ezescan.
making digital work

Email / Form Record Capture Automation

SOLUTION BENEFITS:

- ✔ Batch processing of emails as records.

- ✔ Batch processing of forms data received as structured email.

- ✔ Power indexing capabilities, reducing your data entry and saving you time.

- ✔ Automated or operator assisted workflows via EzeScan Server or Desktop.

- ✔ Connect and import email from Mail Server via IMAP or POP3.

- ✔ Output as native eml format, preserving integrity of header data and attachment formats.

- ✔ Optional output as rendered PDF/A text searchable file, combining both header data and supported attachment formats.

- ✔ Out-of-box native integration with many leading EDRM and content management systems.

Take the hard work out of capturing emails as records!

EzeScan's Email / Form Record Capture (ERC) solution provides Records Professionals with the same EzeScan batch processing and power indexing capabilities previously only available for registering scanned documents. Capture and index both header information and attachments including digital form data seamlessly into your EDRMS.

Email / Form Record Capture

ERC can be added to both desktop and server configurations for operator assisted or automated email capture workflows. Unlike other email capture products, ERC addresses the needs of Records Professionals by providing batch processing and power indexing capabilities with seamless integration to many leading EDRM and content management systems. Reduce or even eliminate manual data entry typically associated with the capture of digital forms data received as structured email.

Workstation Solutions

As a desktop solution, an operator can import emails in batches or process selected emails one at a time. A quick view feature assists in the selection of emails. EzeScan's power indexing wizard guides an operator through the registration process. In many cases, the email header data can be used to automatically register an email. For more detailed indexing requirements, additional data can be captured via zonal OCR or use of the OCR pen. Perform database lookups on the fly or select field data via drop down menus. Define and reuse static metadata to limit the number of keystrokes or eliminate them altogether to deliver impressive productivity gains. Output the email record either in its native eml format, preserving the integrity of header data and file attachment or optionally render the email as a PDF/A text searchable file, combining both the body of the email and the attachments.

Server Solutions

As a server solution, ERC allows you to automatically register emails as a record. Email header data can be used to register an email automatically. For example the subject line might contain a reference number that corresponds to a filing location in your EDRMS. Output the email record either in its native eml format, preserving the integrity of header data and file attachment or optionally render the email as a PDF/A text searchable file, combining both the body of the email and the attachments. Process large volumes of email as records without operator intervention at speeds previously unattainable.
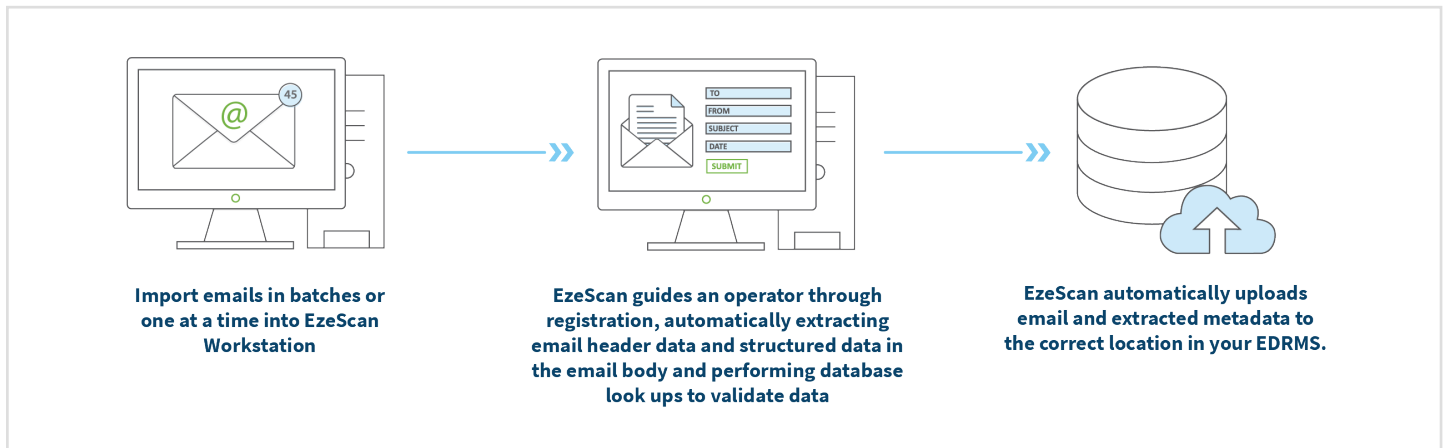
Native Output vs Rendered Output

When processing emails as a record (preferred option by Records Professionals) the attachments are kept within the eml file in their original native formats. Whereas when selecting 'output as a rendered PDF' each supported attachment type (.doc, .docx, .xls, .xlsx, .ppt, .pptx, .txt, .bmp, .gif, .png, .tif, .jpg, .pdf) is appended to the PDF. This PDF contains the rendered email header page followed by the rendered attachment pages.

Deployment & Licensing

Flexible deployment and licensing options are available to suit your needs. The ERC module can be added to an existing/new EzeScan desktop licence (named or concurrent) configuration or added to an existing/new EzeScan Server licence (named).

Desktop Scenario

Import emails in batches or one at a time into EzeScan Workstation

EzeScan guides an operator through registration, automatically extracting email header data and structured data in the email body and performing database look ups to validate data

EzeScan automatically uploads email and extracted metadata to the correct location in your EDRMS.

SERVER Scenario

To: Bob
From: Mike
Subject: Contract
Date: 22/04

Operator Validation

EzeScan Server polls dedicated mail boxes for incoming invoices

EzeScan server automatically extracts email header information and structured data from digital forms in the email body

EzeScan automatically uploads email and extracted metadata to the correct location in your EDRMS