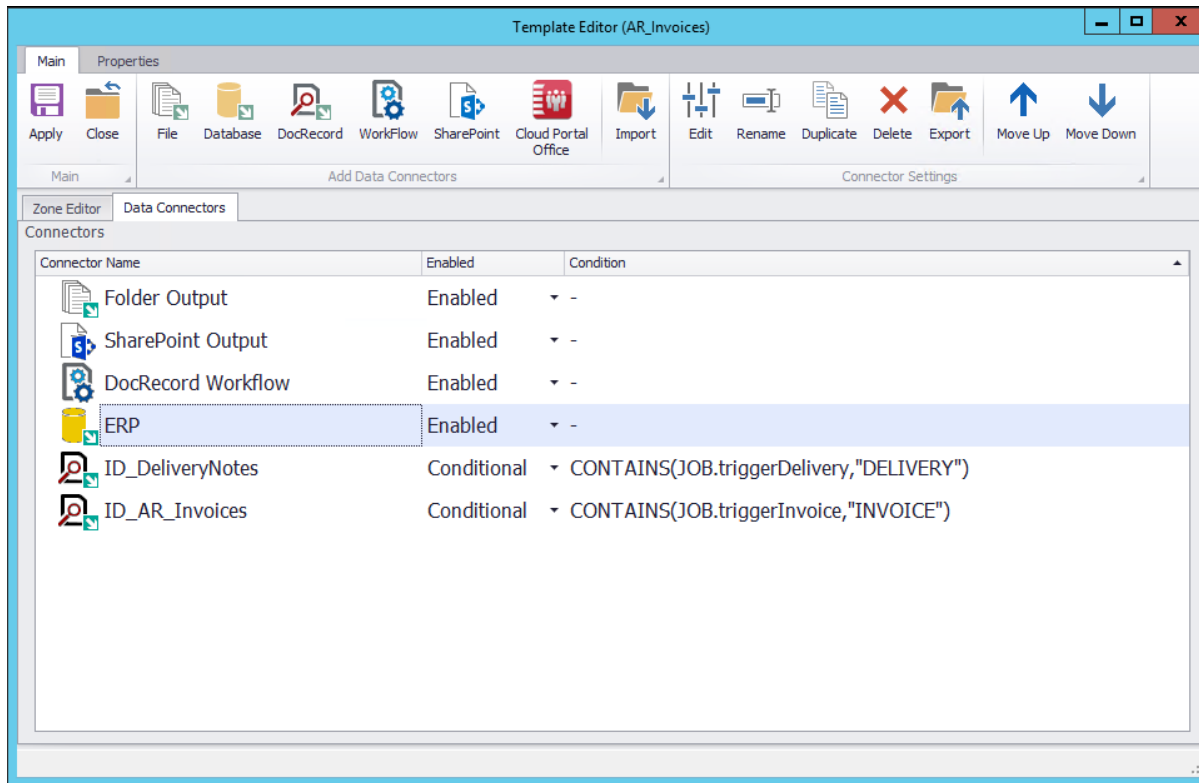
- General – configure the properties e.g. template action
- Template Actions - Start or End document, Cover Sheet, Attach page or skip page
- Correction – configure rules to correct or adjust the zone data
- Validation – configure rules to validate the zone data
- Post-Process Validation – configure additional rules to validate the data after the template has been processed

Simple Configuration

- Powerful pre-configured common expressions
- Or write your own expressions
- Available for use in correction, validation etc



Output Connectors



- Output to one or more destinations
- Output file and / or data
- Conditional outputs

Connector Configuration

File Data Connector
This page manage and modify and settings for this data connector

Data Format | Data Preview | File Settings

```
<?xml version="1.0"?>
<Document>
<invoiceNumber>12301</invoiceNumber>
<invoiceDate>2016-11-21</invoiceDate>
<orderNumber>P023421</orderNumber>
<accountNumber>R0BCO</accountNumber>
<dateAdded>08/02/2017 15:02:35</dateAdded>
</Document>
```

Sample preview with no test required

Show Field Names | Show Data

File Data Connector
This page manage and modify and settings for this data connector

Data Format | Data Preview | File Settings

Formatting

Data Format: XML
Data Delimiter: CSV
Other: Wrap data in quotes
 Add Record Header

XML Header: <?xml version="1.0"?>

XML Root Node: Document Use XML Attributes

Fields

Field Name	Map Type	Value
invoiceNumber	Zone	invoiceNumber
invoiceDate	Zone	invoiceDate
orderNumber	Zone	orderNumber
accountNumber	Zone	accountNumber
accountManager	Database	Provider=SQLOLEDB.1;Persist Security...
dateAdded	Text	CURDATETIME()

Output Variables

Var Name	Map Type	Value
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Set output data and file format

File Data Connector
This page manage and modify and settings for this data connector

Data Format | Data Preview | File Settings

Output Document File

Document File

Document Folder Path: C:\ & JOB.accountN
Document Filename: JOB.invoiceNumber
Document File Format: PDF (searchable)

Only Output Document File

Data File

Data Folder Path:
Data Filename:
File Extension: .xml

Same as Document Folder Path
 Same as Document Filename
 Append Multiple Records to same file
 Replace

Configure document and data file output

Prism Capture

Making it Easy: Import and Export



- Includes all input process, template sets, individual templates, and output connectors
- Design and build on one server and export/import to another
- Design advanced data extraction templates in the PRISM WorkPath desktop application and export them to the server

