Prism Capture

Advanced Data Capture with WorkFlow

ADVANCED CAPABILITIES

Automatically and intelligently extract data from scanned and electronic documents

Organisations often manually enter data from paper and electronic documents into their accounting, ERP, and other applications. These efforts can be time consuming 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 effectively capturing, extracting, and presenting data from these documents.

Prism Capture also features a powerful workflow capability that enables automated processing of extracted data and documents. Prism Capture is substantially lower cost and easy to implement and use. This means you can measure ROI in weeks and not months or years.
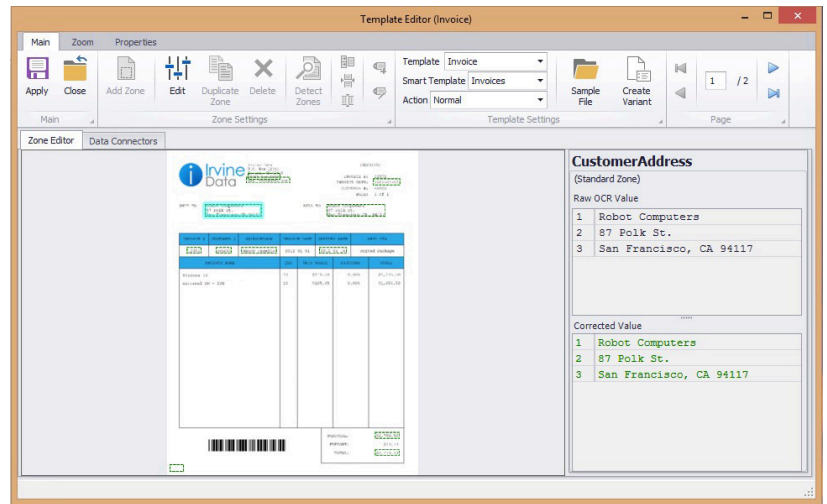
prism
software

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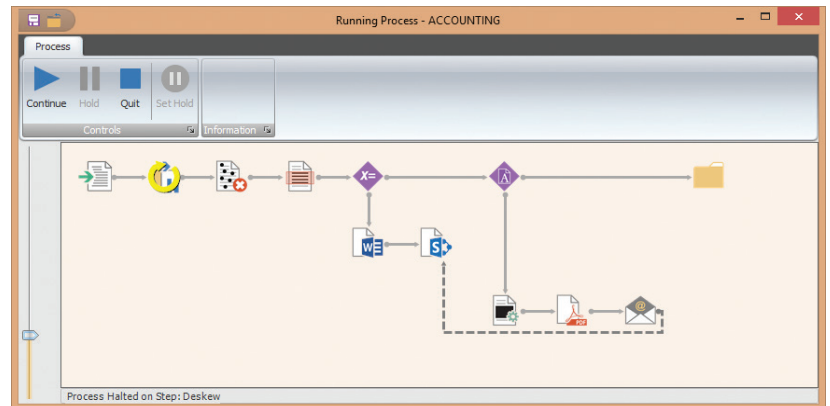
The extracted data is then automatically sent to a line-of-business (LOB) application, SharePoint, network folder, or presented to a user for verification through Prism WorkPath.

Unlike other data capture and extraction applications, Prism Capture's document templates are intuitively easy to build by the end users. Users simply select a document and set up areas from which data is to be extracted. These 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.
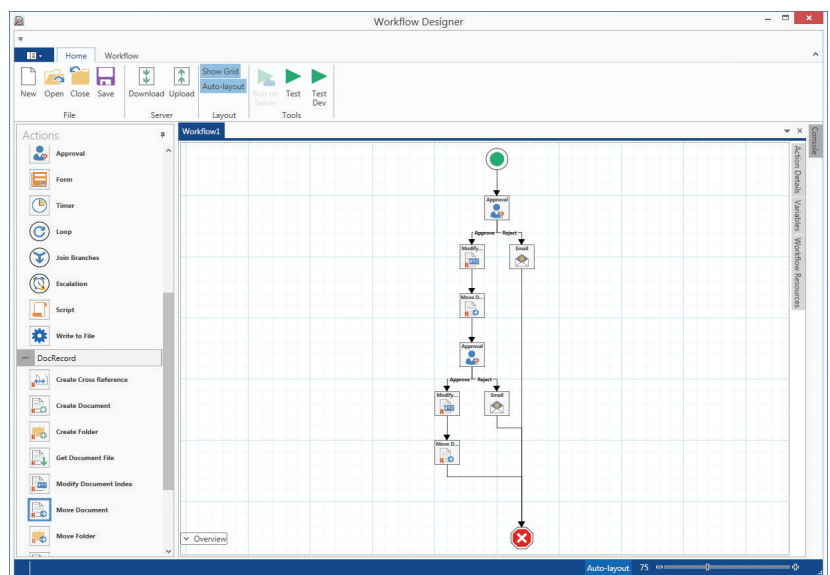
Prism Capture can automatically convert documents to Word, Excel, and searchable PDFs. It also has connectors for output to file (XML, CSV, and Excel), database, DocRecord, and SharePoint. Through Prism WorkPath's FastLink feature, a link can be quickly built to route Prism Capture output to a LOB application.

