SUMMARY

Automated Indexing (11.0) brings OCR data extraction technology to OnBase. Predefined template forms, combined with an accurate and reliable OCR engine, provide the means to automatically classify and index scanned documents. Automating document indexing can eliminate the bottleneck associated with manually indexing high volumes of business documents. OCR based classification and indexing can be more reliable and much faster than manual data entry. Resources spend their time more effectively, validating or correcting questionable values only when needed, while letting the OCR engine perform the mundane task of document indexing.

KEY BENEFITS

- Reduces overall resource requirements needed for document indexing and classification.
- Improves document indexing accuracy and allows users to focus on exception processing and more valuable tasks.
- Enables faster document indexing reducing the traditional bottleneck caused by manual document indexing.
- Expedites entry of critical documents and data into your business transaction process.
- Eliminates the burden of additional applications, databases, and duplicate configuration, to perform data extraction.

BUSINESS APPLICATION

- Data Capture from Printed Forms – Index data can easily be lifted from structured documents like printed forms and applications that are filled out, printed and mailed to an organization. Since these documents have a predefined and static format, Automated Indexing can be used to completely automate the indexing process. Employees normally responsible for performing manual data entry to index the documents, simply review and correct values returned as suspect. They can also validate that other non-machine printed values such as signatures are complete on the documents.
- BOL Data Capture – Bills of Lading are scanned as they are received back from the shipping department. These BOLs have structured heading information on them, which is OCRred and automatically used to classify and index each document. If any value or character is determined to be questionable, it is queued for review where the operator can view the OOCRred value alongside the area of the page where the value was found. Documents can automatically move to a Workflow queue where they can be matched with their related Purchase Orders and Invoices for completion of the transaction.

DESIGN

OnBase Automated Indexing utilizes the OmniPage OCR engine SDK to automate document indexing. OCR forms are configured with image regions specific to document classification and keyword value assignment. Supports machine printed text (OCR), optical mark recognition (OMR), logo or image matching, and signature detection.

KEY FEATURES

- Simple drag and drop configuration with real time zone testing available from within the OnBase Client.
- Process an unlimited number of documents with no page-based processing limits.
- Assign many template forms to a single document type to accommodate forms from all business partners or vendors.
- Supports line item and table type data capture with placement into Multi-Instance Keyword Groups.
- Supports expanding and storing AutoFill Keyword Sets.
- Configurable character based confidence thresholds allow the processor to provide more scrutiny when required.
- Validation interface provides value to zone comparison, automatically zooming to configured zones on the page.
- Point and Shoot Indexing automatically OCRs selected zone, assisting users performing manual indexing.
- Create XML document renditions for integration or export with other business systems

SCREENSHOTS

Suspect values are highlighted during indexing. The document viewer zooms automatically to the configured zone.

Template configuration and testing is performed in the OnBase Client Imaging window