

# Document Automation

Get fast access to business-critical, automation-ready data for improved customer service



## Harness the power of your data with intelligent document processing

Data is the backbone of every successful organization. Businesses that can rapidly harness their data are better at decision making, continually strengthen performance and continuously improve their customer experiences.

### But what if you can't access that data easily and quickly?

That's the case for many companies with critical information locked inside documents like invoices, loan paperwork, regulatory forms, insurance claims, receipts and health records.

With **SS&C | Blue Prism® Document Automation** at the forefront of your automation strategy, your data is immediately extracted from skewed and low-quality faxes, scans and images, PDFs and handwritten forms, then prioritized, contextualized and routed to fit directly into your business processes.

That means higher processing accuracy rates, faster turnaround times and lower costs to scale.

## What is Document Automation?

Document Automation uses computer vision, AI, and machine learning to digitize, classify and extract information from low-quality images, faxes and scans, PDFs and handwritten documents and quickly turn it into decision-ready data.

### DOCUMENT AUTOMATION IS:

- 1. Easy to deploy.** Document Automation's low-code data digitization platform is a cloud-based service that requires no model training, extended IT development or high-tech engineering to bring it into production.
- 2. Simple to use.** Document Automation's intuitive UI was built with business users in mind, so it's uncomplicated and easy to use.
- 3. Quick to ROI.** Document Automation's machine learning model is trained on over 1.2 billion human-verified data points – the largest in the industry – which results in 98%+ field level accuracy and up to an 80% reduction in manual processing.

**“Document Automation’s AI-powered engine makes the decision to implement automation a no-brainer by relieving organizations of the burden of manual workflows. Intelligent automation is now within everyone’s grasp.”**

— Accenture

## Why Document Automation?

- **Speed and accuracy.** Accepts end-customer information in any form and extracts data faster and more accurately than humans.
- **Straight-through processing.** Intelligently extracts, prioritizes, contextualizes and routes data directly into your current business processes so you can eliminate manual steps and seamlessly automate across the enterprise.
- **Scale and integration.** Integrates with SS&C Blue Prism’s existing automation tools like BPM and RPA, and scales to meet throughput demands of the largest and most complex workflows.
- **Flexibility.** Easily fits into existing systems, serving as a critical link between the mailroom and digital portals and CRMs, enterprise content management systems and business process management engines.

### Delivering continuous value with Document Automation

**98%+**

Average field-level document extraction accuracy

**80%**

Reduction in manual processing

**1000x**

Faster than people

**50%**

Increase in straight-through processing

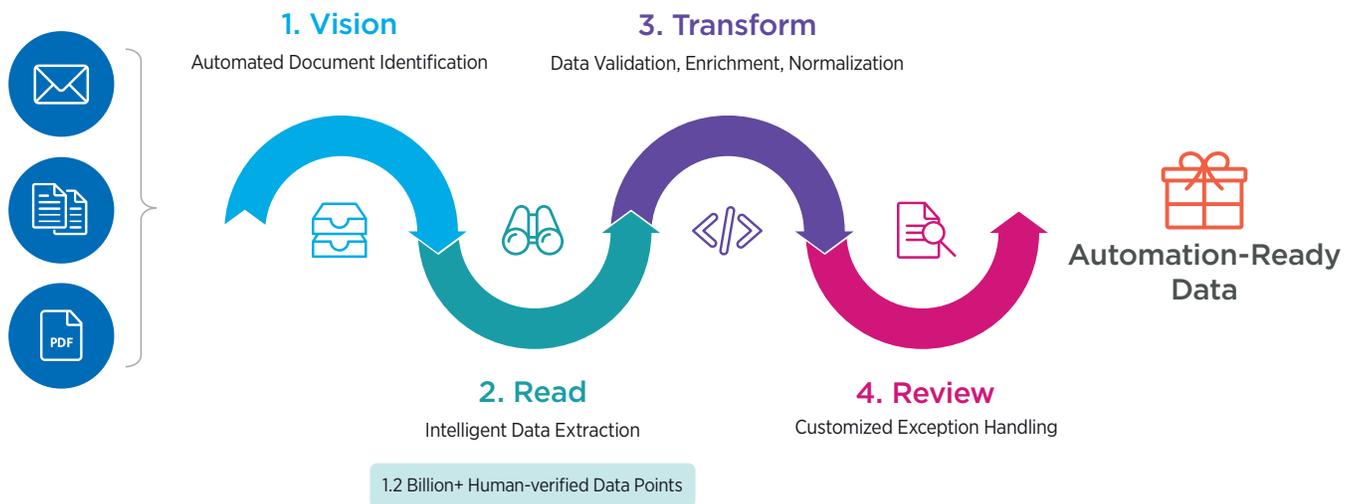
**Document Automation enabled us to pilot [their] technology much faster than [previous] solutions, which is why we’ve been able to test the platform and roll it out wider across the organization in only a few short months.”**

— New York Life



## How does it work?

With Document Automation, you can continuously extract data from new documents as they come in to save time, reduce costs and digitize historical data to feed machine learning models or provide a searchable repository.



