

**opentext™**

eBOOK

# Transform documents into actionable business insight

OpenText Intelligent Capture  
provides the foundation for  
your digital transformation



## Content

<b>Capture is the foundation of information management</b>	<b>3</b>	<b>Enterprise capture</b>	<b>10</b>
Capturing information improves productivity	4	High-value use cases within an organization	10
A solution that provides the foundation for tomorrow	5	<b>Distributed and mobile capture</b>	<b>11</b>
Move to digital without starting over	5	High-value use cases within an organization	11
Match the investment to the vision	6	<b>Choosing the right product</b>	<b>12</b>
<b>Finding the right solution</b>	<b>7</b>	<b>OpenText Intelligent Capture</b>	<b>13</b>
<b>Batch process capture</b>	<b>8</b>	<b>OpenText Intelligent Capture Advanced Recognition</b>	<b>14</b>
High-value use cases within an organization	8	<b>OpenText Vendor Invoice Management for SAP Solutions</b>	<b>15</b>
<b>Advanced capture</b>	<b>9</b>	<b>OpenText LiquidOffice</b>	<b>16</b>
High-value use cases within an organization	9	<b>OpenText Core Capture</b>	<b>17</b>
Proven ROI	9		

## Capture is the foundation of information management

Despite so many advances in technology and automation, the promise of a totally paperless business is not yet reality. Many enterprises still manage key processes, including records management, on paper. According to an AIIM survey, one of the top three reasons organizations continue to use paper is a “lack of understanding of paper-free options.”<sup>1</sup> This includes what capture technologies do beyond connecting the scanner to a Content Services or line of business application.

This eBook discusses how capture technologies can facilitate digital transformation and how organizations can take advantage of OpenText’s portfolio of intelligent capture products.

Capture solutions automate scanning and capture and produce metadata along with an image file and/or OCR text. This information is migrated to an Enterprise Content Management system, allowing a search of the assets based on the metadata and viewing it using document imaging software.

OpenText has a focused portfolio of products that turn paper into digital content and extend powerful capture capabilities throughout an organization for centralized high-volume capture, mobile capture or remote scanning for remote offices and customers.

## Starting on the right foot: Capture the right information at the beginning



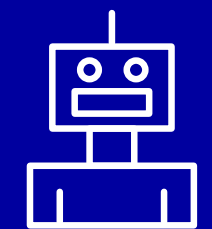
You cannot manage what you do not understand



Metadata is the foundation for process automation, information governance, findability, context, routing and security



Manually classifying documents and applying metadata is time-consuming and error prone



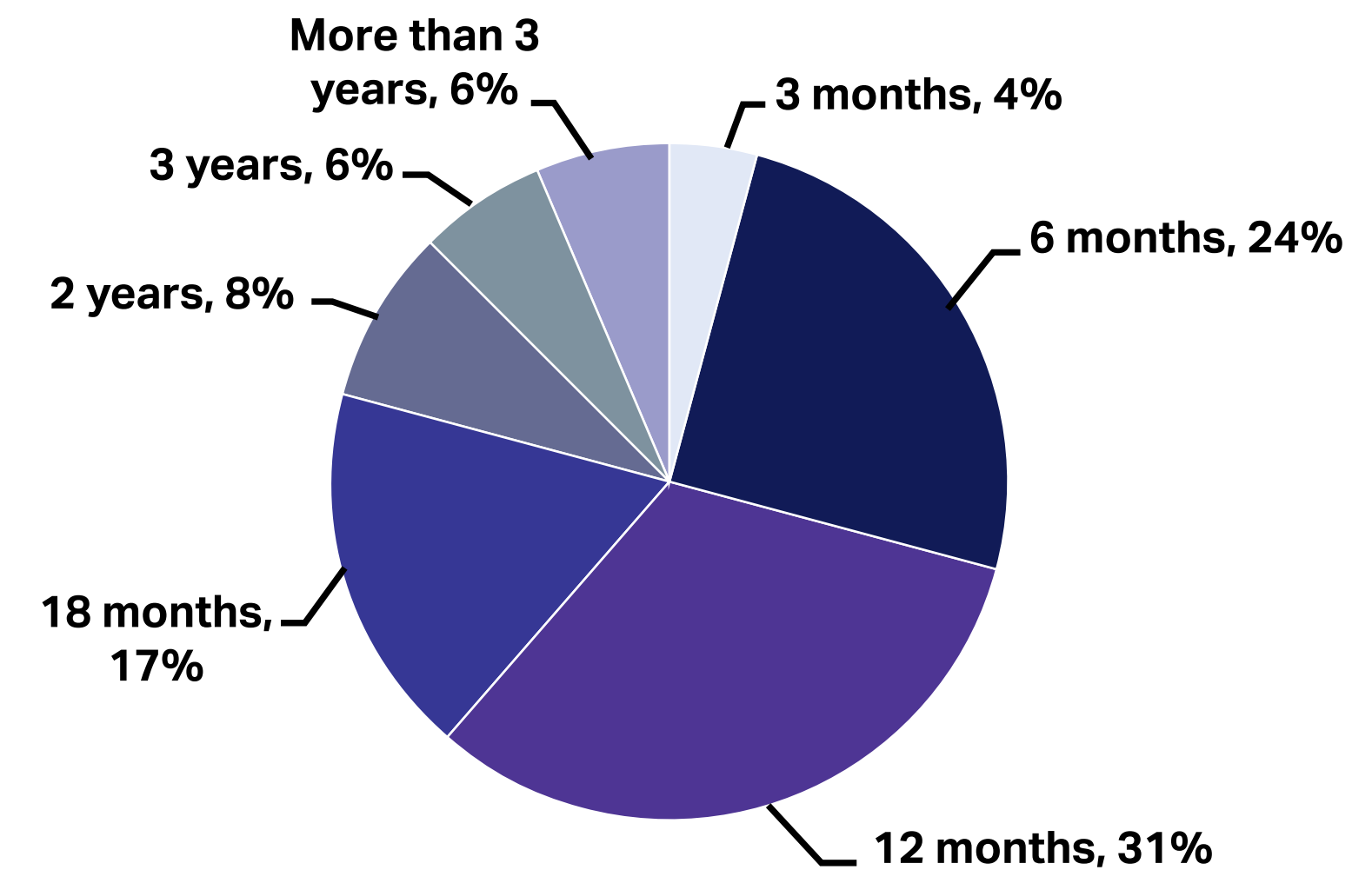
Automating the capture and application of metadata is the first step in good information governance and the first step in many business processes

## Capturing information improves productivity

An AIIM survey of nearly 30,000 CFOs, found that capturing information from invoices can increase employee productivity by more than four times.<sup>2</sup> Simply scanning and applying optical character recognition (OCR) technology limits disruption during digital transformation, improves findability and enhances security of valuable documents.

