everteam

everteam.capture

Production Catalog

Legends

Key	Definition	
ET	Everteam	
EG	EVER GROUP	
ECM	Enterprise Content Management	
	Information	
	Note	
	Warning	
	Critical Information	
	Action	

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1. Product Catalog

1.1. everteam.capture

1.1.1. What is everteam.capture?

Everteam.capture is an advanced, robust solution for capturing large volumes of content, from multiple sources. Designed to deliver immediate results and ROI, it can feed content into any system, through its standard based XML export utility.

Everteam.capture covers the entire document capture cycle from batch preparation to scanning, indexing and quality control phases. Some of the key benefits provided by everteam.capture are:

- Shorten the implementation time of content ingestion phase.
- Increase productivity, reduce overheads towards a paperless office.
- Get immediate value and return on investment within a year.
- Reduce costs related to managing and storing paper documents.
- Enhance employee productivity by monitoring throughput and efficiency.

1.1.2. Business Model

Capture

- Scanning
- Batch Indexing
- First Quality Control

Process

- Barcode Classification
- Process Identification
- Form Indexing
- Character and barcode recognition
- Lists and controls
- Image enhancement
- Attribute correction
- Approval /rejection management

Deliver

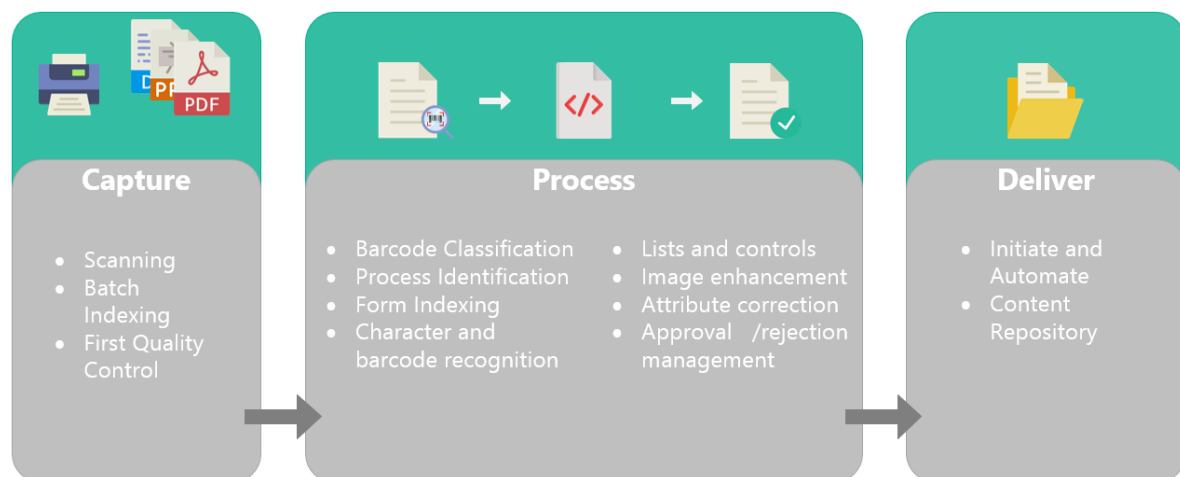- Initiate and Automate
- Content Repository

Figure 1: Business Model

Based on an extended experience in on-site implementation of many capture and content management solutions, Everteam developed a 4-phase methodology to handle the backlog scanning process and optimize productivity in a scanning workshop environment.

Everteam.capture naturally integrates this methodology based on specialized user-friendly interfaces and a security context reflecting the different roles coming into play in the process

The 4 phases of the business model are:

- Preparation.
- Capture.
- Processing.
- Delivery.

The resources required to handle the process are:

- Office operators.
- Scanning operators.
- Indexer operators.
- Quality controllers.
- Team leaders to monitor the backlog scanning and indexing operations.

1.1.2.1. Preparation

Preparation is probably the most important phase in a High-Volume Scanning (backlog) life cycle. It will define the conditions for the success or failure of the scanning operation. It is essential to achieve the scanning operation within timeframe and budget

It highly affects the following phases of the life-cycle:

- Capture: provides a uniform batch set.
- Processing: provides simple pre-indexing sheets.