Checking & Verification

Fully integrates with PRISM WorkPath which includes a 'Reviewer' enabling users to review extracted data

- Re-order pages

The screenshot shows the 'Reviewer' application window. The toolbar at the top includes buttons for Close, Refresh, Commit, Delete Set, Remove Page, and Export File, along with navigation and zoom controls. The left sidebar shows a file tree under 'Accounts Payable' with two PDF files. The main content area displays an invoice for 'Happy Baker' with the following details:

Happy Baker
Corporate Catering Services
68 - 70 High Street
Oxford OX3 8GH
Tel: 01865 345865
Fax: 01865 345866

INVOICE
Date: 17 November 2016
Reference: 20267003
Customer order no: 29690

Invoice address	Delivery address
Irvine Data Ltd Irvine House 101 Golden Acre Leeds LS1 1GA	As invoice address

Services / good provided	Quantity	Cost	Total
Finger buffet for training sessions	2	£175.00	£350.00
Refreshments at lunch & intervals	1	£110.00	£110.00

Sub-total: £460.00
VAT @ 20%: £92.00
Amount due: £552.00

Payment in full required within 7 days.
Payment instructions:
Cheques to the Happy Baker – or by BACS to Lloyds Bank, sort code 50-10-68, account 01977289

The Happy Baker | 68-70 High Street, Oxford OX3 8GH | VAT registration number 678 542 097

The 'Index Fields' panel on the right lists the following fields:

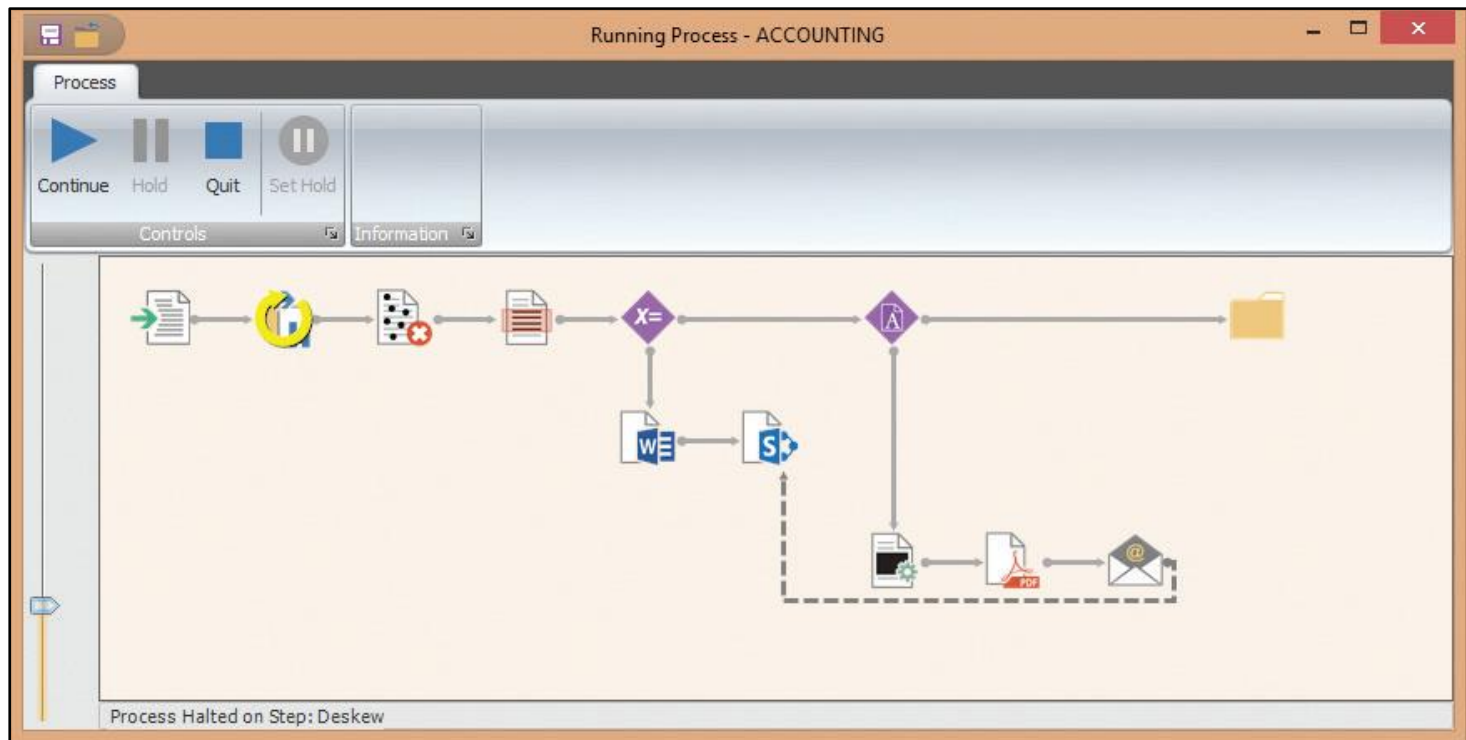
- vatNumber: 678542097
- invoiceNumber: 20267003
- invoiceDate: 2016-11-17
- orderNumber: 29690
- netTotal: 460.00
- vatTotal: 92.00
- totalAmount: 552.00

- Mouse-over any data on the page to auto-set index field data

Prism Capture

Integrated Workflow

Includes PRISM WorkPath Process Server for pre/post processing and fully automated processes



Try it for yourself

- Request trial
- Learn more
- Discuss a requirement



+44 (0)113 323 7405

info@altmanIM.com