



Scanshare

Document Workflows

Example document workflows for Scanshare



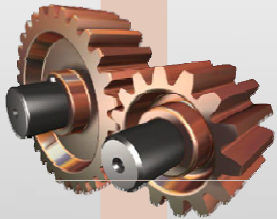
What is Scanshare?



The document – business critical data, currently locked in paper form



The MFD – the *on ramp* to an organisation's digital information workflow



Scanshare – the middleware/bridge from paper form to digital environment



The Backend – an existing fileserver, or CMS/ERP/DMS, or digital archive

What is Scanshare?



- **It's document capture *middleware***
 - **The bridge between paper and electronic document flows**
 - **It doesn't lock you in to a specific document system now, or in the future**
 - Integrate Scanshare into your existing document system, business application or network file server
 - **Its job is to scan data, attach metadata, perform transformations and deliver to a document system or defined file storage**
 - **It converts files to a searchable format and can extract data from areas (or zones) to automatically drive business processes and workflows**

Scanshare Version Overview



■ Scanshare Essentials

- Simple to set up, low cost
- Limited systems connectors/integration



■ Scanshare Enterprise

- More complex to configure, slightly higher cost
- Huge array of customisation, recognition, integration and connection possibilities

* The Scanshare multifunctional client is identical between versions; operators will not know which version they are using

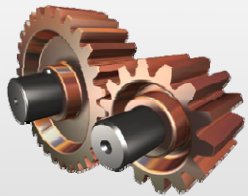
How it works - overview



[Propeller heads click here](#)



Capture – scan document with MFD client or via watch folder, email, FTP and Desktop Client



Process – image enhancement, convert to desired format, extract data from the document (text, barcodes, marks etc.)



Store – connect to document system or fileserver, rename file and place in location

Scanshare Example 1 – dynamic choice

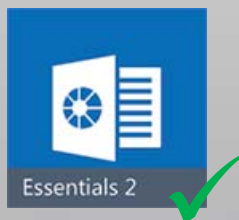
Requirement – integrate MFD and scan solution with existing folder structure on fileserver; if the folder structure changes automatically update the MFD display; reference number should look up a table on the corporate Microsoft SQL database

Folder *	Customers
SubFolder 1 *	Acme Limited
SubFolder 2 *	Invoices
New Folder *	May 2013
Reference Number *	564987

Home Settings Scan

Metadata selection

Questions on MFD point to live directory structure and reflect any changes automatically; the user can enter the name of a new directory to be created if required; the SQL lookup function returns a list of reference numbers from the company database for selection; the document is automatically filed and requires no further user intervention



Scanshare Example 2 - automation

Requirement – process documents of a specific type automatically, using information in the document to route, distribute and file the document correctly

DELIVERY DOCKET

DELIVER TO:
Customer: MR JOE SMITH LAWYERS
Address: SUITE 10, LEVEL 2
5 BOBBY DRIVE
Suburb: SYDNEY State: NSW
Email: Administrator@dsf.com

EID NO 125566
Customer No: Y11001
Customer P.O. 100416

Part No	Description	Qty	Serial Number
ES2650C	eStudio2050C Digital Colour MFP	1	SC71225007
MR3024	RADF for ES2050C2051/2550C/2551C	1	SMJL226834
GD1320	Fax board for ES2050C2051/2550C/2551C	1	

Barcode detection

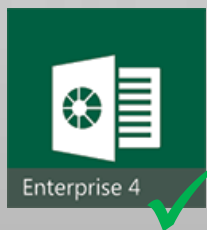
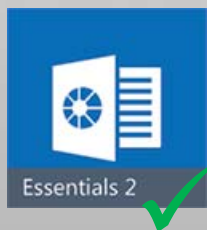
Read barcode value and use it to rename the document and select correct directory on server

Zone OCR

Extract email address to send copy of document

Delivery and Storage

Utilise the Zone OCR metadata in the address field for the email connector and utilise the barcode value in the email subject. The barcode metadata value is used to select the correct document type folder on the fileserver.