Data fields are automatically identified and extracted with Smart Templates.

Easily and quickly build workflows for pre-processing of documents

Create powerful workflows for post-processing of extracted data and documents

PRISM CAPTURE IS EASIER AND MORE POWERFUL TO USE. START USING IT IN MINUTES RATHER THAN HOURS OR DAYS AS WITH OTHER APPLICATIONS.

Prism Capture is different from Other Capture & Extraction Tools

Unlike other data capture and extraction applications, Prism Capture is much easier to both set up and use. The differences include:

- » Integrated workflow
- » Lower cost
- » Much easier to both set up and use
- » Intuitive user interface
- » Two user data extraction methods: "Smart Template" & Standard Template
- » Easy to train for template modifications
- » Utilises Prism WorkPath's powerful workflow & document processing automation
- » Can be quickly configured to third party LOB application

Document & Data Recognition

Prism Capture can automatically recognise the document and extract its data by different methods: automatically through a "Smart Template" look-up of keywords and values or a standard template.

Integrated Workflow

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

The first workflow capability for document pre-processing 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 the two methods, it can be automatically compared to database information to check accuracy and consistencies. Any data that is questionable will be highlighted for the user to check and then correct, if necessary.

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

Click Indexing

For users of Prism Capture, it's important to quickly and efficiently edit unrecognised and incorrect extracted data from a document. Click Indexing allows the user to quickly and easily edit this data by simply selecting the metadata field that needs to be modified and then move the mouse over the preview of the document.

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 both the need for the user to type in the missing data and data entry errors.
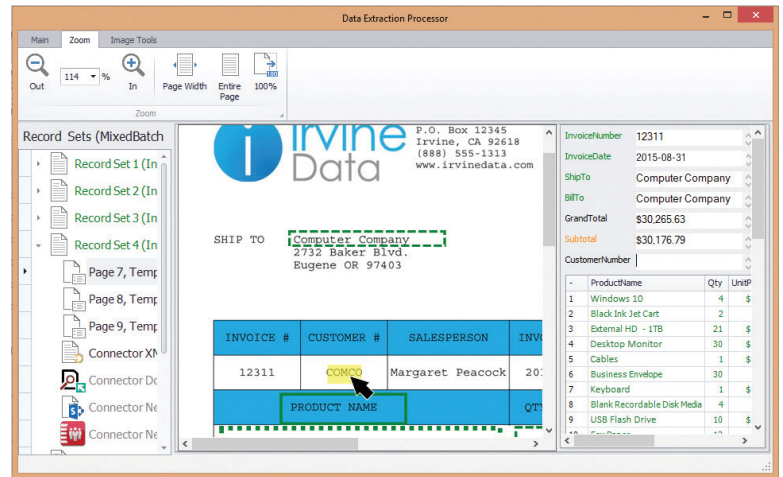
Smart Templates

Smart Templates allow document information (metadata) to be automatically and dynamically recognised 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 for 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 pre-built rules that examine and correct the data. These pre-built rules eliminate the need for users to build their own validation and correction rules. This allows users to become quickly productive with their data extraction requirements.

Simply mouse-over any text on the page and the metadata is automatically set.

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 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 enterprise content management application (ECM). 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 low cost, stand-alone application for advanced and automated 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. WorkPath also has its own workflow capabilities enabling automated processing from the desktop.

Before Prism Capture: 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 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 Prism Capture: 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.

Some documents may require workflow from the desktop once the data is extracted from Prism Capture and then routed to WorkPath. An example of this is when the extracted data has been reviewed at WorkPath and now needs to be sent to a LOB application while the original document, along with different metadata, needs to be archived in another application. Additionally, notifications might need to be sent to others informing them that this document has been processed.

FOR ALL TYPES OF DOCUMENTS

» Medical claims
» Sales orders
» A/P & A/R document automation
» New hire onboarding
» Mortage & loan documents
» Forms & electronic data submission
» Health records

INDUSTRIES

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◎ Healthcare
◎ Legal
◎ Education
◎ Government
◎ Banking & Finance
◎ Insurance
◎ Retail
◎ Accounting
◎ Operations
◎ HR
◎ Sales

With Prism WorkPath, it's easy to build such an automated workflow at the desktop to perform these tasks. Multiple workflows can be easily set up for many different types of documents allowing unique and custom processing.

Automatically Create Searchable PDFs from Both Applications

Both Prism Capture and WorkPath can create searchable PDFs. 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 applications, including SharePoint.

ABOUT PRISM WORKPATH

Prism WorkPath is a very low cost and powerful desktop document processing engine and provides a wide range of features including:

» 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

» 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 customised 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.

Send Documents Automatically to DocRecord

Prism WorkPath allows you to check documents directly out of and into DocRecord, Prism's award-winning enterprise 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 Online 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.

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