**1. VISION.** Computer vision matches incoming pages to form templates. It flips, rotates, deskews and zooms to find the best matching template. No pre-sorting is needed.

**2. READ.** Field data is read and extracted into a structured format using pre-trained ML models.

**3. TRANSFORM.** Data, including names and addresses, are parsed, validated, enriched and transformed according to client-defined rules.

**4. REVIEW.** Exceptions are handled based on preset confidence levels for each field. Once validated, results are routed directly into existing business processes.

### Key Benefits

- Exceed response-time expectations
- Optimize your operations, reduce processing times and cut costs
- Automate repeatable tasks and eliminate processing errors
- Improve compliance and data security
- Scale your automation end-to-end across the enterprise



### Key Features

- Cloud-based for unlimited scalability
- Unparalleled accuracy for maximum straight-through processing
- Fast access to business-critical, automation-ready data
- Expands to support enterprise workflows
- Supports English and Latin character-based languages
- Trained on over 1.2 billion human-verified datasets
- Optimized for SS&C Blue Prism technology including BPM and RPA, and easily integrates with other third-party systems

# Document Automation in Action: A Case Study

## Challenge

SS&C Blue Prism was asked by a large insurance company to achieve automated indexing and form classification for one of its mailrooms. Expected average volume was **5,000 pages per hour** across **800 different form types** with significantly higher seasonal peak volumes.

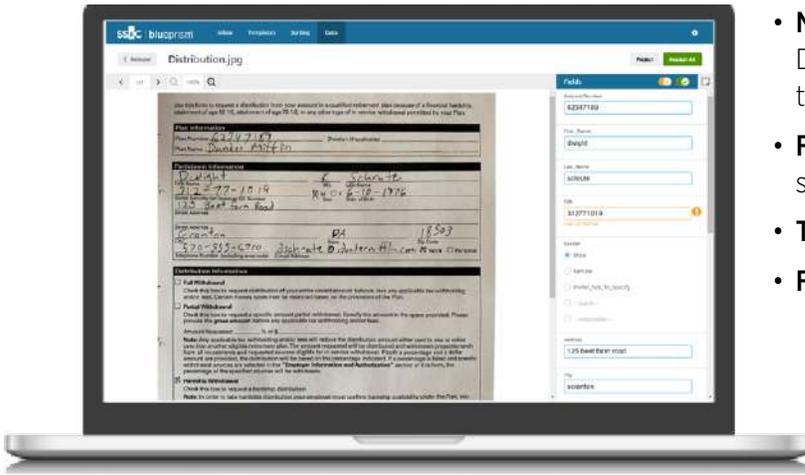
Dealing with these volumes manually and matching resources to seasonality was costly. And pay was competitive due to high cognitive load. High turnover also presented an issue.

## Solution

Document Automation used the VISION engine to quickly identify and reorder forms, and extracted typed and handwritten data, **replacing six of eight mailroom tasks at 98% accuracy.**

## Results

- **Clear ROI:** The accuracy threshold for a positive ROI was 90%. Document Automation's delivered between 96-98%.
- **Better error tracing:** All mistakes were digital and trackable, making them easier to find and fix.
- **More secure:** Data transfer between the client and Document Automation used state-of-the-art file transfer technology.
- **Flexible:** The system scaled up and down for seasonality with ease.
- **Tireless:** This client setup ran 24/7/365.
- **Faster turnaround time:** <15 minutes on average.



Start your digital transformation journey by speaking with one of our intelligent automation experts. Please indicate your industry or area of interest so we can best assist you.

[Get Started](#)

## Contact Us

Email us at [bpm-contact@sscinc.com](mailto:bpm-contact@sscinc.com) to learn how SS&C Blue Prism can help your organization realize transformational business value with intelligent automation.



SS&C Blue Prism allows organizations to deliver transformational business value via our intelligent automation platform. We make products with one aim in mind – to improve experiences for people. By connecting people and digital workers, you can use the right resource, every time, for the best customer and business outcomes. We supply enterprise-wide software that not only provides full control and governance but also allows businesses to react fast to continuous change.

Exceed customer expectations, stay competitive, accelerate growth.

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