The preparation is divided into 4 steps:

- The Physical preparation, this first step is important to:
  - Set the project timeframe and boundaries.
  - Analyze all existing backlog documents and their types, and plan for the scanning process.
  - Understand how and where the documents are currently stored and organized.
  - Define and install the required hardware and system infrastructure required for the scanning operation.
  - Define and install the required hardware and system infrastructure required for storage spaces.
  - Define how to restore and reorganize scanned documents.
  - Constitute the scanning batches and separators.

- The Logical preparation, this second step is important to:
    - Define the attributes of each category of documents.
    - Specify the conservation and purge rules.
    - Specify the conversion procedures.
    - Specify the extraction and standardization procedures.
    - Implement the underlying database structure.
    - Implement the underlying distributed or centralized storage spaces.
    - Implement and schedule the storage, purge and conversion procedures.
- The System customization, this third step is important to:
    - Define the various forms and separators required for the basic scanning process.
    - Define the various forms required for a rescan operation following a scan failure.
    - Specify the reject management procedure and forms.
    - Specify the quality control procedure and forms.
    - Specify the pre-indexing procedure and forms.
    - Customize the scanning application to adapt it to the above.
- The Resources preparation; This fourth step is important to:
    - Assess the technical, managerial and organizational capabilities of the required personnel.
    - Define the training curriculums.
    - Define the teams work shifts.
    - Constitute the scanning team.
    - Train the scanning team.
    - Perform a proof of concept for a duration defined by the project scope.

1.1.2.2. Capture

The capture process is a straight forward operation. Batches are prepared for scan operators. Separators are inserted in order to separate different categories in the same batch. Separators are usually white pages with a bar code indicating the code or name of the following category in the batch. Batches might contain pages in more than one format. In this case, an efficient document feeder is required.

Scan operator connects to the system using a user name and a password. The scan application is started.

The scan operators, after logging in to the application by using the scanning credentials, insert the batch in the ADF, after checking that all pages of the batch are physically separated by skimming through the pages.

- Batch indexes, defined during the requirements study and analysis phase, are entered on the Capture application.
- Batch indexes are used to index many documents in one time.
- It is a good practice to enter the number of pages per batch and perform parity checks.

- It is a good practice to assign a meaningful identification number to a batch so documents belonging to a batch are identified and deleted whenever a rescan is needed.

The batch is then scanned.

In case of paper jam, the whole batch can be rescanned using the same batch number. A sophisticated scan application may allow a rescan of the remaining lot only. At the end of the scan, the scan application compares the number of scanned pages to the number entered at the beginning of the operation.

The operator(s) performs a quality control based on a sampling approach:

- A faulty scanned page can be rescanned separately by providing the batch number and the page order in the batch:
    o The order of the page in the batch is provided by the scan application
    o In this case, the scan application deletes the existing page and replaces it by the newly scanned one
    - Quality controllers may have the right to "enhance" a scanned image:
    o The scan application usually provides tools to do so
    - Quality controllers may decide to ask the scan operator to rescan the whole batch:
    o In this case, the scan operator replaces the batch in the ADF, enters the batch number and activates the scanning
    o The scan application deletes the old batch and inserts the new one

If quality test is passed, the physical batch is stored and the scan operation is committed. If not, batch is re-scanned "in replacement" of first scan using the batch number or name.

