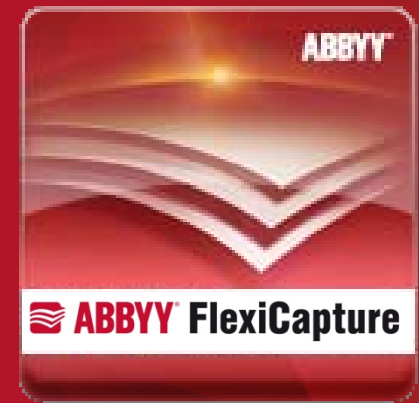# Scenario:
Digital Mailroom

Scenario: Insurance Industry

- 16.000 insurance claims, application documents etc. enter an insurance company in the customer service per day

- Work is initiated by distributing those incoming documents to different:
  - Departments
  - Groups of workers
  - Individual employees
  - Directly into Business Processes

- Manual distribution of documents from customers requires:
  - Document analysis and separation
  - Knowledge of organizational structure
  - Physical movement of paper
  - Manual data extraction

Automatic Document Classification

- Automatic classification removes document analysis and manual sorting of incoming documents, which enter an organisation daily:

  - Scan documents in unsorted batches

  - Automatic classification of documents based on layout, structure and content

  - Routing of documents to clerks or business operations for further processing

Insurance claims → Department A · · ·

Customer complaints → Department B · · ·

Insurance applcations → Department C · · ·

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Scenario: Content Classification

- **Scenario:** Customer communication requires to access, extract and interpret the content of a document or letter for backend processing

- Interpreted content initiates a transaction in a backend application or a routing to the recipient

Max Mustermann
Mustergasse 12
81243 Musterstadt

20.12.2010

Dear madams and sirs,

I wanted to inform you that I am going to move from Munich to Stuttgart and I will be only available per post at this new address after 24.12.2010. Please use this address for all communication issues in the future.

Additionally, I wanted to ask you if you could interrupt payments of my insurance fees from December 2010 to March 2011, because I am going to change jobs and not being available fulfill payments.
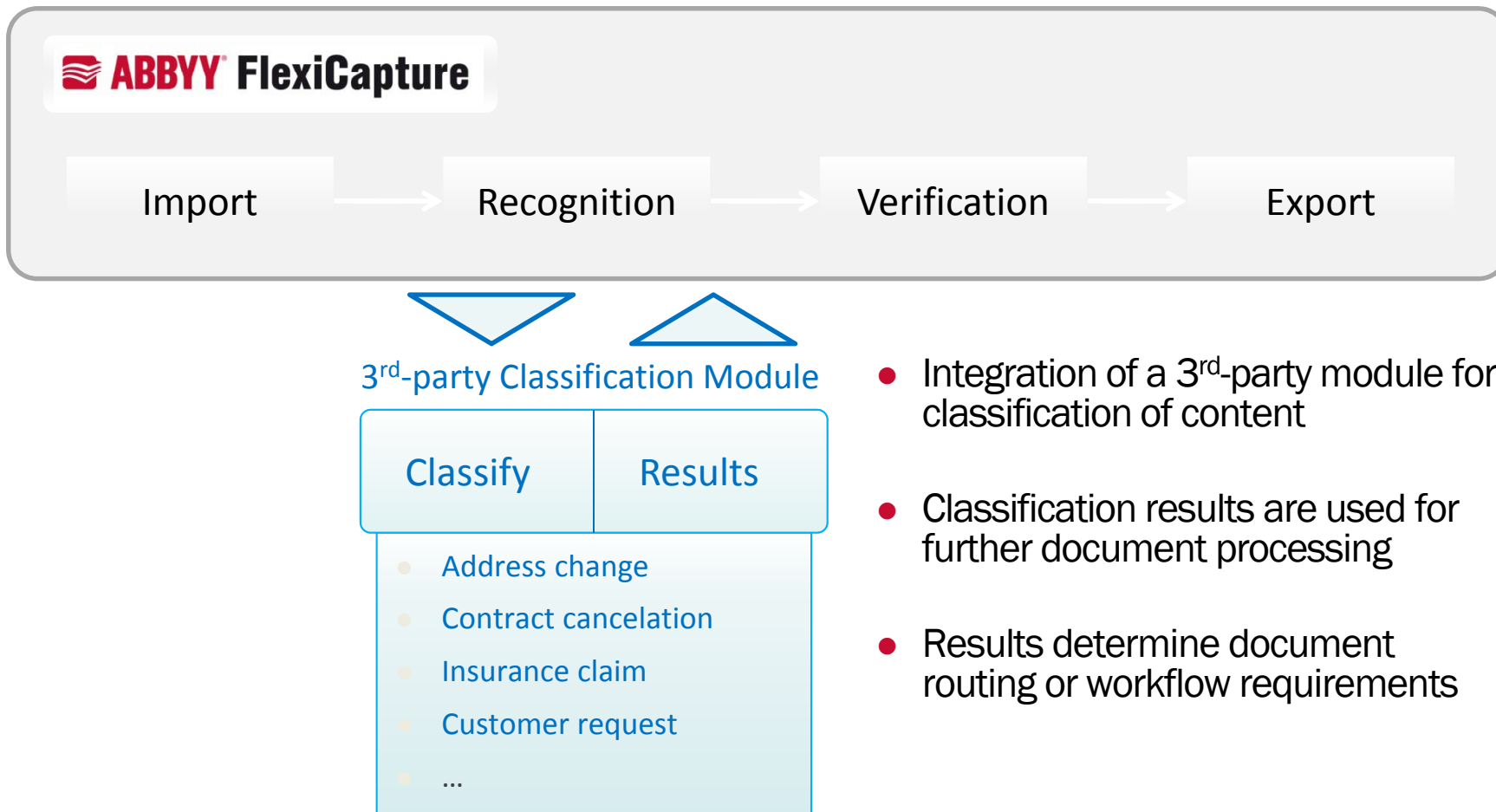
Finally, I wanted to inform you about my new born daughter, where I would need to get an official offer for a life insurance for her. Please contact me via email.