In the same AIIM survey, more than 30 percent of respondents noted that their offices are “piled high with paper and are (still based on) paper based processes.” In addition, 40 percent said “most of our important stuff is referenced and filed as paper.”<sup>3</sup> According to a recent Gartner analysis, the evidence is clear that paper is still a major impediment to any digital transformation effort as a knowledge worker still prints an average of 400 pages per month.<sup>4</sup>

Overall, what would you say has generally been the payback period for those paper-free process projects? (N=139, excl. 102 don't knows)



## Proven results

Using a combination of OpenText Content Services capture and technologies, Eaton Vance, one of the oldest investment management firms in the United States, increased its number of new account openings by 24 percent in a period of six months—largely because the average time to open a new account was reduced by 26 percent. An incorporated audit trail has enabled Eaton Vance to save an average of 1.5 days per account for regulatory and audit due diligence.

## A solution that provides the foundation for tomorrow

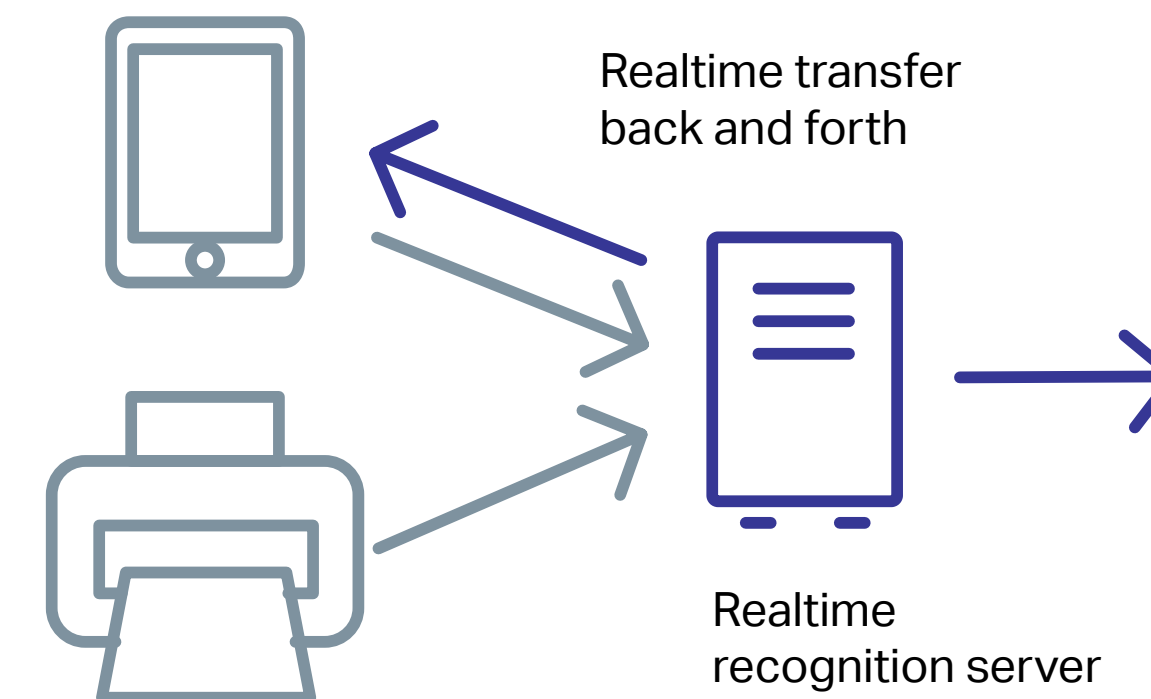
Capture reduces paper usage and manual labor, improves tracking and auditing of document usage (which contributes to compliance with regulations), enhances searchability, automates processes, reduces physical storage requirements and enriches data quality. In addition to the initial 12-month ROI, most enterprises expect a three- to five-year window of use out of software purchases. Capture technologies provide value over the three- to five-year window by delivering flexibility in all aspects, including types of endpoints, user interfaces and an expandable catalogue of file types.

## Move to digital without starting over

In the age of digital transformation, there is an increased demand for distributed and mobile capture, as well as realtime recognition.

These elements enable the capture of documents closer to the point of origin, as well as offer more immediate data capture. This helps speed the time of a paper-based transaction so it can be turned around with the same efficiency as an electronic transaction.

OpenText™ Intelligent Capture provides features beyond scan support and integration into back-end systems. It offers powerful processing tools that extract information from documents via OCR and can even be used as part of validation or indexing services. These types of tools do not just provide value when dealing with paper, but also PDFs and digital image types. When organizations invest in an OpenText capture tool, they can find value in the technology, even without paper as a driver.



Co-classification of paper and digital-born documents is the foundation of any information management strategy.

This requires intelligence in the capture solution that can recognize elements of both paper and digital documents.

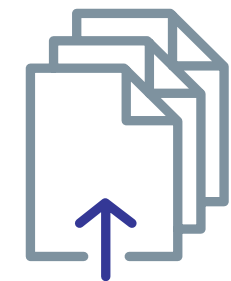
## Match the investment to the vision

Capture is not a one-size-fits-all scenario. Different enterprises have different needs that influence top priorities.

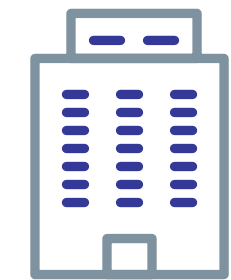
The top three value features include:



**1. Batch capture.** Manages the scanning of large stacks of documents (and/or ingestion of electronic images from various sources, such as email, PDF and fax servers). As part of automated batch processing, organizations should prioritize out-of-the-box tools for cleaning up images, separating the batches into individual documents and indexing. This provides streamlined, automated ingestion of large volumes for digital storage.



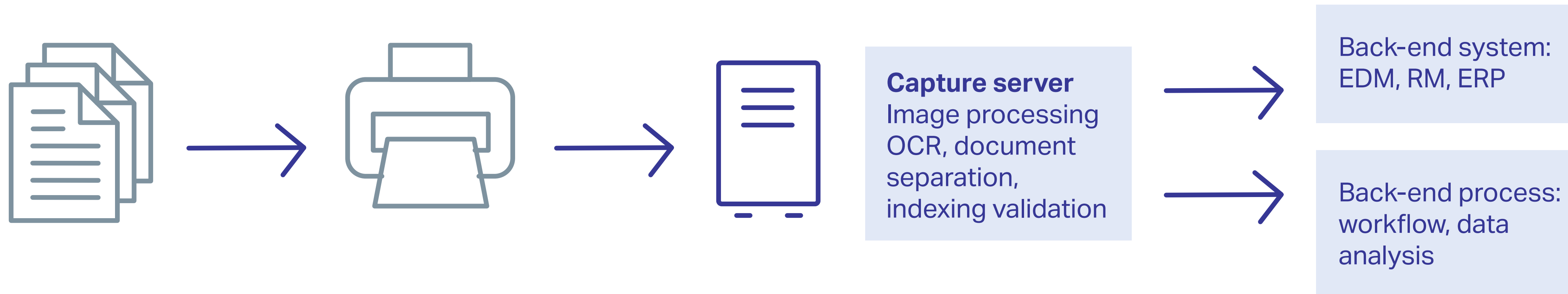
**2. Automated classification and data extraction.** Separates and indexes documents with complex auto-classification of documents and extraction of data from fields. Organizations prioritize tools that integrate with existing



**3. Enterprise-ready capability.** Enables IT and business stakeholders to control and ingest content from any location, anytime and with complete control of access. Organizations prioritize tools that support both distributed (for example, multiple geographic locations) and mobile capture scenarios and integrate with third-party systems via connectors. A software development kit (SDK) ensures that organizations have the flexibility to integrate capture securely into any internal or external capture point, including websites, desktop applications and back-end systems.