When the batch is committed, all pages of the batch are now ready for processing. Processing usually consists in pre-indexing the pages of the documents for further description.
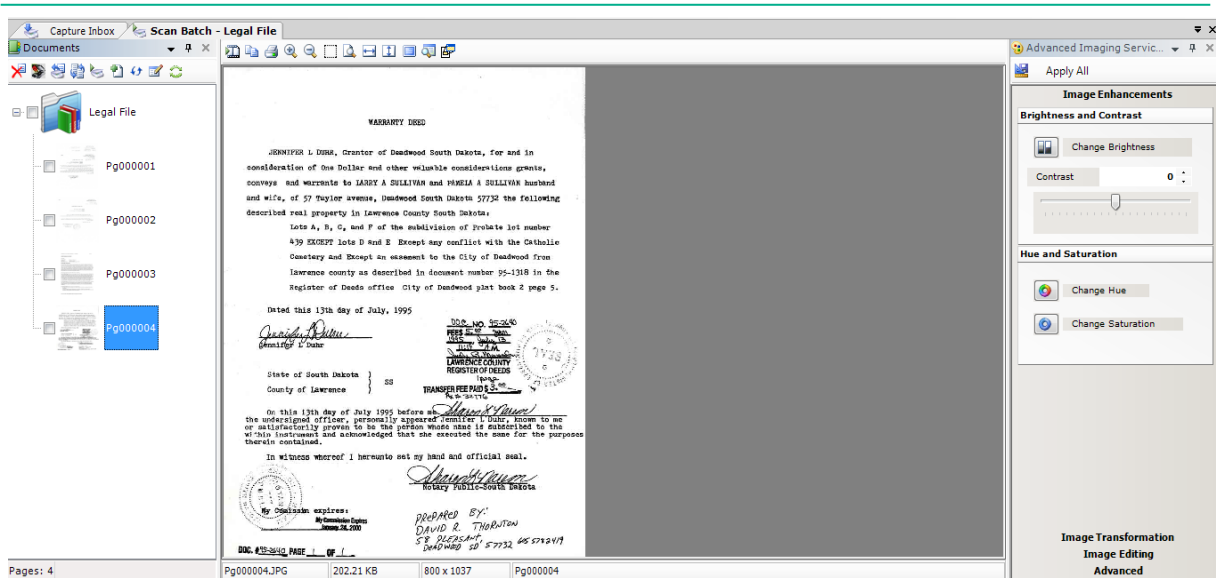
Figure 2: Batch Capture

1.1.2.3. Processing

The indexing form may vary based on the category of the page to index, as identified and designed during the preparation phase.

The user, through the imaging tools available can perform some actions like rotation, zoom... to view / manage the image, but usually cannot perform enhancements on the image.

The user locates the values to enter on the image or uses list of values for data entry. The image is pre-indexed. When the user commits the work, a new image (next in the batch) replaces the current one. At the end of the batch (or at any time depending on the scanning application), the user can display all images of the batch in thumbnail format and select the image to index.

Similarly, all the documents should be indexed.

Once all of the above is done based on the types of documents, batches are then sent to the quality controller, who will then log in using Quality Control credentials on the scanning application to check the images scanned, the indexes entered and all other action performed. Once checked the batch is ready for publishing.
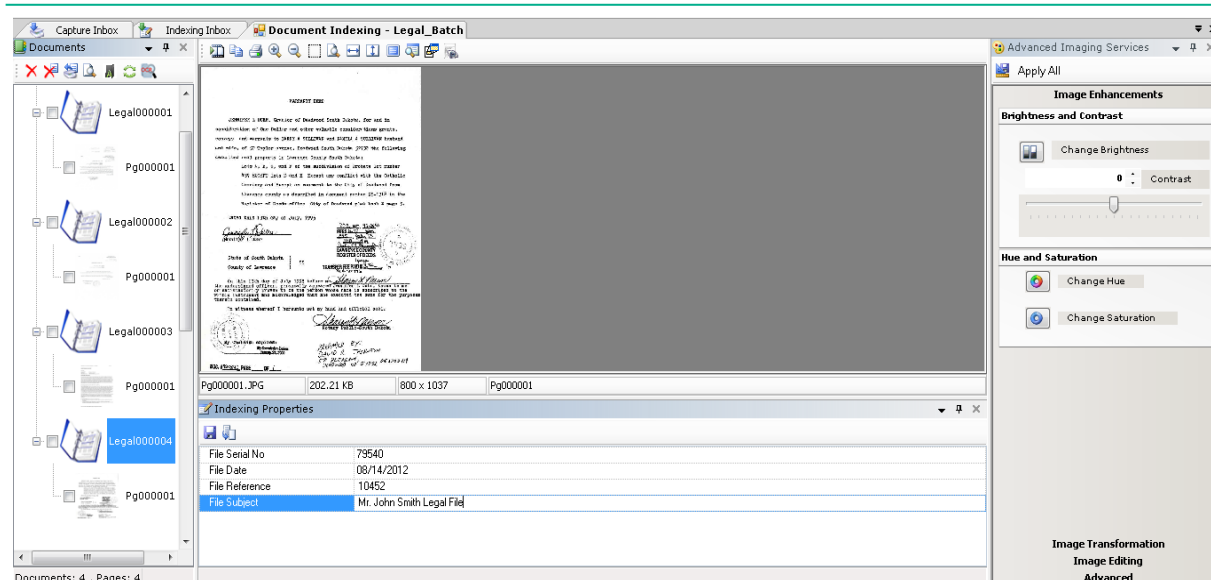
Figure 3: Batch Processing

