



Dynamic Document Capture



Most business transactions rely on the circulation of documents between the various parties involved. In the conventional process, data contained in these documents — whether in electronic or in paper format — needs to be manually keyed into enterprise information systems. Manual approval workflow is often required, adding even more time and risks of human error to the process. Esker DeliveryWare Dynamic Document Capture (DDC) module allows companies to quickly streamline business processes, improve accuracy and even grow their business by removing inefficient manual data entry steps. DDC allows managers to improve Key Performance Indicators (KPI), comply with corporate governance rules and regulatory requirements, manage authorised information and gain visibility into the entire process.



1. Capture

With DDC, data contained in incoming business documents such as sales orders and invoices can be captured from any document format or media. The solution is packaged with default rules specifically designed for each type of business document.

2. Read

The DeliveryWare engine and the DDC module work hand-in-hand to extract relevant document header, footer and line item information regardless of document layout or number of pages. The validity of the extracted data is automatically cross-checked according to predefined scenarios, and against your company databases when necessary. This additional business intelligence and logic ensures that accuracy of the capture does not only rely on OCR technology to manage documents such as scanned or faxed images.

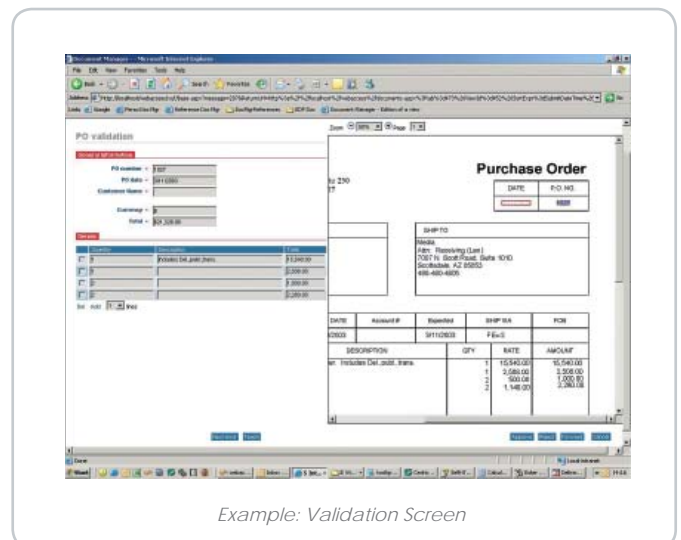
3. Verify/Approve

Once the data is automatically captured, users are presented with a simple interface to double-check correct recognition of the data. Users can compare data extraction against the displayed image of the original document.

Additionally, the interface displays warning and errors messages next to the captured fields whenever it is necessary to draw the user's attention to identified or potential issues.

For example, the application will let an order processing clerk know when a new customer has been detected or if a possible duplicate document has been identified.

When this stage is complete, the user will have the choice to save for later processing, approve, reject or even forward the validation to another user.



4. Load Data and Document

Once the information is correct, it can be made available to other applications — together with the original document image — and used to create new business documents if required.

Features Highlight

DDC is built on patented business rule technology developed by Esker. The solution allows intuitive rule customisation via a server-based graphical interface.

Intelligent data extraction

DDC uses OCR and ICR technologies to read information contained in image files whether they have been scanned or have arrived by fax.

Additionally, the module uses logic, keywords, relative positions and business rules to allow the Esker DeliveryWare document management solution to extract relevant document data. In a sales order scenario, the system automatically extracts the customer name and ship-to address, document date, number and total as well as line item quantity, description and amount, etc. All information necessary to complete the sales order processing is captured directly from the document, regardless of its location within the document.

Data capture accuracy check

The system automatically verifies that captured data is valid for the document by performing field or cross-field checks. For example, the extraction can be matched against a constant value, an interval or a list of values to verify that the total of each line balances the general total of the document.

When the system detects that the extracted value does not match the defined rule, an error message will appear above the invalid data in the validation interface.

Preconfigured business rules

Esker DeliveryWare comes with out-of-the-box preconfigured rules for sales order and accounts payable automation. These rules can be customised according to your specific company process requirements.

KEY BENEFITS

- Remove slow and risky paper handling from business processes
- Eliminate error-prone manual data entry
- Improve process efficiency based on KPI
- Save time and money associated with document archiving and retrieval
- Cost-effectively help CFOs support and enhance ongoing regulatory compliance efforts

Database lookup

Esker DeliveryWare is able to connect to enterprise databases to cross-check that extracted data is valid, accurate and complete. When additional information such as internal company IDs is necessary to process the document, the data can be directly taken from its storage location.

Browser-based verification, completion and approval workflow

The solution allows users to verify data extraction side-by-side with the original image within a browser based application. At this step this user will be able to complete the captured information with additional required information not contained in the document, such as an internal tracking number or ID. The application also supports out-of-office management, web form validation forward, and multi-level approval workflow.

Auto-learning capabilities

The system is able to learn new document layout and specifics on an ongoing basis, continually improving its recognition and extraction capabilities over time. Available to power users or system administrators via the browserbased "teaching" interface, this feature enables the system to become more efficient the more it is used.

Integration with ERP and other systems

After data has gone through the verification and approval process, it is made available in the desired format, together with the original document image, for further processing by your ERP, SRM and/or other back-end systems.

Document tracking and monitoring

The system allows end-to-end document processing tracking and reporting, giving stakeholders' full visibility into the entire process — as well as the ability to identify and resolve bottlenecks.

Technical Specifications

Server Minimum Requirements	<ul style="list-style-type: none"> ▪ OS: Windows Server 2003 and 2008 (32 or 64 bit) ▪ CPU: 3 GHz ▪ RAM: 2 GB ▪ Microsoft .NET framework v3.5
Image Recognition	<ul style="list-style-type: none"> ▪ OCR, ICR, OMR and barcode support ▪ Support of 122 Latin, Greek, Cyrillic and Asian languages
Web Browser	<ul style="list-style-type: none"> ▪ Internet Explorer 6.0 or 7.0
SAP Release Level	<ul style="list-style-type: none"> ▪ From v4.6C and up