What FlexiCapture can do:

- Built-in FlexiCapture classification technology analyses layout information and structure only

- FlexiCapture can do document classification into separate document types and route them to the clerk for backend processing

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Integration of a 3rd-Party Classification

ABBYY FlexiCapture

Import → Recognition → Verification → Export

3rd-party Classification Module

Classify	Results

- Address change
- Contract cancelation
- Insurance claim
- Customer request
- ...

- Integration of a 3rd-party module for classification of content

- Classification results are used for further document processing

- Results determine document routing or workflow requirements
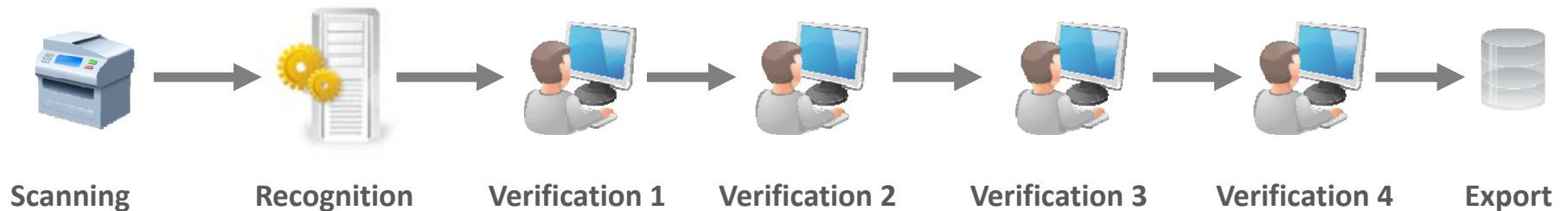
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Custom Module Integration and Workflows

- Document input in customer service may require further **enhancement** of the insurance companies' **standard capture application** and workflow by integrating:

    - 3rd-party image enhancement : image pre-processing or conversion of documents to PDF before import

    - 3rd-party ICR: routing of hand printed insurance application forms to third-party ICR module for recognition

    - 3rd-party Verification modules: integration of an external service provider using their own custom built verification client for validating insurance documents

- **Compliancy requirements** may require individual workflows, to allow:

    - Document routing to special operators or departments

    - Usage of different verification operators verifying specific data on specific stations
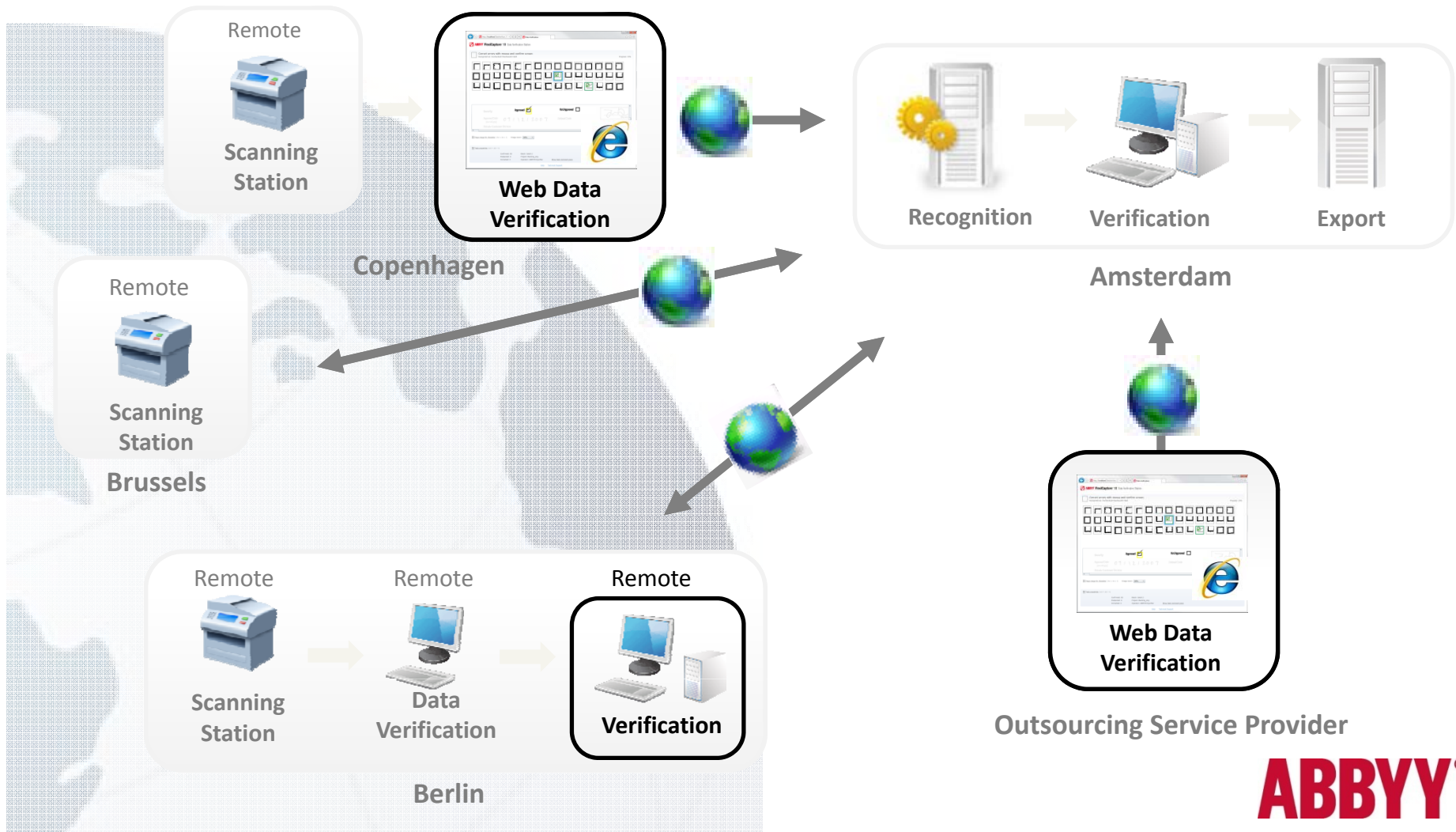
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Scenario: Multiple Verification Steps

- **Use case:** verification of different data (subset of data) on each of the verification steps, so that each operator verifies only a subset of data

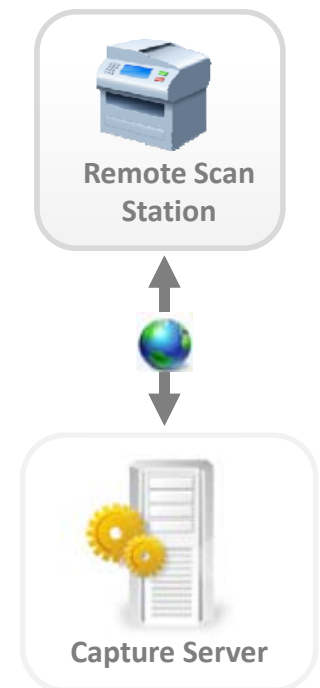| Scanning | Recognition | Verification 1 | Verification 2 | Verification 3 | Verification 4 | Export |

- Insert custom processing stages for verification

- Provide different layout of the Verification Station on each of the steps

- Increase data security through different operators verifying the complete document