1.1.2.4. Delivery

The delivery phase is the phase when the documents files and the schema (XML document) that contains the indexes of the scanned documents and describes the document Batch are generated.

At this stage, the following points should be clearly defined:

- The publishing location: Hard-drive, network, SAN…
- What is the Document Management application to which we should migrate the published documents?
- The attributes mapping between fields in the everteam.capture published batch and the fields of the DMS (or other) application

Everteam.capture provides out-of-the-box 2 publishing map definitions:

- Publish: The system connects to a pre-defined site/library/content type and provides the possibility to map between Capture indexes and the selected document type indexes
- Publish to Database: The system connects to a pre-defined everteam solutions application database and provides the possibility to map between Capture indexes and the selected object indexes.

1.1.3. Application Architecture

1.1.3.1. Topology

Since it's a client-server application, no specific topology is recommended for the installation of everteam.capture beside the set of installation Pre-requisites.

However, a scanning location (Workshop) can have the below typical topology on the hardware and networking level that would help determine the instances of everteam.capture needed and the performance required from both the network and the database server
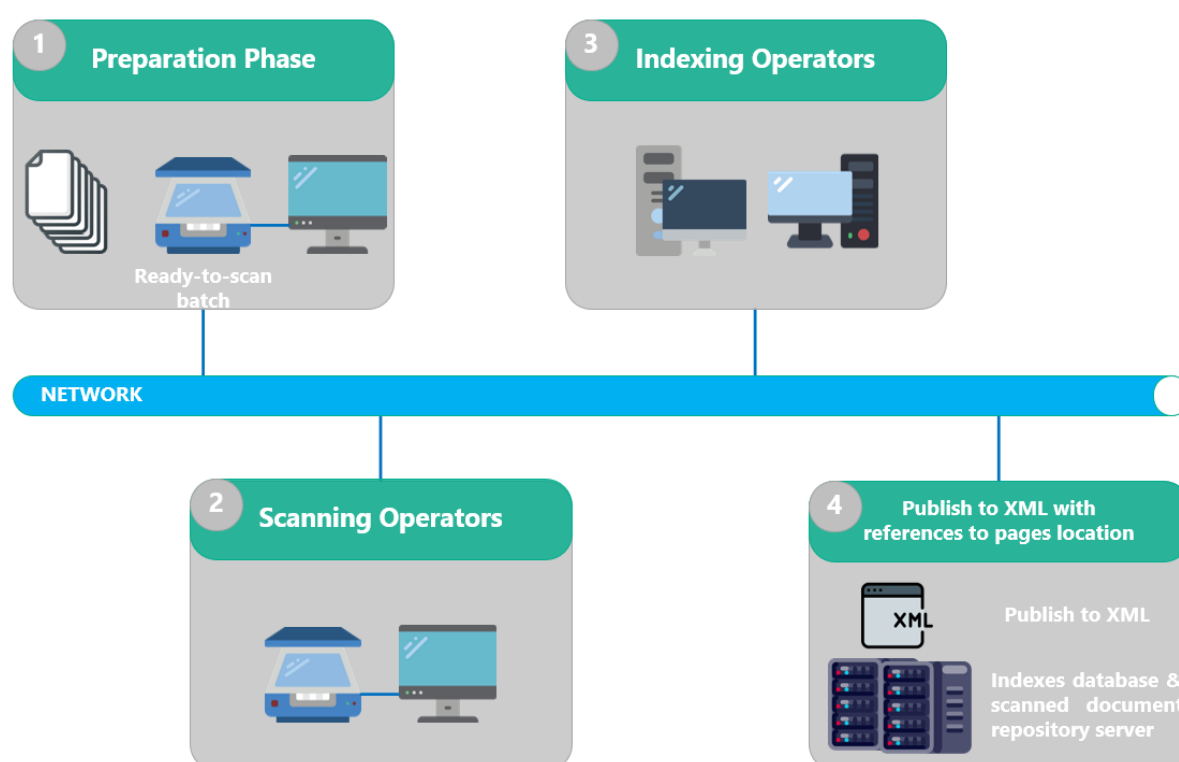

