

CHIEF BENEFITS

INTEGRATE PAPER AND ELECTRONIC PROCESSES – PaperVision Capture merges paper and electronic processes through one holistic solution. It enables organizations to capture structured and unstructured paper and electronic documents and route them into the corporate database or line-of-business applications for further processing.

UNIQUE AI DOCUMENT-PROCESSING MODULE – The optional PaperVision Forms Magic module delivers a groundbreaking document-classification engine driven by Digitech Systems’ patented artificial intelligence, and features the ability to “learn” the types of structured documents an organization receives and process them accordingly.

LESS MANUAL INTERVENTION – The solution has the intelligence to automate a myriad of tasks that can be handled by a computer, and to streamline tasks that require the operator’s attention. This will allow operators to focus on more customer-facing and revenue-generating tasks.

CUSTOMIZABLE FOR INCREASED EFFICIENCY – Administrators can incorporate custom code at any point to meet any capture/routing need. Administrators can assign priority levels for each step within each job, and the system will automatically process jobs based on their priority levels, freeing up the necessary resources to complete jobs as quickly and efficiently as possible.

COST-EFFICIENT PRICING MODEL – Unlike some leading capture solutions, PaperVision Capture is not priced according to the number of pages processed, so customers won’t be penalized the more they use it. And the platform’s modular design enables customers to purchase the features they need without paying for functionality they won’t use.

OUR TAKE

PaperVision Capture addresses many of the problems that companies face when trying to combine paper and electronic records into a coherent and reliable data flow. For paper documents, the program can take input from scanners (or other sources) and run the documents through a series of steps to get the data into the corporate database, an ECM system, or a range of line-of-business applications where it can be easily accessed and acted upon. And unlike traditional paper-centric capture products, this solution supports importing electronic files and forms, images, faxes, PDFs, email messages, and Microsoft Office files into its sphere, making it suitable for almost all documents in an organization’s workflow.

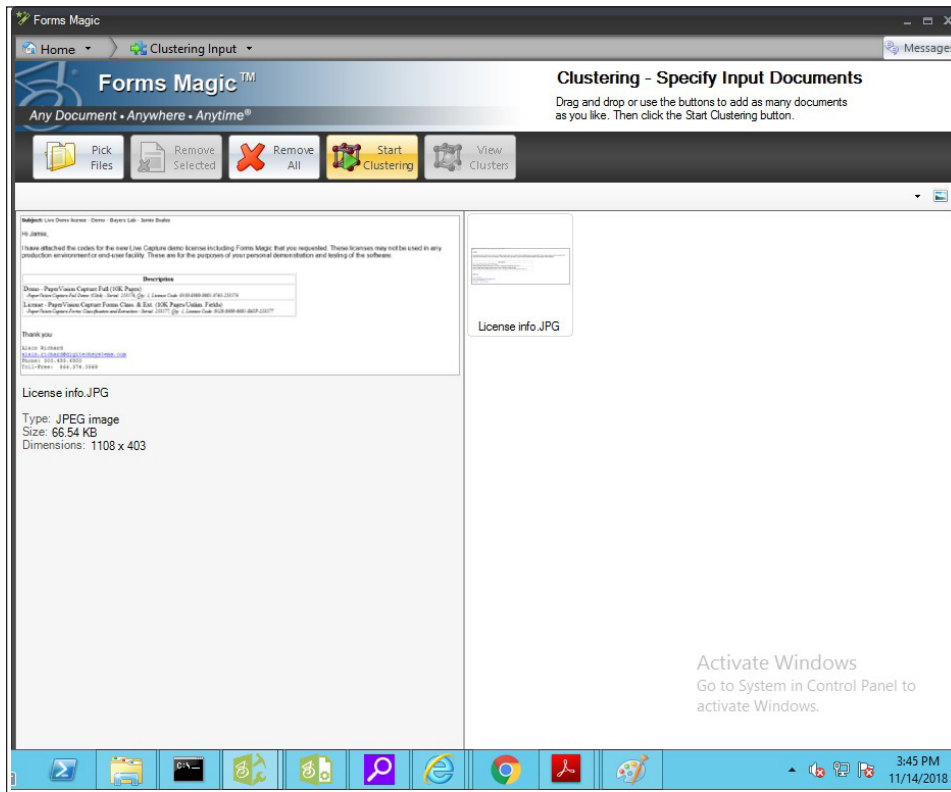
Naturally, PaperVision Capture delivers all of the features one would expect of an advanced capture/workflow solution. More notable, however, is the fact that Digitech Systems’ developers have been in the vanguard of bringing AI technology to bear on the challenges of document extraction and classification, and it comes to fruition in the optional Forms Magic module. Rather than relying solely on traditional optical character recognition (OCR), Forms Magic technology delivers the ability to “learn” the types of structured documents an organization receives and to intelligently group like documents together based on a range of parameters and commonalities, including the text itself, the position of the text on the page and more. The engine hones in on key points that distinguish one class of document from the next, so even if a crucial word like “Invoice” is missing or illegible to the OCR engine, the software is still able to discern what the document is and process it accordingly. It’s as close to the lofty ideal of robotic process automation (RPA) as we’ve seen in the document capture space.