## Finding the right solution

Enterprises of all sizes benefit from adding a capture solution to their Content Services portfolio. Organizations must understand which features best complement existing solutions to ensure they have a product that meets their needs.



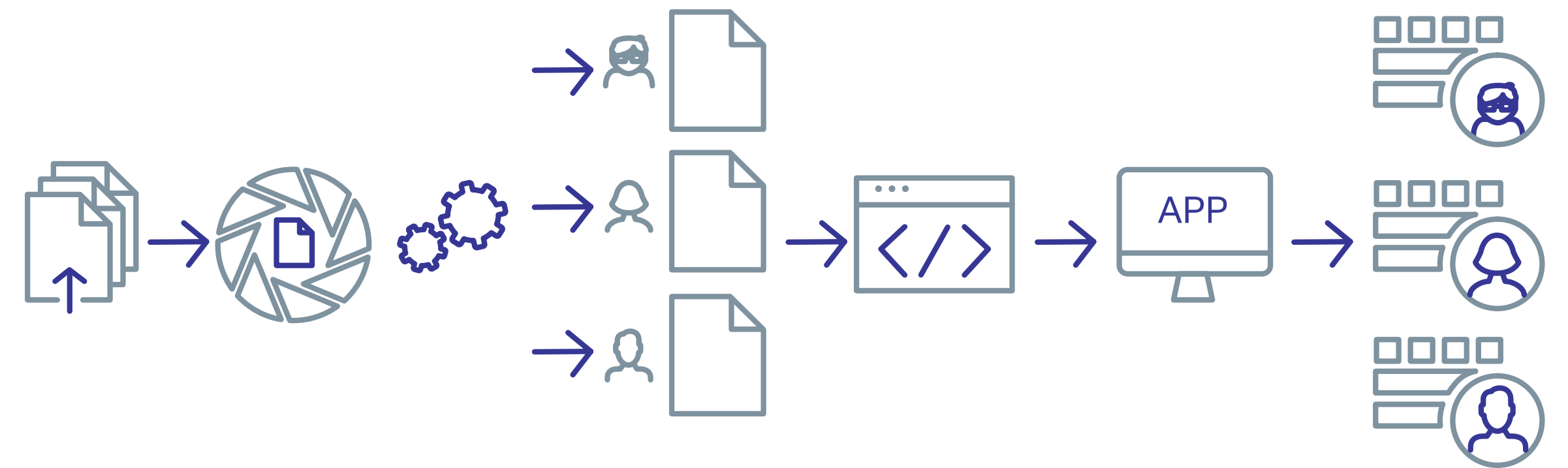
Capture technology (as shown above) has several key features that enable core capture categories, including batch capture, advanced capture, mobile and distributed capture, as well as enterprise readiness. Each of these capture categories requires different features and supports a variety of high-value use cases. This section will walk you through the features and use cases for each category.

## Batch process capture

With batch process capture, the user can convert a stack of documents into images with associated indexing information. The batch then moves via workflow or API to the enterprise's Content Services system. The steps for batch process capture include scanning and importing images, image processing, document separation, applying OCR for creating full-text searchable PDFs and/or for automated indexing, field-based data capture, data and image validation and verification and release to a back-end process.

### High-value use cases within an organization:

1. Onboarding multiple new employees
2. Back-file conversion
3. Asset certification (e.g., X-ray machines, vehicle insurance)
4. Employee certification via external services (OSHA, diplomas, continuing education)
5. Meeting management (municipal, ad hoc board of directors' meetings)

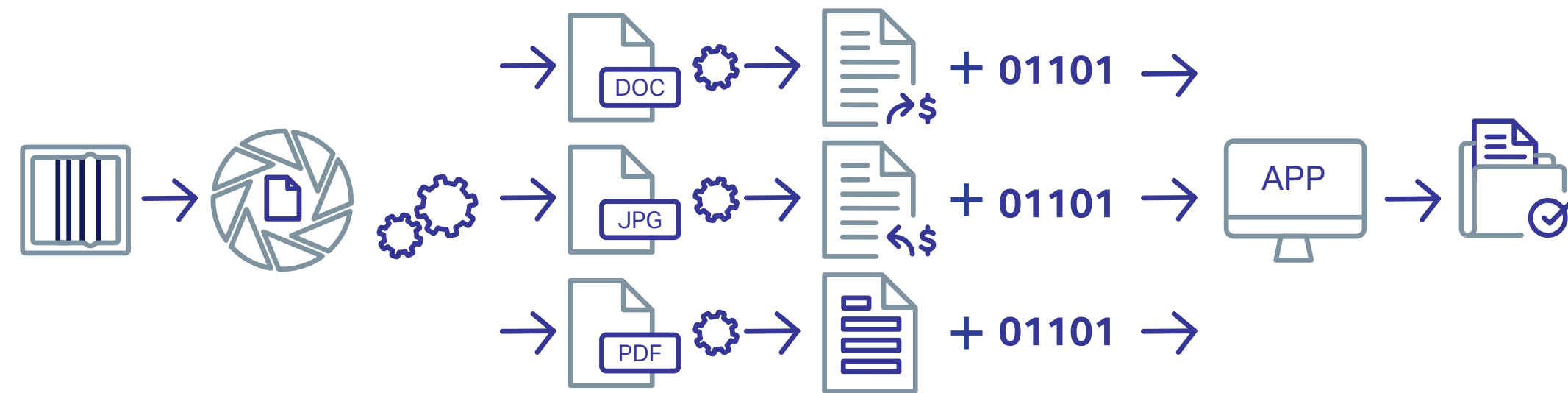


The primary ROI of batch process capture is the ability to apply a simple index to ensure document readiness without manual intervention. This reduces cost and time investment of underwriting, onboarding and other processes that require ingestion of large volumes of documents from external sources.



## Advanced capture

Advanced capture includes such features as the auto-classification of documents and extraction of data from variably structured documents. It proves valuable for a single file containing multiple document types, such as mortgages, tax forms and medical records. It is also ideal for forms-based content, such as invoices or contracts, which often contain similar information with different layouts.



