

Capture to Intelligence

TRANSFORMING WORKFLOWS WITH AI-DRIVEN
BUSINESS AUTOMATION



Your host

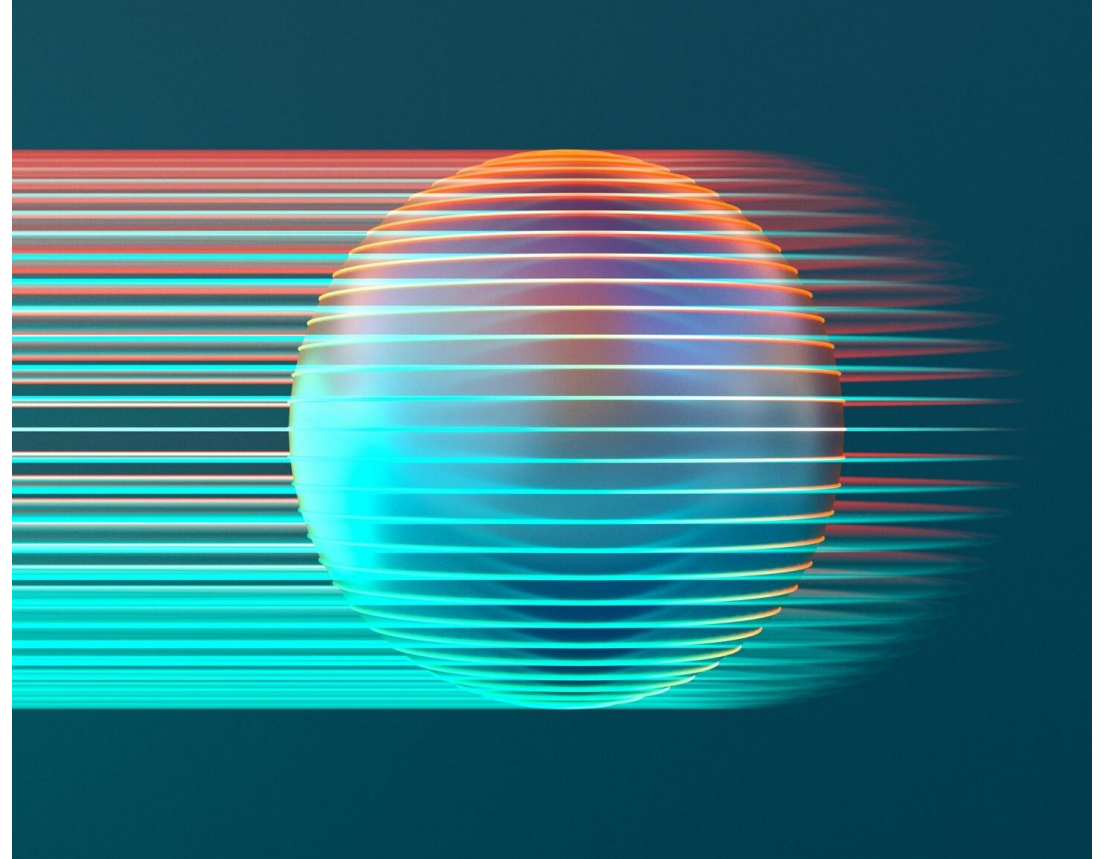


Agenda

- Welcome & Introductions
- The Challenge: Data Overload
- AI, IDP, & DMS: Definitions and Evolution
- Solving Real-World Workflow Problems
- DocuWare IDP VS ChatGPT: What's Right for Your Business?
- Building Your Automation Roadmap
- Q&A

The Data Challenge

- **78%** of companies are **operational with AI**, but data volumes continue to rise exponentially.
- **61%** of document driven processes still **use paper documents**.
- **48%** expect **paper volume to increase** next year



Polls

1. Do you use AI in the workplace?
2. How would you describe your current use of AI in workplace tasks?

The Process Challenge – Common Pain Points

- **Reviews & Approvals:** Slow, error-prone, email driven, hard to track
- **Compliance Requirements:** Increasing complexity, risk of audit failures, new data protection policies
- **Manual Data Entry:** Time-consuming, risk of mistakes (becoming very common use of AI)
- **Storing & Searching Information:** Siloed, way too much of it, lots of time looking for answers, integration issues, no structure

The Data Challenge – Hype vs. Impact

- AI tools are widely available, but meaningful results lag behind adoption.
- **Productivity gap:** Automation alone doesn't solve outdated processes or resistance to change.
- 66%* of new IDP projects are replacing legacy systems that can't keep up.
- **AI-driven automation is inevitable, but without practical strategies for adoption and integration, the data challenge will only grow**

“It’s one thing to use AI; it’s another to make it impactful.”