Once the information is extracted, PaperVision Capture’s integration features allow it to automatically send critical data to other line-of-business applications. Also of note is the platform’s customizable nature, with optional Business Rules modules to suit particular business processes (such as Accounts Payable) or vertical industries (such as Healthcare). Moreover, the solution’s no-nonsense pricing structure makes PaperVision Capture ideal for schools, government agencies, and service bureaus tasked with processing large volumes of documents.

FEATURES & PRODUCTIVITY

PaperVision Capture lets scan operators take source documents in just about any format, extract the vital information, and make the data accessible to others in an organization. The solution excels at automating the steps that can be automated, while speeding the processing of information that requires operator attention. It allows secure integration of remote offices, and has sophisticated features that help level workloads for both employees and machines.

Naturally, the program’s features cover the full gamut of capture/indexing needs, including batch capture; zonal, barcode, and full-text indexing; and even optional handwriting recognition for capture/processing of forms data. The handy “Match and Merge” feature automatically populates index fields with data from existing databases or files. While the optional Accounts Payable (AP) Processing add-on allows users to match invoice information to existing purchase order information stored in an external Microsoft SQL or Access database. Document breaks can be inserted into a batch based on page count, barcodes, OCR (both Nuance and OpenText engines are supported), or blank pages. Moreover, batches can be grouped, split, and managed in real time to prioritize work and maximize speed.



PaperVision Forms Magic technology helps eliminate the sorting of structured documents by using OCR and artificial intelligence processing.

Of particular note is the optional PaperVision Forms Magic module, which employs AI techniques to sort documents and extract pertinent data to eliminate the labor usually associated with sorting and extraction. The technology does not rely on OCR alone to recognize documents and data. Instead, it utilizes Digitech Systems own patented machine learning algorithms to examine each document in seven different dimensions to ascertain what the document is, where the pertinent data resides, and how the document should be processed. PaperVision Capture also has robust and sophisticated workflow management capabilities. The source information can come directly from any scanner that supports either certified ISIS or TWAIN, or it can automatically import image files. Notably, the Allow Advanced PDF Import feature lets users import complex PDF files without having to change the configuration file directly.

To extend the program's functionality, the company offers a host of optional business rules that can customize the system to a particular organization's needs. For example, the General Business Rule verifies that certain detail fields have been populated or meet certain criteria, such as date range. The Capture Index Rule verifies healthcare claims against the National Provider Identifier database to verify that provider IDs are valid. Healthcare providers will also be interested in the HIPAA 837 Business Rule, which is used for the input of medical claim data by generating an approved HIPAA 837P EDI ANSI claim file for payment submission. For accounts payable needs, the AP Business Rule ensures invoice or statement line item totals are correct, and even verifies that detail line items within an invoice were calculated correctly.