### High-value use cases within an organization:

1. Identifying and applying universal attributes to documents for multi-department use (e.g., employee benefits)
2. Customer service management (e.g., customer onboarding, invoicing)
3. Employee compliance activities (e.g., proof of activities, expenses)
4. Asset valuations (e.g., property surveys, recording architectural changes, facilities management)
5. Digital mailroom for single line-of-business (e.g., mortgage file creation, vendor contract management)

## Proven ROI

Sympany uses OpenText advanced capture technologies to increase customer satisfaction and reduce operating costs. This allowed Sympany to decrease customer service wait time and move key planning initiatives forward due to greater visibility into both internal and customer processes. “Thanks to the OpenText solution, the processing time for services has been halved. This has enabled us to achieve a significant increase in customer satisfaction,” said Rosario Mascaro, IT application manager of ECM at Sympany.

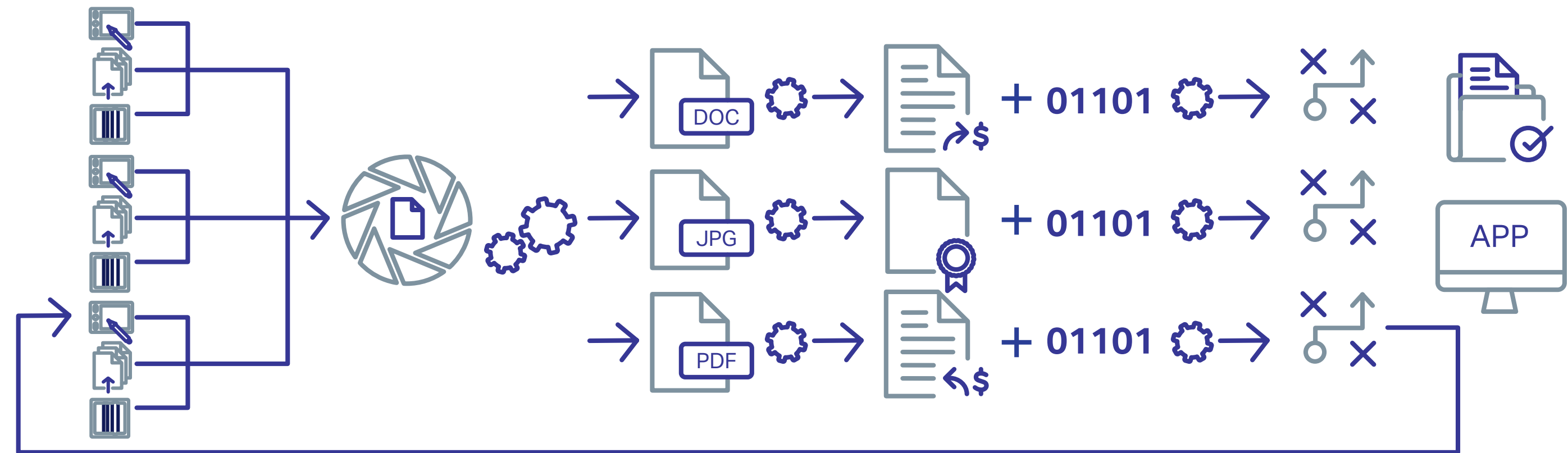
Note: For enterprises that have standardized on SAP, OpenText™ Vendor Invoice Management for SAP® Solutions is a pre-built advanced capture solution for efficiently moving invoices into an SAP system.

## Enterprise capture

Enterprise capture enables an organization to take the capabilities of advance and batch capture processes and spread them across multiple departments and applications. In highly regulated industries, there can be certain compliance requirements. Insurance companies typically have a high volume of claims and healthcare organizations must deal with medical records. An enterprise capture application can design, execute and manage all requirements. It can offer intuitive process design tools, run on distributed servers, divide work evenly among multiple employees and processors, offer insight with detailed operations analytics and deliver data and images to multiple back-end systems and processes.

### High-value use cases within an organization:

1. Multi-site digital mailroom
2. Shared services for multiple lines of business
3. Secure processing of sensitive client documents (digitization of patient records, pharmacy records)



4. High-volume client request processing (insurance claims, mortgage processing)
5. Complicated compliance needs (multi-site clinical trials, perishable distribution)

A typical organization could benefit from document capture in multiple departments, including Human Resources, Accounts Payable, Legal and many more, depending on the specifics of the business and its market.

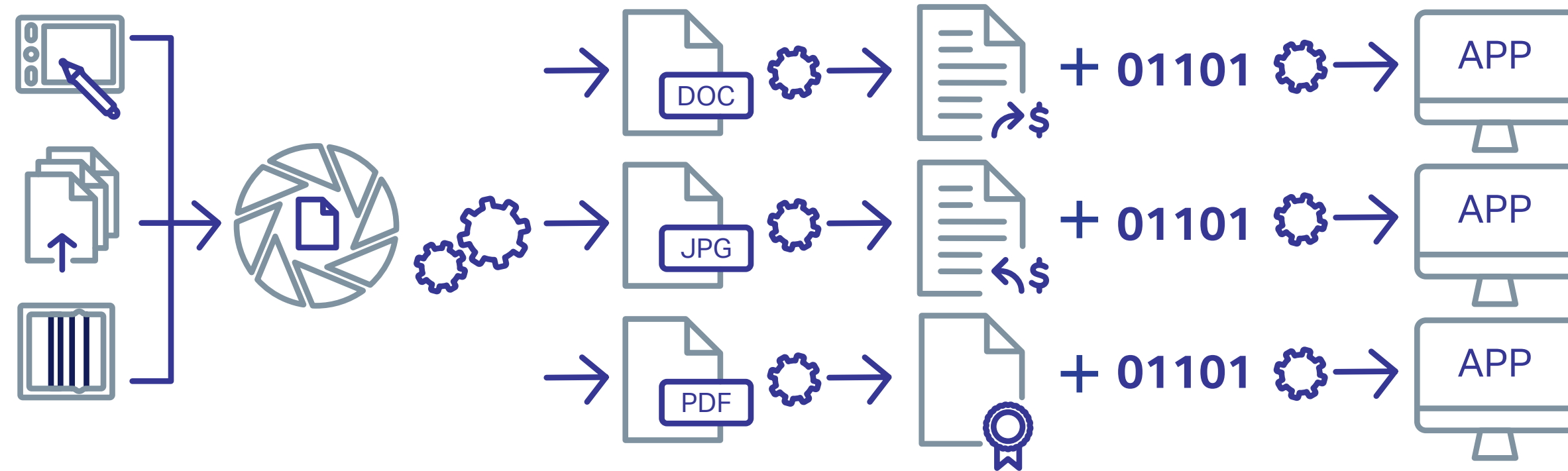
### An enterprise implementation

An OpenText enterprise capture solution has been transformational for Minnesota Revenue, letting

the agency expand its electronic processing of business and personal tax returns, vouchers and check payments. Minnesota has seen measurable gains, including reducing voucher exceptions from 64 to three, decreasing overall service time by 40 percent for deposits and freeing up agency staff from manually processing more than 800 document types. “We believe we have established a blueprint for electronic tax return processing that other tax types and agencies can leverage, including revenue agencies in other states,” said Cyndi Rowley, former Revenue Tax Operations division director.

