

## Intelligent Indexing

ProductInfo



## DocuWare Revolutionizes Paper Storage

**DocuWare Intelligent Indexing transforms document indexing into an efficient process, helping save time and eliminating the need for filing documents by hand.**

Intelligent Indexing automatically captures the most important metadata from your scanned documents and uses it to populate index fields. The system quickly learns from feedback so that recommended index words for known document types can be automatically and reliably assigned for future filing.

Designed for small to medium sized businesses that process hundreds of documents a month, Intelligent Indexing automatically captures precise pieces of information from scanned documents, turning unstructured information into a valuable resource.

### Benefits

- Electronic filing is now faster and easier than handling paper.
- Intelligent mechanisms, quickly and accurately automate indexing
- The system continuously learns from the entries made by all users.

# No need to fill in index fields again

Processing documents, whether creating file folders structures or performing data entry, is time consuming and leaves the door open for human error. It's tempting to just rely on paper documents in file folders. Just imagine if all you need to do is place your documents on a scanner or digital copier and press a button; that's it - everything is automatically indexed and stored for you - all your documents, instantly filed under the correct company name, together with similar document types and sorted by the right date. That is exactly what DocuWare Intelligent Indexing does for you.

When a new document type is first captured, simply use the One Click Indexing feature. Click on the company name and date found in your document, and select the document type from the list provided. Going forward, Intelligent Indexing learns from your entries. The next time you file a similar document from this company, the indexing criteria will automatically be applied. It only takes one click to confirm the entries.

Since indexing is performed automatically and the system learns on the fly, you can eliminate manual typing making it faster than handling paper.

The screenshot displays the DocuWare interface for a document titled 'INVOICE'. The left sidebar shows a 'Store into file cabinet "Docu-Pool EN"' dialog with fields for Company (Flying Tom), Contact, Subject/Number (393112/11), Doc.-Type (Invoice), Date (02/12/2014), and Status. The main document view shows the invoice content with indexed fields highlighted in green (very reliable), yellow (less reliable), and red (no suggested terms). The 'Flying Tom' field is highlighted in yellow. The 'Date' field is highlighted in red. The 'Invoice No.' field is highlighted in red. The 'Date of Invoice' field is highlighted in red. The 'Comments and/or special Instructions' section is empty. Below the invoice content is a table with the following data:

Customer No.	Project No.	Order No.	Order Date	Delivery Date	Invoice No.	Date of Invoice
100347	DE2005011	393112	02/02/2014	02/02/2014	393112/11	02/12/2014

  

ID	Article	Quantity	Unit Price (US\$)	Discount	Amount(US\$)
8	Double Corkscrew (Inverted)	1	1.260.000,00	0,00%	1.260.000,00
2	Cobra Roll (Inverted)	2	690.000,00	0,00%	1.380.000,00
24	Roll Over (Inverted)	2	450.000,00	0,00%	900.000,00

Intelligent Indexing color-codes documents in DocuWare to show the level of reliability of the recommended index words which it has identified: green for very reliable, yellow for less reliable, and red if there are no suggested terms. The index words used are highlighted on the document.

# Use as a Web-based Service or Locally on Your System

There are two different versions of Intelligent Indexing. Choose the best solution for your company.

## Web-based service

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Use Intelligent Indexing as a Web-based service and take advantage of indexing by other users. For example, if the letterhead of a company – including date and address field – has already been entered in the system, this structural information can be utilized by other users. Nobody needs to lift a finger to file a document from the same company! The Web-based service expands its knowledge and increases filing precision as each new document is entered. This is known as "crowd learning". Naturally, only general structural data are used collectively. The content of your documents remains strictly confidential.

## Locally installed

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Even if Intelligent Indexing is installed as an additional module in your DocuWare system, it still continuously learns from your entries and those of your colleagues. In this version, all the data remain in your DocuWare system and you can process as many documents as you like.

### Benefits of the Web-based service

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- Crowd learning – benefit from the indexing of other users
- Purchase flexibility by month and based on the volume of documents
- Included in DocuWare Online

### Benefits of the add-on module

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- Self-learning system within your company
- Unlimited use after one-time purchase
- Data transfer only within your DocuWare system



Video about Intelligent Indexing  
<http://www.youtube.com/watch?v=EoAH9zTq9rA>

## Functions

- Suggests new index values
- Traffic light color coding as an indicator of the level of reliability (per document/index field)
- 11 standard fields with intelligent learning: depending on version – crowd learning or company intelligence (document type, date, company, contact person, customer number, date payable on, document number, amount, VAT ID, subject)
- 10 user-definable fields with intelligent learning (6 text, 2 date, and 2 amount fields)
- Document type description adaptable to company norms, for consistent terminology across multiple systems
- Index suggestions compared with external lists, e.g. from the ERP system, for consistent data with other systems

## System Requirements for Local Installation

- In combination with DocuWare from version 6.1 on
- The Windows Server 2012 R2 operating system is recommended
- Server hardware:
  - Quad-core processor (e.g. Intel Core i5)
  - 8 GB RAM



This document can also be found here:

<http://pub.docuware.com/en/intelligent-indexing>

For more information please visit our website at

[www.docuware.com](http://www.docuware.com)