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AI-Augmented Capture from OpenText

Improve operational efficiency by eliminating unnecessary manual tasks

Automate processes to increase operational efficiency

Reduce risk due to human error and other factors

Support business transformation to improve organizational knowledge

All large organizations produce and receive a staggering amount of information—some 2.5 quintillion bytes of data every day[1]. For most organizations, capturing and routing that information to the right group or repository based on context and priority is a manual process. But, customers and partners increasingly expect to interact in a fast, automated and intelligent way, whether they are placing an order, disputing a bill or just seeking information.

AI-Augmented Capture from OpenText offers automated and accurate processing of paper and electronic documents from the moment content enters the enterprise through to its final destination. AI-Augmented Capture helps reduce delays and costs and increases employee and operational efficiency.

AI-Augmented Capture is powered by the artificial intelligence (AI) of OpenText™ Magellan™ and the OpenText™ Captiva™ intelligent capture platform. It integrates natural-language processing (NLP), context processing and AI-based analytics.

Adding to the foundation of intelligent capture, artificial intelligence enhances the ability to read and understand text within documents, generate insights that improve decision-making and automate processes based on those decisions. AI-Augmented Capture digitizes and extracts all data within content, such as claims, emails, notes, spreadsheets, social media posts and web activity logs, then applies AI to understand and differentiate documents contextually and route them to the appropriate workflows. It does this through a combination of concept identification (name versus place, for example), entity extraction (identifying proper names and dates within a sentence) and sentiment analysis. To ensure information is understandable, the solution provides dashboards and reports that visualize KPIs around the capture process, so business owners can drive higher operational efficiency.

1. Forbes. How Much Data Do We Create Every Day? The Mind-Blowing Stats Everyone Should Read (May 21, 2018)https://www.forbes.com/sites/bernardmarr/2018/05/21 how-much-data-do-we-create-every-day-the-mind-blowing-stats-everyone-should-read/#6c3142cf60ba

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A major Financial Services company receives tens of thousands of items in the mail every day, and for a number of years has used a dedicated team to process incoming mail, scan every document, determine its purpose and route it to the appropriate department. Using AI-Augmented Capture from OpenText will allow the company to run a leaner team whose job is to focus on the outlier cases.

A multinational company is using AI-Augmented Capture from OpenText to smooth out the crucial customer onboarding process. The solution ensure that application documents are indexed, classified and routed properly and assess risk based on information in the application. It also adds appropriate metadata to ensure that support teams have the information they need to complete the on-boarding process in a timely manner.

Consider an incoming document captured in the mailroom—is it an account application or a complaint about an order? If it is the latter, can the complaint response be automated or does it require a human response? If it requires someone to respond, who is the best person to do so? If it requires manual handling, what process should be invoked and where should the correspondence and response be archived?

AI-Augmented Capture uses natural-language elements, such as sentiment along with institutional knowledge, to understand the purpose of content and what steps to take regarding that content. It combines a human's ability to understand, contextualize, make decisions and act with a computer's ability to automate those processes rapidly and error-free, improving customer experience and increasing business transformation.

> AI-Augmented Capture from OpenText brings natural-language processing (NLP) to information management in a practical way, automating proces- ses like capture and helping employees be more efficient. According to McKinsey & Company, "Improving natural language capabilities alone could lead to an additional $3 trillion in potential global wage impact."[2]

Automate processes to improve efficiency and talent retention

AI-Augmented Capture enables contextual understanding of data, ensuring documents are indexed, classified and routed appropriately and provides machine-initiated workflow. It automates tasks that usually require human understanding, decision-making and action, such as analyzing documents and archiving or routing them to right person or process. By reducing the need for employees to perform rote tasks, AI-Augmented Capture improves their productivity and frees them for higher-value activities, such as providing customer service, which contributes to talent retention.