Figure 4: everteam.capture Topology

The client operators must have an installed everteam.capture application each connected to the centralized database instance and sharing the same documents repository.

1.1.4. Application Features

Everteam.capture provides many powerful features throughout the different stages of the cycle:

1.1.4.1. Capture Features

Multiple scanning interfaces support

Everteam.capture supports the two main industry standard interfaces:

- TWAIN
- ISIS

Allowing it to be compatible with any type of scanners installed locally or on the network

Electronic documents integration

Everteam.capture allows the insertion of electronic images into the scanned batch or at a later stage into the document pages

This feature allows seamless on-the-fly corrections on the batch without the need to rescan a whole package

Scan modes predefined configurations

In order to allow a standardized scanning operation and to control the scan output quality, everteam.capture allows administrators to set many scanning configurations controlling the following options:

- Resolution.
- Output format.
- Interface.
- Image mode.

Image enhancements advanced options

Everteam.capture integrates an advanced viewer allowing users to enhance the scanned pages quality and make the necessary corrections if needed. The viewer functionalities cover:

- Image brightness.
- Image hue.
- Image saturation.
- Image cropping.
- Image Inverting.
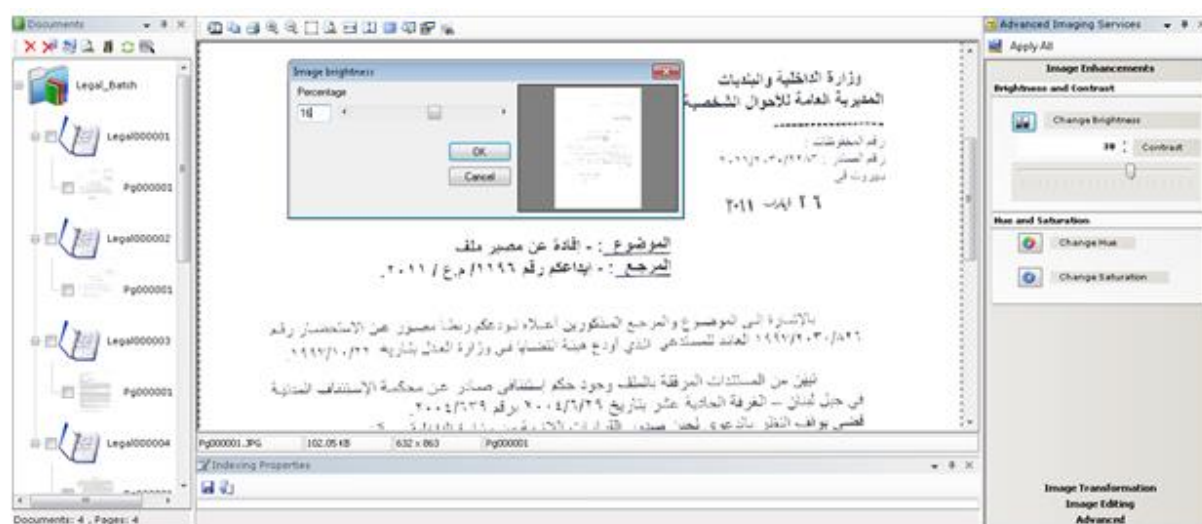- Rotate image.
- Zoom in/out.
- Print image.