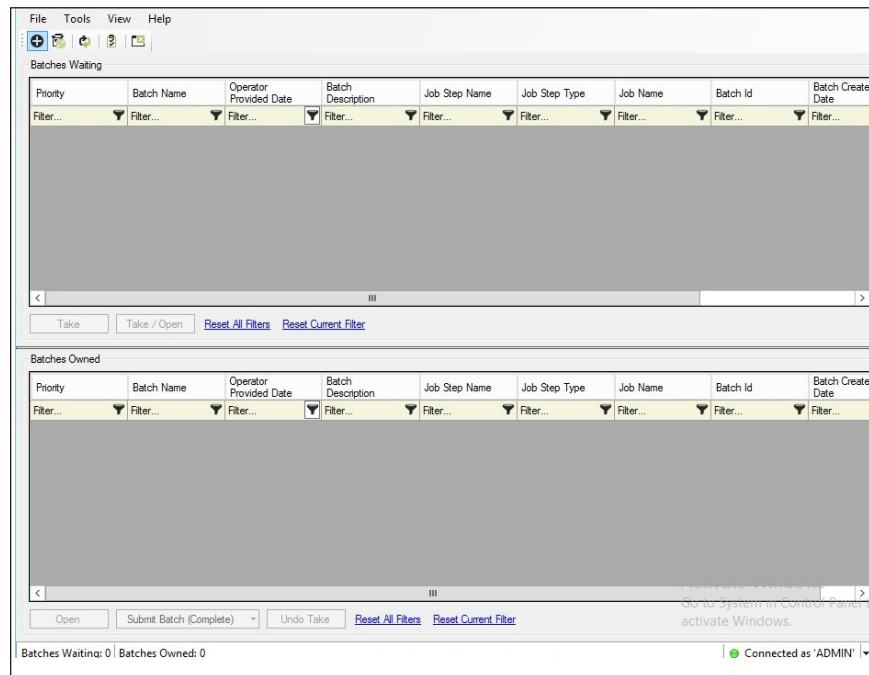
PaperVision Capture also offers extensive quality-control (QC) and statistics/analytics features to let managers track productivity and identify bottlenecks. On QC front, the optional PaperVision Capture QC module supports the tagging of batches, documents, pages or even individual index-field values for closer scrutiny; moreover, images and index values can be required to meet specified parameters. And an Auto Play feature "plays back" the captured image for a second look, even if the original document is no longer readily available. Buyers Lab analysts were particularly impressed with PaperVision Capture's Batch Priority feature. A priority value appears in the first column of the Operator Console for a user's jobs. The system calculates an awaiting job's priority based on values in four key metrics: job age (based on the number of minutes since the batch arrived), job step age (based on how long a job has been at a given step in the process), job step priority (certain steps, such as final QA check, can be given a higher priority value), and administrative priority (a value assigned that can impact the job's overall priority ranking; for example, jobs for a certain client or of a particular type can be assigned a value that will raise the batch's overall priority level). This automated priority system gives organizations very granular control over the order in which jobs are processed by operators, without requiring a manager to manually rank each one or tell an operator which batches are the higher-priority jobs.

After processing, captured data can be delivered to a Microsoft SQL Server database and/or exported to more than 30 different formats, including XML, Microsoft Word, and PDF files. Scripts are included for many common formats, but optional scripts and custom code make it possible to send output to any format desired. By default, PaperVision Capture provides an export for Microsoft SharePoint (both on-premises and SharePoint Online); a wide range of other third-party connectors are available to integrate the program's output with other software platforms.

USABILITY

Despite its power and flexibility, PaperVision Capture is easy to use for those familiar with a dedicated scan-capture program. Those new to capture products will need some degree of training, but the automated features built into the system help to minimize user intervention. The top menu line has a File command that lets an operator create a new batch or retransmit an existing batch without

duplicating data. Starting a new batch will present the operator with a choice of sources for the documents: either installed scanners or image file locations. After documents have been added to a batch, it can either be submitted as incomplete—waiting for additional documents to be added—or as complete and ready for processing. The top menu commands are also available as icons on a toolbar below the menu line.



PaperVision Capture’s UI shows batches waiting for attention in the top pane, and jobs “owned” by the user in the bottom pane..