- Possibility to use external service providers for verifying non-sensitive data

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Remote Capture with Web-based Stations

Remote
Scanning Station

Web Data Verification

Copenhagen

Remote
Scanning Station

Brussels

Remote
Scanning Station

Remote
Data Verification

Remote
Verification

Berlin

Recognition

Verification

Export

Amsterdam

Web Data Verification

Outsourcing Service Provider
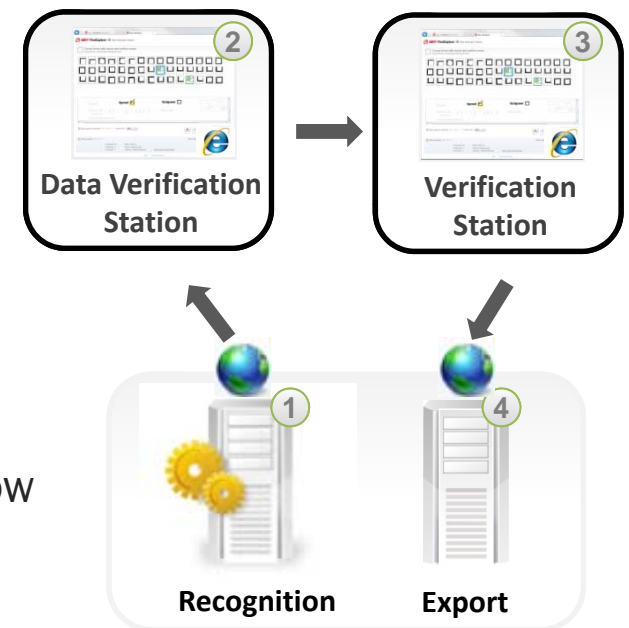
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Easy Deployment of the Scanning Station

- **Easy distribution and setup** of the Scanning Station*) in and outside the company network via Click Once installation

- **Enhanced scripting** for customisation of the Scanning station

- **Re-scan queue** for problematic document scans to be resent to scanning

- **Benefits:**

  - Scanning at the insurance agency based on scanning profiles ensures the consistent quality across all decentralised offices

  - Reduces operating and deployment costs

  - Consistent delivery of business documents from remote agents

Remote Scan Station

Capture Server

*) Web-based Scanning Station planned for a future Maintenance Release

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Web and Remote Verification Stations

- **Web stations for Verification**[*] for distributing task between local and decentralised workforces

- Verification tasks can be completed **remotely**

- Web-User interface based on Microsoft Silverlight (available for IE, Firefox, and Chrome)

- Benefits:

  - Allows distributed workforces to be leveraged at low costs and helps to integrate decentralised offices

  - Easy integration of outsourcing service providers for low-level verification tasks

  - Easy support from the head office

[*) Web-based Data Verification Station available in Release 1, web-based Verification Station planned for a future Maintenance Release

Data Verification Station → **Verification Station**

Recognition **Export**

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Double Verification

	Step 1	Step 2	Step 3	Step 4

Step 1

Step 2

Data Verification Operator 1

Data Verification Operator 2

Step 3

Data Verification Operator 1, 2, 3

Step 4

SSN

12345678

City of birth

Manchester

1. Setup of fields for double verification

2. Two DV operators verify the fields independently

3. Third DV operator gets value mismatch and verifies

4. Verified data is exported

Quality Assurance and Compliance

- Ensure greater accuracy with **double keying** of critical fields and be compliant with security requirements through **distributed verification**

  - **Double Verification** allows enterprises to independently verify key fields by two verification operators

  - **Distributed Verification**[*] to fulfill security requirements on fields

  - **Web Service API** for 3rd-party Verification modules

  - **Customise the look-and-feel** of the ABBYY Verification Station

- Benefits:

  - Quality assurance on critical data fields, which need special attention

  - Process documents with confidential information in the same capture workflow

  - Leverage on existing verification routines

*) Distributed Verification planned for a future Maintenance Release

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Advanced Reports and Statistics

- **Pre-defined standard reports** and **custom reports** allow better compliancy with companies' reporting requirements

  - **Include Custom Reports** based on Crystal Reports Editor for statistics generation

  - **New Standard Reports** available

  - Import users from **Active Directory**

- **Benefits:**

  - Compliancy with internal reporting requirements

  - Especially large capture installations can be easily setup with transferring users from internal user management

  - Enhanced reporting helps with being compliant with auditing requirements

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