



## Introduction:

Each and every capture process involving paper has the same problem. How to reduce the cost of scanning and data entry?

With Square 9 Advanced Capture users now have the ability to compile many types of paper documents without separator sheets, place them into the scanner and have a technology not only classify but also intelligently extract non-templated OCR data contained within the document. Better yet while it classifies and extracts data, it also integrates to the SmartSearch document management system for storage at the same time as it feeds another line of business application for adjudication purposes.

## What is Advanced Capture?

- Square9 Advanced Capture is a platform for the development of applications for document classification and data extraction—leveraging best-of-breed technology solutions from Paradatac's Prosar-Aida, Captaris' DokuStar, and Kofax Transformations.
- Advanced Capture is an unstructured data capture product that can intelligently extract and classify documents using revolutionary artificial intelligence (AI) capabilities. This solution will allow between 70%-96% capture automation, meaning the percentage of documents that flow through Advanced Capture without the need to be manually corrected.
- Square9 Advanced Capture is the solution for the common capture problems that companies face when implementing document management—which is how to control the cost of capture and data entry.

- It can be used to tackle all kinds of input management tasks, regardless of whether the volume of documents is high or low, the workflow is straightforward or complex, the processing is central or distributed, or if the documents to be processed are structured or unstructured.

## Applicable Use Case Scenarios

Square 9 Advanced Capture can be used in many business applications but typically its used in a few specific verticals, namely: AP, healthcare, mortgage, media broadcasting and manufacturing.

- Automate AP invoice, EOB and sales order entry – capture sales orders from fax, mail, email or print and automate the process of classification, data entry as well as integration with internal line-of-business systems and document management archiving.
- Automate traffic instructions – media outlets like cable, radio and satellite receive large amounts of traffic instructions which tell the media provider which commercial to run, how long, on what station and at what frequency.
- Document classification and distribution in mail system.
- Extraction of business process-relevant data from documents.
- Capturing unstructured forms, surveys, assessments and exams.

## KEY POINTS

Reduce hard costs – FTE's, benefits, temp or part time works, office space

Reduce soft costs – productivity, efficiency related to processing paper

Non-template based

Solution can learn from mistakes

Supports table line-item data extraction

Supports page detection and separation

Seamless data output to most any line-of-business system

Supports ODBC data updates and logic

Reads all ODBC data into memory for fast processing

Solution can poll directory for files to process

Front end capture through Kofax Capture or Captiva Input Accel

Pre-packaged with AP Invoice and EOB rule trees

## TARGET MARKET

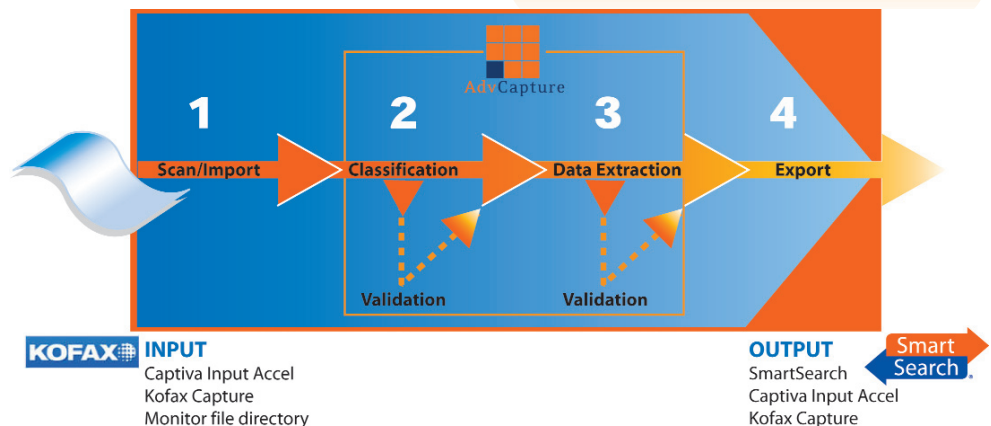
Healthcare

Accounts payable (AP)

