

OpenText Alchemy Productivity Suite

CAPTURE

MFP Capture

Alchemy and the Productivity Suite make it simple to capture documents from MFP devices along with any other device that is capable of outputting images to a network folder. Once the documents are picked up by Alchemy, they can be indexed and routed on to other users.

Single Click Entry

Among the new features in Alchemy is OpenText's patented Single Click Entry technology, which allows users to rapidly index a wide variety of documents without pre-defined OCR templates or the need to invest in costly advanced document capture solutions.

Users are guided through the indexing fields in their document by the Single Click Navigator, a small information box attached to their mouse cursor. The user points to the required information, clicks once, and Single Click Entry transfers the data to the appropriate index field for the document. Single Click Entry will auto-identify common data values such as phone numbers, street addresses, social security numbers along with any other value that can be defined using a regular expression.

Document splitting

The Productivity Suite is able to automatically separate documents based on a set of pre-defined rules. This will benefit users who are scanning batches or groups of documents by eliminating time-intensive manual document separation activities.

Documents can be split based on:

- The number of pages (e.g. the document is split after each page or every nth page)
- File name (e.g. the document is split each time a new file name is encountered)
- A value extracted by OCR (e.g. the document is split each time the OCR process captures a new keyword field such as "account number")
- XML data

Third-party database lookup

Documents can be indexed using metadata extracted from external SQL databases. This is particularly beneficial to organisations who are indexing documents that are related to records in ERP, CRM, Sales Management or other line-of-business systems. This method not only reduces the margin of error associated with manual or semi-manual indexing but also ensures that the indexing values are consistent with the target line-of-business system.



PROCESS MANAGEMENT

Document routing

Documents can be routed based on the value of specified keyword fields. For example, the keyword value "invoice amount" on an invoice can be evaluated and then transitioned to the "Approve Invoice" folder if the amount is less than £1,000 or to the "Manager Approval" folder if the amount is £2,000 or above.

By implementing document routing customers can easily establish simple, structured workflows that will automatically process documents based on a set of business rules while ensuring that key approval and decisions are taken by appropriate parties.

Document matching

Document matching (completeness check) is a highly valuable feature that enables document dependencies to be defined and checked. For instance, many companies only pay invoices when they are in receipt of the corresponding purchase order and packing slip. This ensures that the goods were approved for purchase to begin with and that the goods were delivered as specified.

In this scenario it is necessary to ensure that the purchase order and packing slip exist for a given purchase order. The document matching function specifies which folders and/or document types need to exist before the collection can be considered complete. Documents and/or folders are matched based on keyword values and an additional keyword field is created to display the match status (e.g. "complete" or "incomplete"). Once implemented, the match status can be viewed by opening the document itself or via a report generated by the Productivity Suite server which lists all incomplete document collections.

**For further information please contact ProcessFlows
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