The Data Challenge

Why Existing Solutions are Failing

Top reasons for replacing legacy scanning systems:

- 17% Unable to meet current needs
- 16% Require too much external help
- 13% Difficult to integrate with business processes
- 11% Data accuracy not good enough

The Data Challenge

What are the top concerns about implementing IDP?

#1 Data privacy and security

#2 Integration with existing systems

#3 Accuracy / reliability of extraction

What is Intelligent Document Processing



Splitting



Classification



Extraction

The Promise of AI-Driven Automation

Traditional Capture

- ✓ OCR + location + pattern matching
- ✓ Very limited handwriting ability
- ✓ Changes to patterns & locations of data are programmed into the overall configuration
- ✓ Every variation has to be accounted for

AI Document Processing

- ✓ OCR + contextual understanding of the whole document
- ✓ No templates, or location, or pattern matching, variations in doc format don't matter
- ✓ If a human can read the handwriting, IDP can too
- ✓ Separation of large packets into individual documents with no prep or cover pages
- ✓ Identifying differences between similar docs

The Promise of AI-Driven Automation

AI & DMS: How they interplay

DocuWare IDP

- Handle a wide variety of doc types for any department with a single tool
- Hands off processing until there is an error
- Extract the actual data, or fail
 - Do not generate content to fill in what OCR didn't find
- Format, style, location of content doesn't impact automation, or increase dependency on IT



DocuWare Content Management (DMS/ECM)

- Centralized, structured, searchable storage
- Link retrieval to ERP or CRM
- Process Automation: compare docs/data, identify needed steps, route for human decision

The future is a seamless bridge between managing content, automating repetitive tasks, and converting unstructured data into actionable insights.

Let's look at some use-cases

DocuWare Intelligent Document Processing

Use Cases – Vendor Invoice Processing

Use Case: Purchasing, Shipping/Receiving

Value Added:

- Extract HTS codes, weights, and quantities from Entry Summaries to ensure efficient tariff payments
- Validate quotes against contract prices
- Compare order confirmations against PO's for differences
- Reading handwritten weight amounts from the truck scale to accurately receive large shipments

DocuWare Intelligent Document Processing

Use Cases – Processing sales packages

Value Added:

- Check vehicle purchase docs for missing info, correct terms, proper signatures
- Verify completeness of Credit/loan applications, or opening a new account
- Extract new Patient data from intake forms

DocuWare Intelligent Document Processing

Use Cases – Supporting customers

Value Added:

- Checking documents for complete data to process an insurance claim
- Read Service logs to find common faults or issues

DocuWare Intelligent Document Processing

Use Cases – Digitizing historical records

Value Added:

- Identify final As Built reports from building construction
- Student records archive
- Testing / quality reports from assembling aircraft landing gear

DocuWare IDP vs ChatGPT – Key Differences

DocuWare IDP vs ChatGPT – Key Differences

DocuWare IDP	Generic AI LLM
Purpose built by DocuWare for business documents	General purpose, conversational AI
Data Protection and compliance a top priority	More data please to train the AI more
Your own trainable model	Difficult, expensive, or limited improvements
Structured results, no guessing	Data could be created or hallucinated
Contact us for a custom test environment!	Readily accessible to anyone

Data Protection & Compliance in AI-Driven Workflows

Pretrained models

- Model is pre-trained by DocuWare using anonymized data
- Customer can fine tune this model by adding their own data, but it is not shared or used to train *other* models

Train Your Own model

- Fully customizable, no initial training by DocuWare
- Only your data is used in your model, data is not shared or used to train other models

Data Handling in general

- Pixel data from a section of a page (not the whole page)
- Names and alphanumeric identifiers are replaced with random text
- Position / layout data for individual words, essentially X,Y coordinates
- Anonymization is performed to federal government (NIST) standards

Identifying Automation Opportunities

- ▶ High volume of docs (shipping/receiving, customer requests)
- ▶ Staff is entering info from something into your main system (ERP, CRM, etc)
- ▶ Docs are shared across different departments in support of completing tasks
- ▶ If you currently use Capture, and wish it could do better

Build Your IDP Automation Roadmap

Assessment → Pilot → Implement → Optimize → Scaling / New Uses

1. Engage with us to help understand your business process & challenges
2. If there is potential value, *we will help you test it*
3. Integrate the data flow, and start using it
4. Improve model training, if necessary
5. Can other departments benefit from this?

Success factors: Change management, vendor support, technical skills



Q&A — Ask Us Anything

Next Steps & Resources

- Sign up for a [consult / demo](#)
- Check start.docuware.com or visit our booth for more resources

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