## Distributed and mobile capture

Distributed capture allows enterprises with multiple offices to standardize capture operations. The processing remains with a central authority, which ensures repeatable processing, indexing and routing. This allows users with the most knowledge to add context at the time of entry. Mobile capture goes hand in hand with distributed capture, as field workers and mobile services standardize on tablets and smartphones as the principal devices for capturing information.



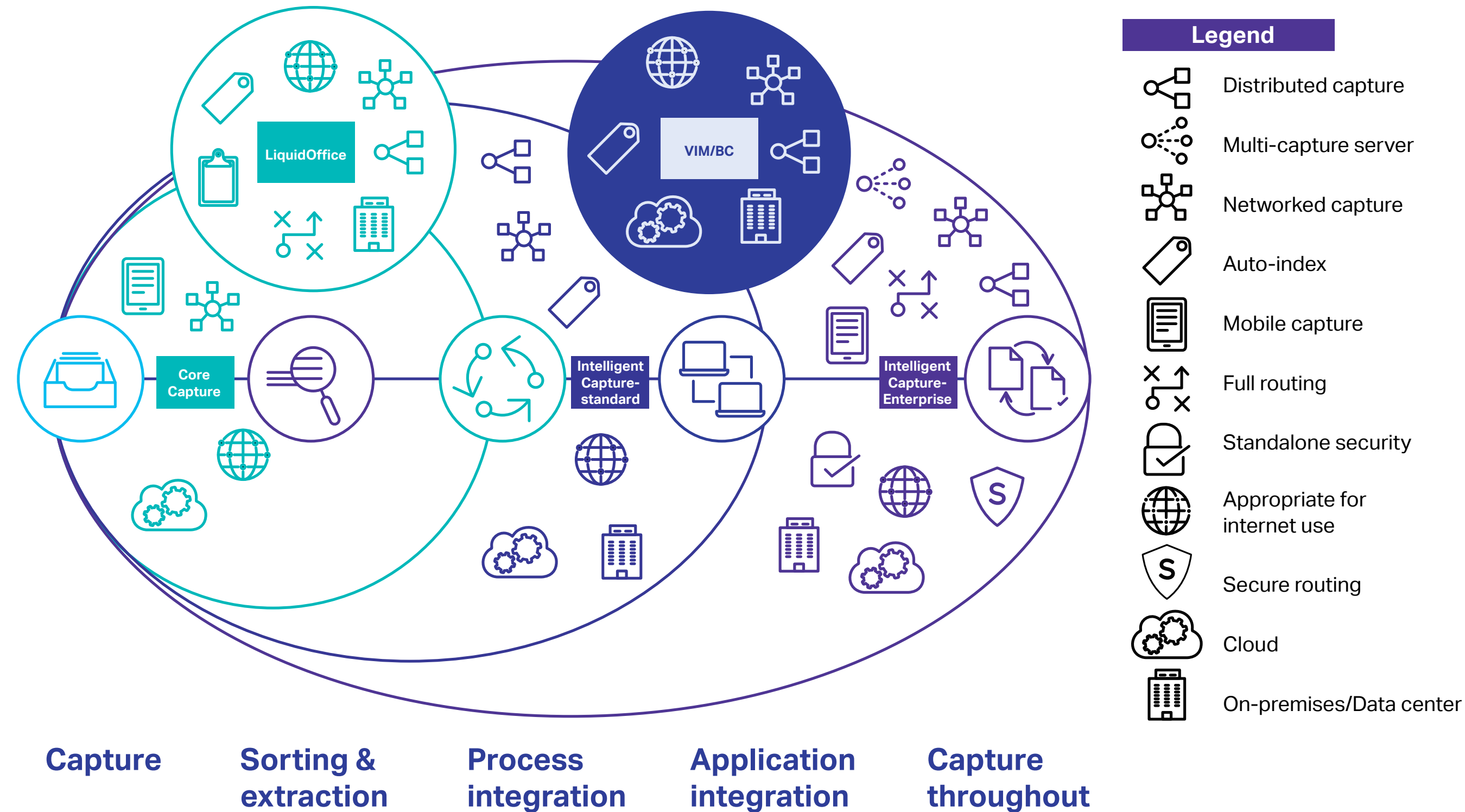
### High-value use cases within an organization:

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The primary ROI is increased efficiency of processes started remotely or across multiple geographic offices.