Processing follows the steps as defined in the Job. This means that the data is sent for automated processing for those steps that are handled by a computer. If a step requires operator intervention, then it will appear on a list of available batches. Conveniently, an operator will only see those batches that are available for tasks that have been assigned to that operator (or that operator’s group). The operator can then take possession of the batch and work on it. This locks the batch until the operator submits it as complete or releases as incomplete or closes the batch and removes ownership

IT ADMIN & SECURITY

Configuration of the system and ongoing user and feature administration is handled in the separate PaperVision Capture Administration Console utility. The Administration Console has a hierarchical navigation pane on the left, with top-level entries for Global Administration, Entities, and any optional modules (such as Forms Magic) licensed within the system. The Global Administration section covers tasks such as system status, license management, maintenance, process lock monitoring, and system operations. The Entities section allows the administrator to define multiple separate units within the system. This is useful if an enterprise wants to keep jobs and data separate for different companies, divisions, or departments. Within each entity, the administrator can configure and monitor security settings, job definitions, and the status of batches. The right-hand pane of the utility displays data for that specific task. In the case of a report or log, for example, the administrator typically can just double-click on a data line to open a new window that will provide more detail or permit configuration

changes. And custom job workflows can be constructed via an intuitive drag-and-drop flowchart designer.

As for security, 256-bit AES encryption can be applied to images, index values and OCR data to prevent unauthorized access. Security settings allow users to be assigned to specific job steps or groups to ensure that access to documents is granted only users who need it, and only system administrators can alter security and job settings. In addition, the non-repudiation feature guards against any tampering with or modification of the source images, protecting the integrity of the original. Batch destruction policies can be set by the administrator to comply with government retention/privacy regulations.

SUPPORT & TRAINING

The reseller placing the system typically will have a support contract with its customers, though as long as the maintenance license is current, Digitech Systems will also provide customers with free telephone support. (Telephone support is available 9 a.m. to 7 p.m. Eastern time, Monday through Friday.) When Buyers Lab technicians placed anonymous calls (we did not reveal we were testing the product and its support) to the support line, we got through to a live technician promptly and received spot-on guidance. Digitech Systems also provides support through email and an online query form (although not yet live chat sessions), and the company maintains an online knowledgebase. Resellers also generally handle training (Digitech Systems provides training material). With their reseller's approval, customers can also arrange with Digitech Systems for custom on-site training for a fee. The company provides customers with a syllabus of topics and then builds a course to suit the individual customer's needs.

For self-help once a system is up and running, the documentation included with PaperVision Capture is thorough and extensive. The company provides a searchable, hyperlinked PDF Administration Guide—a whopping 740 pages—with a table of contents that is a well-organized outline of the entire product. In-program help is available at all times in the Administrator Console, and provides the same content as the PDF manual. For end users there's an equally thorough 113-page User Guide. Notably, no prior familiarity with programs of this kind is assumed: The guide clearly explains the terms used in PaperVision Capture (Batch, Detail Sets, Document, Index and so on) and then details each task an operator would need to perform, from batch creation and capture to indexing and quality control. Non-technical staff should be able to navigate most of the content without any trouble, and as with the Administration Console, in-program help is available at all times.

VALUE

Digitech Systems prices PaperVision Capture on a named- or concurrent-user license basis, and modules are offered à la carte. This allows an organization to custom-tailor a solution that fits its needs, without paying for functionality that will never be used. According to the company, a typical entry-level configuration is priced below \$4,000 and includes Capture and Index module licenses (which also deliver an extensive collection of scripts and filters) for two users and one scanning station for an unlimited number of scans. The license price includes a year of maintenance. After the first year, a maintenance and support agreement is priced on an annual subscription basis based on the modules deployed.

This straightforward pricing model stands in stark contrast to those of most other leading capture vendors, which price their systems on a scan-volume basis (either based on the nominal speed of the attached scanner, or on the actual number of pages scanned). Indeed, the pricing for PaperVision Capture does not penalize forward-looking customers that purchase a high-volume scanner in

anticipation of future growth, and it avoids unpredictable “peaks and valleys” in capture costs that can be difficult for an organization to budget for.