Scanshare Example 3 – convert archive

Requirement – back-file conversion of paper archives into PDF/A format for long-term storage and retrieval; scan in batches but require each document filed separately in the archive; take a copy of the metadata and store in the CMS

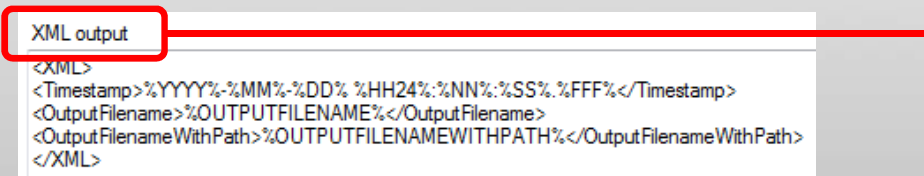


Barcode separation

Scan the documents in batches to speed up processing, using a barcode separation page to split the individual documents automatically

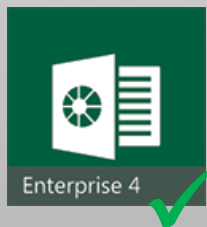
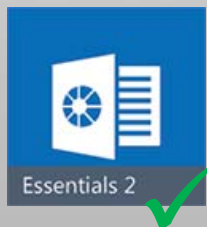
File Format

Select PDF/A for ISO-approved, long-term archival of documents and records



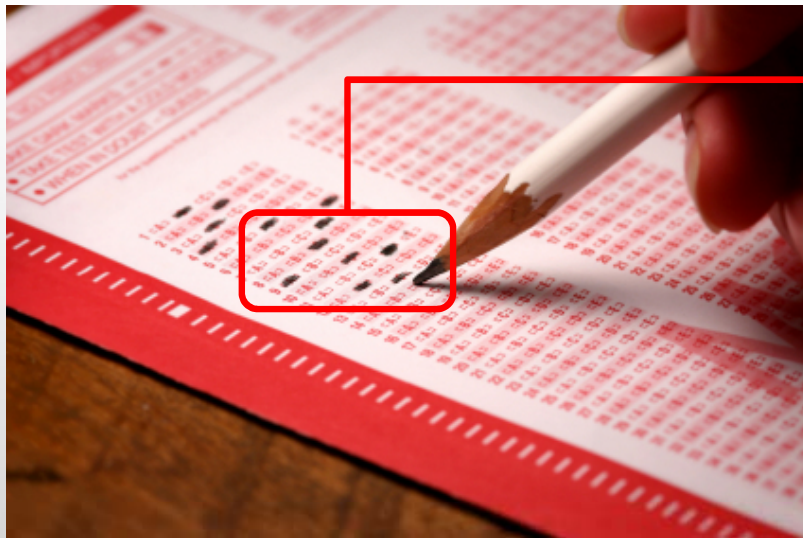
Metadata Export

Export document metadata in XML format so that external document systems can import the document and file with the context



Scanshare Example 4 - logic

Requirement – scan a form and read the specific areas for marks; redact the personal details; based on the selections made on the form move the document to the appropriate directory and notify the user that it requires further processing



OMR Processing

Create document zones for the OMR module to interrogate; use the Script connector to create a custom VBScript to read the contents of the document zones and build an output path

Redaction

Use the annotation module to redact the name and address areas of the form

Notification and Storage

The notification module can alert a user to a new document (without including it as an attachment); the file store module takes the path built with the VBScript, using the form data



Scanshare Example 5 - integration

Requirement – scan a standard invoice and use the data on the form to update the internal records; convert the scan to a Excel file and deliver to a **SharePoint** server

Bestnr:

Ordrenr...: **33147/00** —

Side: 0001

Rekvisisjon: svein'	Selger: KJETIL BJØRNØY
Betalings bet.: NETTO PR. 30 DAGER	Dato: 28.01.10
Leverings måte:	Kl.: 12:12:46
	Lev. dato:

Zone OCR Processing

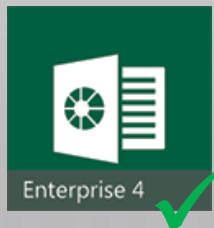
Read the contents of this zone which is the same on each document; use this value to update the corporate database and name the file

SQL Connector

Update the corporate database with the value from the Zone OCR

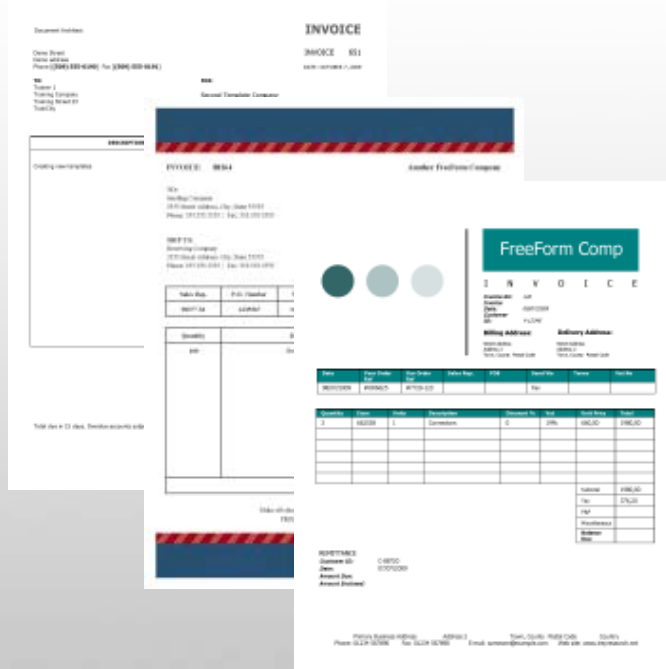
Conversion and Connection

Select the Microsoft Excel (XLSX) format as standard output; upload the document to the corporate **SharePoint** server in the desired file library with the correct naming convention



Scanshare Example 6 – recognition

Requirement – scan multiple invoices from different suppliers; automatically detect which invoice is from which supplier and extra information from the document to ensure it's filed in the correct directory on the server, and notify the user



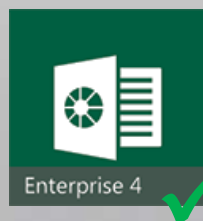
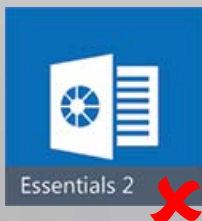
FreeForm Recognition

Train the FreeForm module to recognise every incoming invoice. Once identified the FreeForm module will select the appropriate sub workflow for the specific invoice type.

Each sub workflow has OCR zones defined to select the correct directory on the corporate file server to store the document.

Notification Module

Once successfully processed the user is informed that the document has been delivered to the specified directory, so it can be further actioned.





Scanshare

Feature Highlights

Scanshare Essentials vs. Enterprise

Major Functions and Features

■ File format highlights*

- Searchable PDF, PDF/A
- Encrypted PDF
- TIFF
- JPG
- Word (DOC, DOCX, RTF)
- Excel (XLSX)
- Advanced Bi-tonal Compression
- XML Metadata
- Raw Backup



* (Scanshare can utilise around 20 different output file formats)

○ Option available at extra cost

Major Functions and Features

■ Processing Options

- Automatic deskew
- Blank page removal
- Advanced image enhancement
- Full page OCR
- Zone OCR
- OMR
- ICR
- Barcode recognition
- Advanced Barcode recognition
- FreeForm recognition



Major Functions and Features

■ MFD Client Integration

- Typed
- Selected: Static
- Selected: SQL
- Selected: Connector
- Selected: Script
- Selected: XML
- Folder Browse
- Search While Typing
- Regular Expressions