1.1.4.1. Capture Features

Figure 5: everteam.capture Advanced Viewer

Batch common features

- Delete page.
- Switch pages position.
- Network scanning.
- Rescan page.
- Rename page.

1.1.4.2. Indexing Features

OCR / ICR support

Everteam.capture supports content capture in English, French, Arabic and many other languages making it the solution of choice regarding multilingual content extraction and storage.

Barcode recognition support

Everteam.capture implements all the international barcode standard recognition engines allowing it to cover any type of barcode on a page.

Barcode recognition is mainly used for:

- Indexing purposes
- Documents separation purposes

Batch separation options

Everteam.capture implements 3 options to automate the segregation of a batch into documents:

- **By barcode:** A barcode page is inserted at the start of each document, the system will automatically recognize the barcode and separate on that level
- **By page count:** For documents with a fixed number of pages, the system can be configured to separate by the documents page number; When the separation operation is launched, the system will make a count of pages and separate according to the given number
- **By form recognition:** This advanced feature allows the definition of a specific first page document template and when automating the batch segregation, the OCR engine will recognize and compare with the pre-defined template and do the separation accordingly

1.1.4.3. A Dynamic Forms Generator

The main objective of this feature is to address the need of documents indexing: Different types of documents have different attributes and a global solution should be able to address this aspect in a generic and intuitive manner.

Everteam.capture offers the possibility to define a template which is a set of attributes and for each attribute (Content field) a set of properties:

- Field name
- Control type: Text Box, combo, calendar...
- Data type: Numeric, text, date
- Mandatory (Y/N)
- Enabled (Y/N)

This template will later be linked to a batch thus allowing for its documents to be indexed in the same standard manner.

Additionally, we can link LOVs in the template to external data objects making this tool an extensible and scalable feature in regards to the indexing operation

1.1.4.4. Zone OCR Templates

Another interesting feature used to facilitate the users indexing job is the predefined zone OCR template applied on the documents batch.

This feature allows the definition of regions on a given document type template (It is always the first page of a document) and linking those regions to the attributes pre-defined in the previous section.

In this way, once the indexing operation is launched, these attributes will be automatically filled with the data retrieved from the specific region simplifying the indexers task and reducing the indexing time significantly.
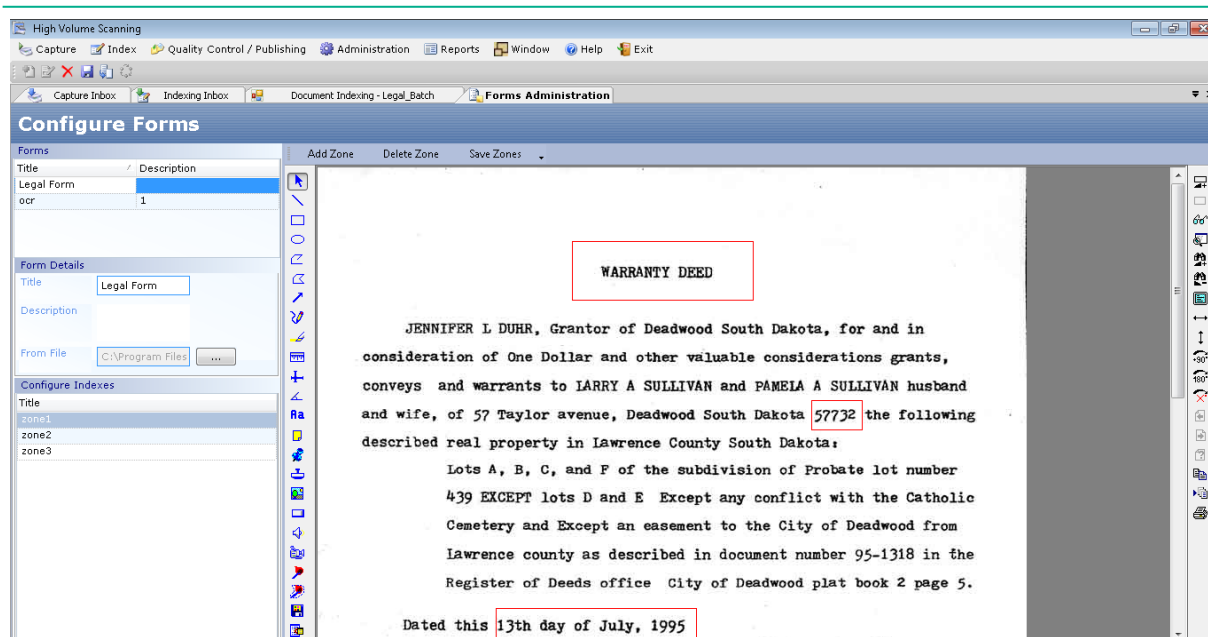
Figure 6: OCR Zones