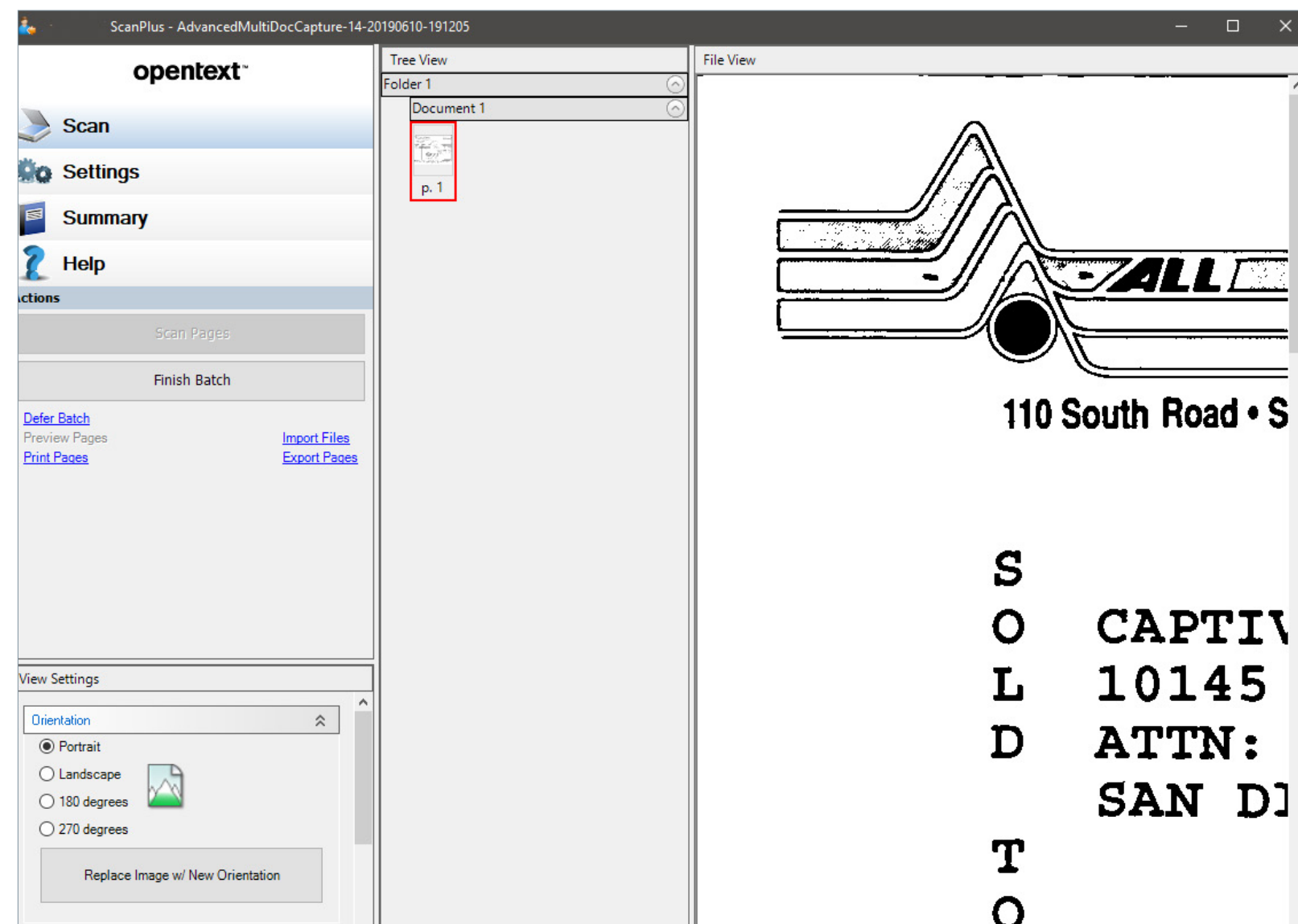
## Choosing the right product

Capture is a process, not a single step. This includes not only the ingestion of the initial document, but also the sorting, routing and movement of documents and extracted metadata into line-of-business applications. This can include capture of documents during an ongoing process, allowing users to act based on all the necessary information. The best way for an organization to choose the right product is to determine its use case.



## OpenText Intelligent Capture standard edition

Intelligent Capture standard edition includes the most advanced document and character recognition capabilities available to turn documents into machine-readable information. It classifies documents and extracts the data “stored” in scanned images and faxes, interpreting it using OCR, ICR, IDR, adaptive reading and other technologies. Intelligent Capture reduces manual keying and paper handling, accelerates business processing, improves data quality and saves money.



### Benefits:

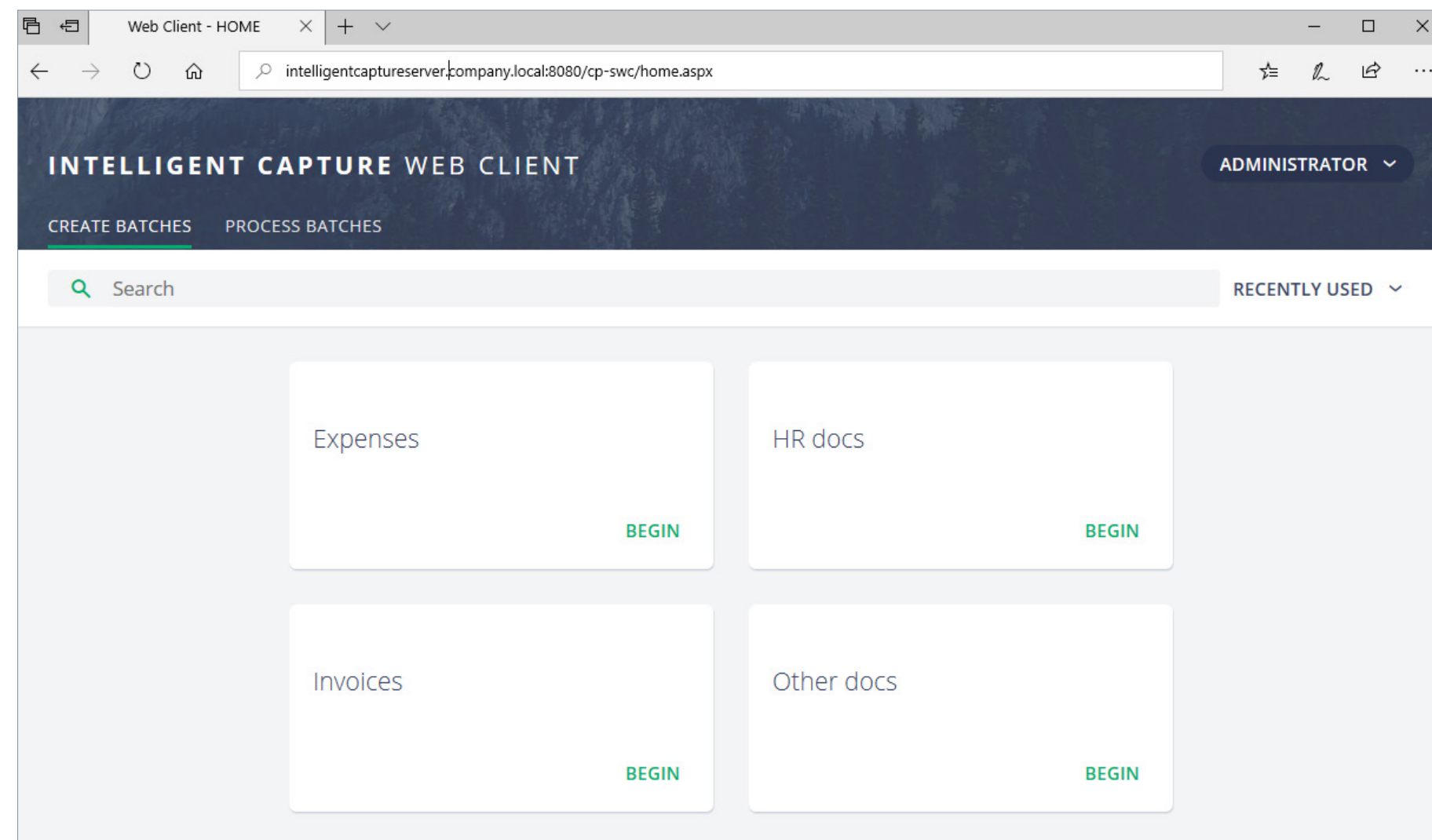
- Increase accuracy
- Improve compliance
- Harness advanced technology
- Minimize integration effort

### Document-based capture platform

- Transforms today’s slow, manual business processes into automated digital processes
- Ensures rapid time to value with quick setup and simplified configuration
- Integrates seamlessly with mission-critical business applications

## OpenText Intelligent Capture enterprise bundle

Intelligent Capture enterprise bundle is an enterprise-strength, process-driven capture software platform that converts documents, both physical and electronic, into application-ready, digital content. It transforms documents captured from any source into actionable digital information that combines with business systems to automate critical processes. OpenText differentiates with a proven ability to meet the most demanding capture requirements.