Notably, the Forms Magic module can help lower the cost of deployment compared to other capture platforms, since the AI technology can handle automatically what would typically require custom coding under a professional services engagement. And that’s not even addressing the harder-to-quantify cost savings in labor thanks to the automated sorting and data extraction. That said, it should be noted that there are other packages that take an “all-inclusive” approach to pricing (including the inclusion of dozens of homegrown custom integrations) that could offer a better value for installations that need to connect to multiple line-of-business applications.

STRENGTHS

- Complete selection of modules cover the full range of capture needs and let each organization tailor a solution to its unique requirements
- Available Forms Magic module uses AI to parse and process documents
- Available Business Rules simplify processing for specific tasks such as accounts payable or healthcare claims processing
- Wide range of optional connectors available for integration with SharePoint and other ECM platforms
- Custom workflows, batch-processing of similar jobs, and automatic batch splitting enhance productivity
- Unique batch-prioritization feature helps operators see and act on higher-priority jobs first
- Quality-control and index-verification features help ensure data accuracy
- Statistics/analytics features let managers track productivity and identify bottlenecks
- License-based pricing can be more affordable than competitors’ scanner-speed or scan-volume cost models

WEAKNESSES

- Limited native redaction function
- No control-panel integration with most leading MFPs and scanner brands
- Full functionality requires licensing of several modules

PRODUCT PROFILE

Versions:	PaperVision Capture is available in a single version with a range of integrated modules.
Pricing:	The solution is priced on a named- or concurrent-license basis. Optionally, users may choose from a variety of click-based licenses as well. The price for a typical deployment starts at less than \$4,000, which includes two named licenses with the Scan and Index modules on a single workstation for unlimited scan volumes. Optional modules are priced separately. Maintenance and support are included for the first year, and are priced on an annual subscription basis thereafter
Major Features:	Paper and electronic document capture; batch separation and processing; image cleanup; zonal and full-text OCR; manual and automatic metadata indexing; blind indexing and re-key verification to ensure data accuracy; quality-control and document-security features; capturing, indexing and processing functions can be distributed across multiple systems and geographic locations or run on a single workstation
Server:	8GB RAM; Microsoft Windows Server 2008, 2008 R2, 2012, 2012 R2, or 2016; Microsoft .NET Framework version 4.7 or higher; Microsoft® SQL Server® 2008 or later
Client:	Micosoft Windows 7 and later; Windows Server 2008 and later
Compatible Hardware:	4GB RAM, Microsoft Windows® 7, 8, 8.1, or 10
Availability:	PaperVision Capture is available worldwide from a network of resellers.
Languages:	English

KEYPOINT INTELLIGENCE - BUYERS LAB • North America • Europe • Asia

Gerry Stoia, CEO

Deanna Flanick, CRO

Patrick Albus, CFO

Randy Dazo, Group Director,
Office Technology & Services
Randy.Dazo@keypointintelligence.com

Jamie Bsales, Director,
Solutions Analysis
Jamie.Bsales@keypointintelligence.com

George Mikolay, Associate Director,
Copiers/Production
George.Mikolay@keypointintelligence.com

Marlene Orr, Director,
Printer & MFP Analysis
Marlene.Orr@keypointintelligence.com

Carl Schell, Managing Editor
Carl.Schell@keypointintelligence.com

U.S. ANALYSTS

Kris Alvarez, Editor
Kris.Alvarez@keypointintelligence.com

Lee Davis, Editor,
Scanner/Software Evaluation
Lee.Davis@keypointintelligence.com

Kaitlin Shaw, Editor,
Printer & MFP Evaluation
Kaitlin.Shaw@keypointintelligence.com

EUROPEAN ANALYSTS

Priya Gohil, Senior Editor
Priya.Gohil@keypointintelligence.com

Samantha Phillips, Editor
Samantha.Phillips@keypointintelligence.com

Simon Plumtree, Senior Editor
Simon.Plumtree@keypointintelligence.com

Andrew Unsworth, Editor,
Software Evaluation
Andrew.Unsworth@keypointintelligence.com

LABORATORY

Pete Emory, Director, U.S./Asia
Research & Lab Services

David Sweetnam, Director, EMEA/
Asia Research & Lab Services

COMMERCIAL

Mike Fergus
Vice President of Marketing &
Product Development

Gerry O'Rourke
International Commercial Director