1.1.4.5. QC/ Publishing Features

Integrated standard quality control process

The QC agent has 3 levels of validation he/she can work on:

- Batch level validation
- Document level validation
- File level validation

A set of pre-defined baskets: The re-scan and re-indexing inboxes are available to users (according to a security rights context)

If the QC agent requires enhancements on the document level, the batch will be redirected to the re-indexing inbox

If the QC agent requires enhancements on the file level, the batch will be redirected to the re-scan inbox.

This validation cycle is fully integrated within everteam.capture forcing compliance with the global capture methodology implemented by Everteam.

Everteam solutions publish support

This functionality targets directly the everteam solutions various ECM and vertical solutions to enable a smooth migration to those platforms.

PDF publishing

When publishing the batch documents pages, the Publish agent has the option to merge those pages as one PDF file thus ensuring the compatibility with international ECM standards regarding PDF adoption.

1.1.4.6. General Features

Business driven security context

In everteam.capture, the roles are pre-defined according to EVER capture methodology hence you will have:

- The capture role
- The index role
- The QC role
- The administration role
- And many other roles

Each role has a set of pre-defined and unchangeable set of functionalities defining clearly each assigned user's responsibilities

Multilingual Support

Everteam.capture interfaces can be set to one of the below languages:

- English
- Arabic

A dictionary feature allows the translation of any interface related label/expression/message

Out-of-the box reporting capabilities

For tracking daily productivity and generate statistics concerning every aspect of the capture process, everteam.capture implements a set of pre-defined reports that allow the management to get a global view on the:

- Users productivity
- Quality control pass/fail ratio
- Number of scanned papers for a given duration and others

These reports will help the management pinpoint the problems in the production environment and work towards enhancing the work procedure with a foresight to the strategic goals the company tends to reach.
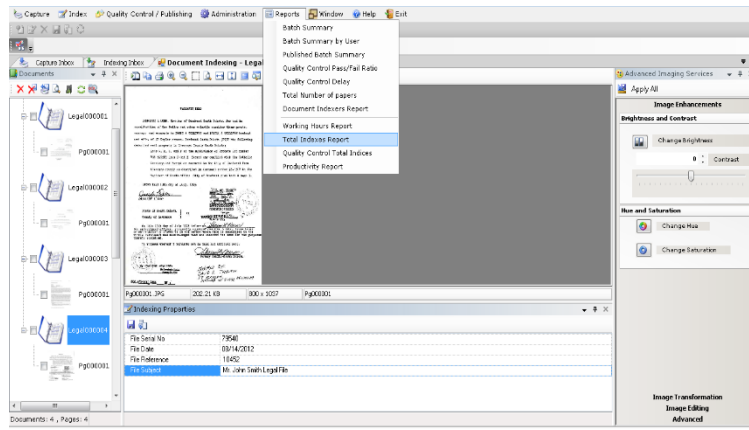
Figure 7: everteam.capture Reports