### Benefits:

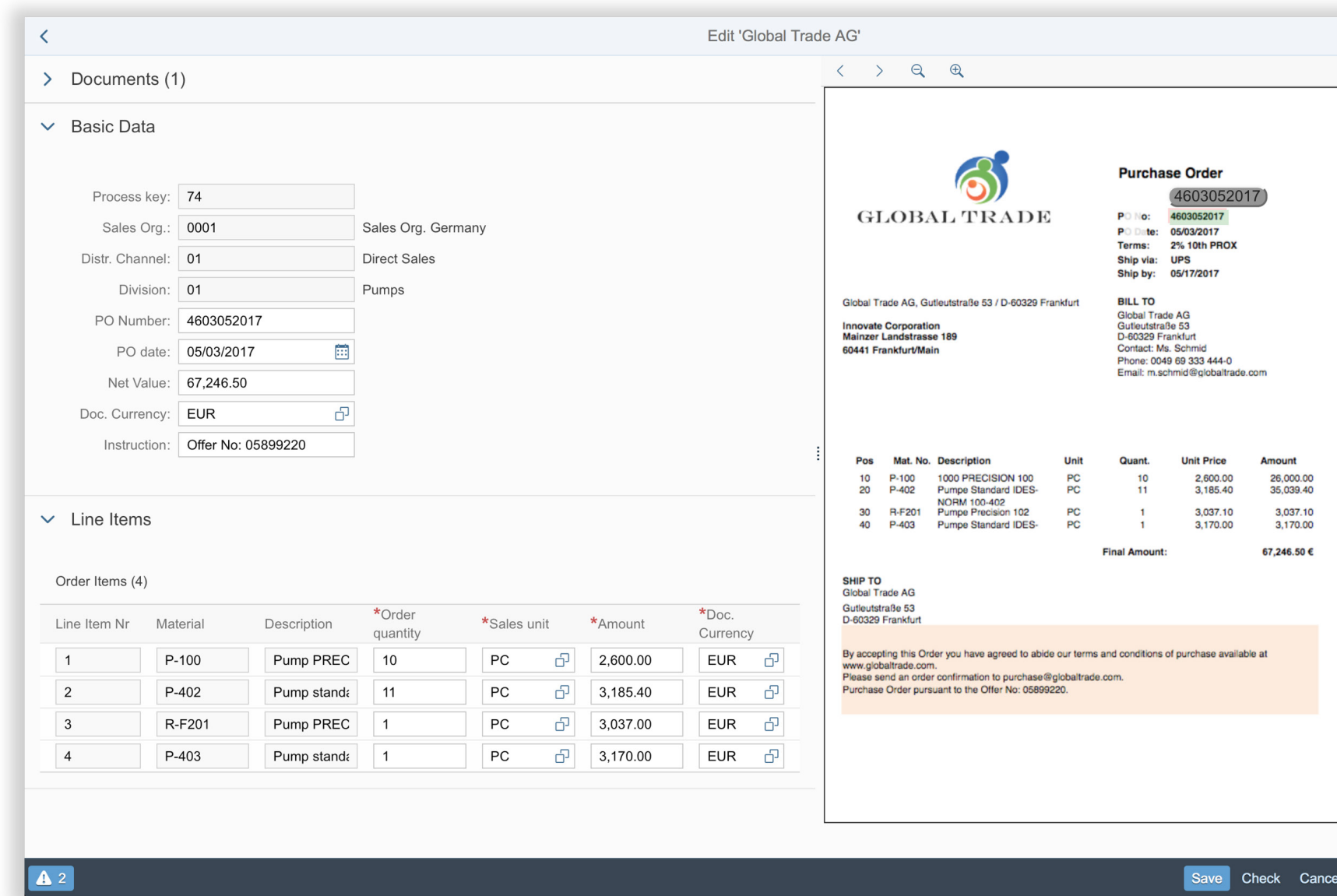
- Accelerate critical business processes
- Increase accuracy
- Improve compliance
- Support digital transformation initiatives

### Enterprise process initiation platform

- Transforms paper documents into actionable digital information
- Supports solutions across the enterprise with a single platform, including Human Resources, Accounts Payable and business process outsourcing managing multiple client systems
- Enables fast setup with graphical configuration via the capture flow designer
- Ensures support for the most demanding capture requirements with multiple server clustering
- Integrates seamlessly with mission-critical business applications to ensure information is available as part of processes

## OpenText Vendor Invoice Management

OpenText™ Vendor Invoice Management for SAP® Solutions optimizes and simplifies the process of receiving, managing, routing and monitoring invoices and related documentation. Stakeholders quickly and efficiently access invoice information, such as the relevant PO number and status of the invoice payment. This digital transformation results in shorter approval cycles and faster payments.



### Benefits

- Accelerate AP operations via integration with SAP Business Suite and SAP S/4HANA®
- Boost productivity by automating invoice processing
- Ensure accurate, on-time financial reporting
- Promote regulatory compliance with a well-managed, standardized process