Banks and mortgage lenders

Media outlets (TV, radio)

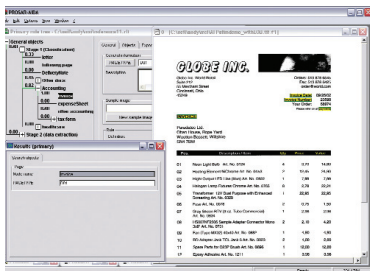
Manufacturing





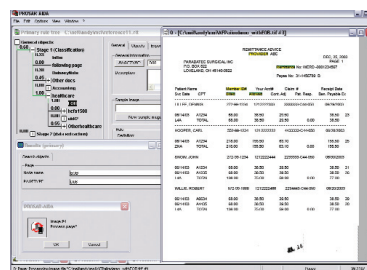
## Solution Workflow Classification and Data Extraction

- Advanced Capture is text recognition and analysis software based on artificial intelligence that can ascertain document types and classify images for appropriate routing and archival.
- The process begins with a high-speed and efficient full page OCR scan of each image. This first step allows Advanced Capture to search each and every word of every document to discover the document content.
- In order to classify the current document, Square9 Advanced Capture searches the document for tell-tale characteristics specified by the administrator using pattern matching, spatial relationships and synonyms like invoice number, invoice #, inv\_num, etc. These tend to be certain keywords or phrases



Classification is performed by keyword search from the OCR output. Spatial relationships between keywords as well as hierarchical classification allows thousands of types of documents to be captured and interpreted.

- This overall process of discovery is unique and makes Advanced Capture very different from the typical template based solutions. With other solutions the document content is expected and assumed to always appear in the same geographical areas.
- A significant advantage of Advanced Capture document content discovery method is its ability to process virtually unlimited number of versions and formats of particular document types.
- Advanced Capture is confidence based, meaning if the Advanced Capture engine does not have a high degree of confidence, the data value is flag and sent for correction within the data validation module.
- Since the Advanced Capture engine is transparent to the user, the only interaction the user has with the system is within the validation module, simply correcting values and rerouting them back into the process workflow.



The classification process behaves like a mail room person - rough sort first, then a finer sort. Leveraging "Following Page" detection, removes the need for separator sheets between documents and rules for detecting "following pages" are configurable.

## TARGET BUSINESS PROCESSES

EOB (explanation of benefits)

Insurance claims

HCFA

Invoices

Mortgage documents

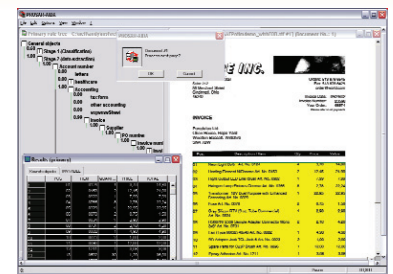
Traffic instructions

Applications

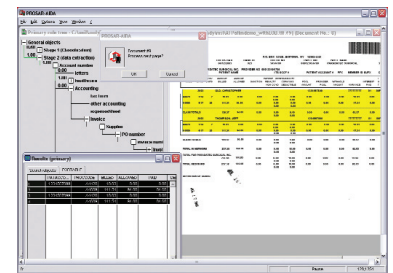
Hospital admitting forms

Remittance

Sales order processing



During the extraction process label-value pair logic is used to find data. Utilizing the extracted OCR, the solution finds all synonyms of a type like "invoice date", "inv date", "date". Then the artificial intelligence engine discovers the date that is spatially in the correct RELATIVE location to the label. Note - no fixed zones are used - anywhere!



Advanced Capture supports tabular data extraction for any type of document: EOB, invoice, traffic instructions or sales orders. Each type of document is processed same way, with no limit to the variety of layouts