Reduce risk due to human error and other factors

Human error in transcribing information or routing documents is common and responsible for delaying responses, degrading customer experience and decreasing efficiency. While AI-Augmented Capture is designed to solve this problem, it also enables predictive analysis to determine risk that may not be immediately apparent to people involved in a process. It can also pinpoint problems in a workflow, for example, when a key stakeholder has become a bottleneck, and either re-route or reprioritize certain steps. AI-Augmented Capture can also be used to look for signs of fraud or illegal activity and take appropriate action, allowing employees hired for this purpose to focus on outlier cases.

2. McKinsey Global Institute (McKinsey & Company). The age of analytics: Competing in a data-driven world (December 2016) https://www.mckinsey.com/business-functions/mckinsey-analytics/our-insights/ the-age-of-analytics-competing-in-a-data-driven-world

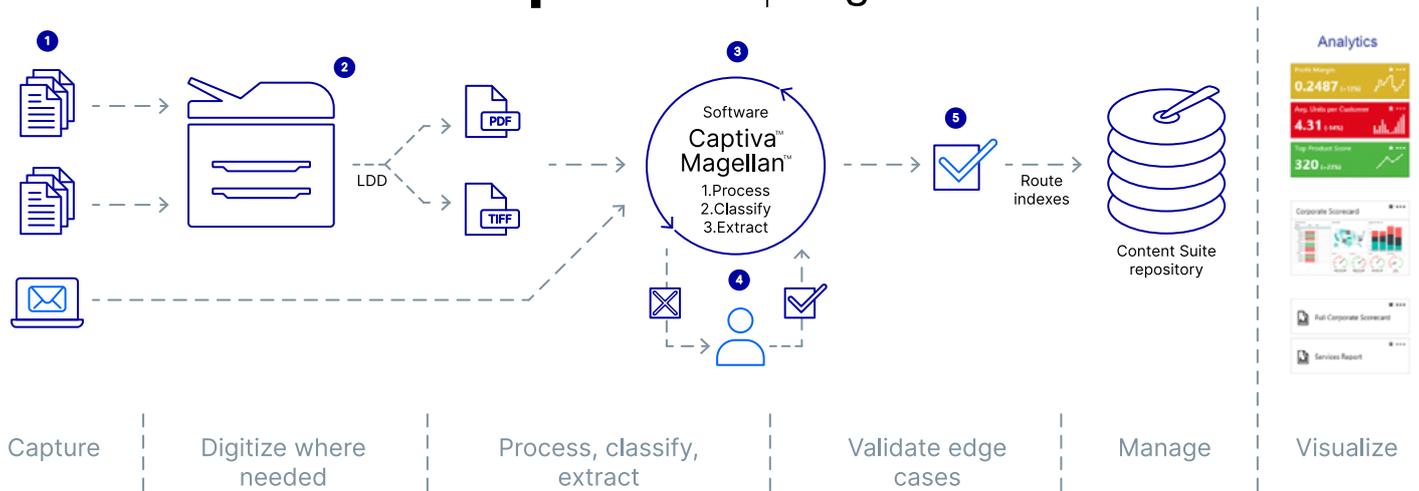## Support business transformation to improve organizational knowledge

Content capture will be a key focus as businesses continue the journey from paper-based, manual tasks to automated, digital and intelligent processes. AI-Augmented Capture increases organizational knowledge by:

• Expanding the amount of information extracted from newly captured content.

• Ensuring that metadata is extracted and used as part of the classification of newly captured documents.

• Improving processes, such as search and automation, which depend on content metadata.

This means that AI-Augmented Capture is part of a continuous alignment of content management (metadata + taxonomy) with how the organization runs. Enhancing metadata also improves content analysis and reporting, which management can use to improve operations.

AI-Augmented Capture—How it works

| Capture | Digitize where needed | Process, classify, extract | Validate edge cases | Manage | Visualize |

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Evolution of capture technology

Basic capture	Intelligent capture	AI-Augmented Capture
• Image clean-up	• Capture workflow	• Machine-initiated workflow
• Optical character recognition	• Machine learning for classification	• Contextual understanding of data (i.e. sentiment analysis, natural language processing)
• Index creation	• Machine learning for workflow	• Actionable, clear insights
• Classification	• Handwriting recognition	• Predictive analytics of document types
		• Prioritization of captured content in workflow

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