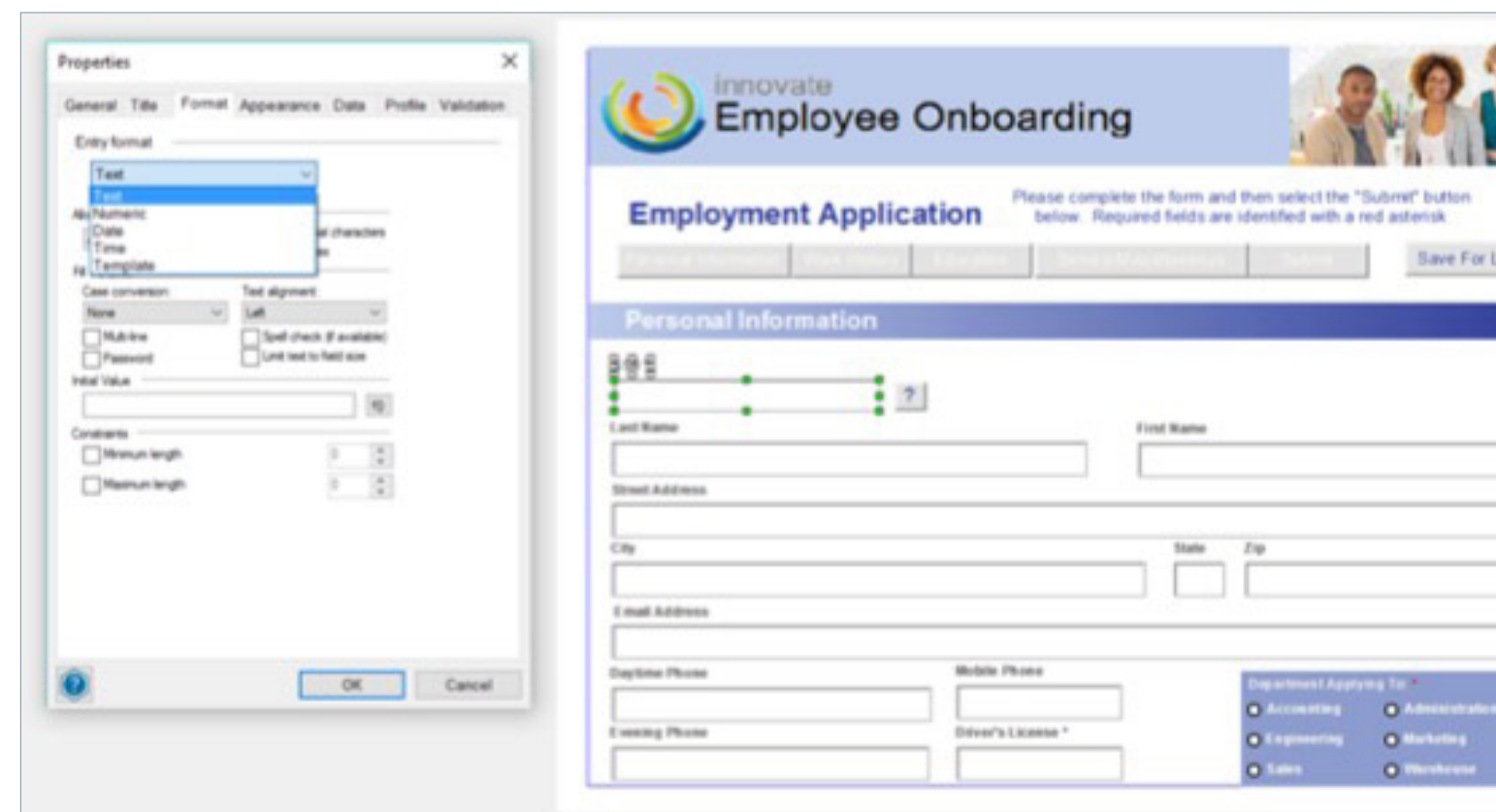
### SAP-centric capture solutions

- Adds document capture services to SAP business systems
- Addresses challenges related to receiving, managing, routing and monitoring invoices and related documentation
- Ensures rapid time to value with fast setup and simplified configuration
- Integrates seamlessly with SAP Business Suite and SAP S/4HANA

## OpenText LiquidOffice

OpenText™ LiquidOffice™ is an intelligent forms automation solution that enables organizations to automate document and forms-driven processes using electronic forms and workflow capabilities for improved efficiency, control and customer satisfaction.

It dramatically increases productivity by routing forms and information for review and assembling all the information needed to make quick decisions.



### Benefits

- Simple yet powerful eForms design
- Rapid, anytime, anywhere access to eForms
- Seamless integration with OpenText™ TeleForm™ for a comprehensive intelligent forms automation solution
- Fast implementation and time to value

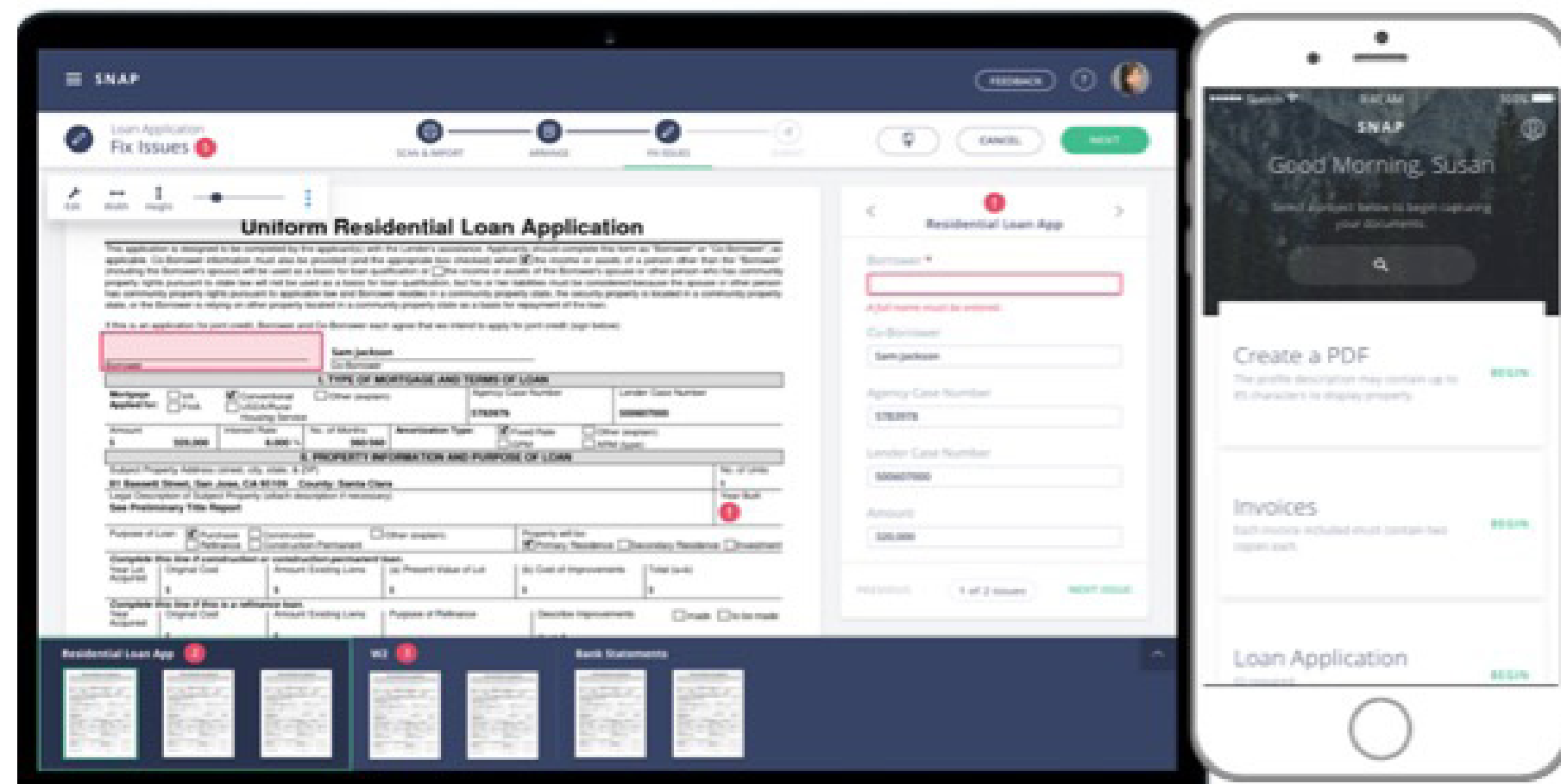
### Structured forms processing solutions

- Automates workflows related to structured forms
- Requires structured forms processing only
- Processes electronic forms automatically



## OpenText Core Capture

OpenText™ Core Capture is a lightweight, public-cloud app that helps turn stacks of paper into digital information. Before documents can be brought into a system of record, it is essential that they are sorted and categorized effectively. Core Capture makes it easy to track progress, guiding users through the capture process with contextual messaging and an efficient interface to quickly find and fix OCR and business rule exceptions.



### Benefits

- No need to install software on local clients
- Realtime categorization automatically captures and organizes documents, eliminating the need to sort documents by hand
- Intuitive user interface is easy to use, even for first-time users

### Ad hoc, distributed capture

- Enables ad hoc, non-dedicated capture tool requirements
- Offers SaaS, public-cloud based capture
- Includes optional add-on for other OpenText capture solutions to extend distributed capture requirements



### About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit [opentext.com](https://www.opentext.com).

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