



# The Ultimate Guide to Intelligent Document Processing (IDP)

How to fully automate your document processing with artificial intelligence and IDP

An abstract background pattern of light gray lines and dots, resembling a circuit board or network diagram, located at the top of the page.

## Table of Contents

|                                                          |    |
|----------------------------------------------------------|----|
| Introduction                                             | 3  |
| Research insights                                        | 4  |
| The basics of IDP technology                             | 5  |
| 5 reasons automation should be at the top of your agenda | 6  |
| How to choose the right IDP solution                     | 8  |
| Conclusion                                               | 10 |

## Introduction

C-level executives are focused on accelerating **digital transformation** to improve processes, cut costs, free up staff from time-consuming manual tasks and strengthen business agility. [Research from PwC reports](#), a global professional services firm, indicates that using automation to capture and organise unstructured data can save 30-50% of the time spent compiling data from different teams, departments or locations. Centralised data storage and systems integration also contribute to this increase in productivity.

It's estimated that 80% of the business data in the enterprise is in an unstructured format. Many automation strategies face significant challenges because they lack the technology to capture this data consistently and efficiently. Unstructured data includes emails, incoming invoices from different vendors, delivery notes and documents with handwritten annotations. In contrast, structured data is well-defined, and data elements always appear in the same location. Examples of structured data include financial records, spreadsheets and information from web forms.

DocuWare Intelligent Document Processing (IDP) quickly processes unstructured data from your documents even if they include handwritten notes or are damaged. IDP also understands and extracts information in context using artificial intelligence (AI) and machine learning, a subset of AI.



# 80%

of business data is  
in an unstructured  
format

---

# 30-50%

less time spent on  
compiling data from  
different teams



## Research insights

In a recent Deloitte study on intelligent automation, executives rated their progress in automation compared to an "ideal organisation."

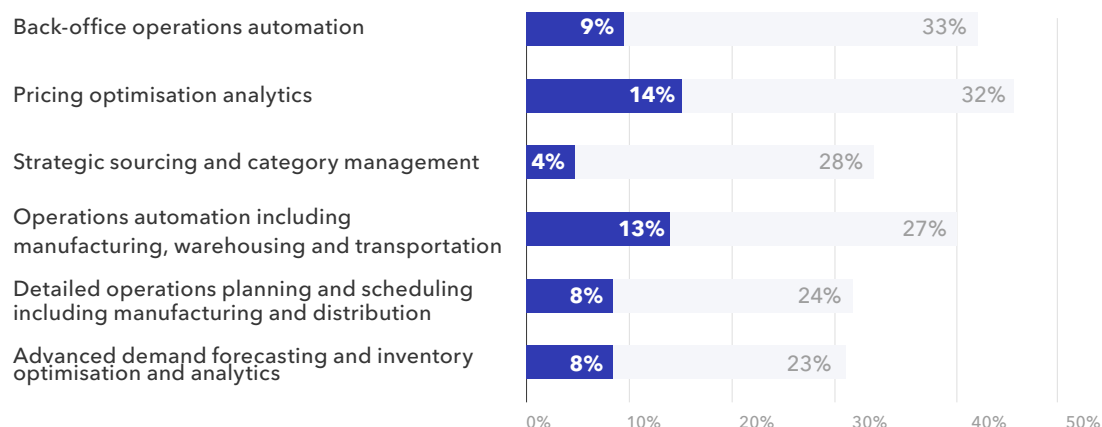
The executives rated themselves with an average score of **5.04 out of 10** for intelligent automation in the years 2021-2022, indicating a significant gap. Many believed that their progress was about 50% behind the ideal. CFOs are placing greater emphasis on automation to reduce costs. In a July 2022 Gartner study, **98%** of CFOs said **accelerating digitisation was their top priority**.

# 50%

of executives believe they are behind their 'ideal organisation'

# 98%

CFOs prioritising digitisation



*Digital Investments CEOs & CFOs believe will improve performance efficiency*

“Automating back-office workflows is key to driving efficiencies in a number of areas, including accounts payable, accounts receivable, and internal IT services such as help desk support.

RANDEEP RATHINDRAN | Vice President for Research, Gartner Finance Practice

Gartner

# The basics of IDP technology

With DocuWare IDP, your company can realise the potential of AI-driven automation. It converts unstructured information into a structured format. This means every document-centric process can be streamlined, and data is readily at hand for reporting and analysis.

DocuWare IDP provides advanced document classification, precise data extraction and powerful processing, which boost automation and cut costs. It integrates optical character recognition (OCR) and handwritten text recognition (HTR) with AI and machine learning (ML). It leverages machine learning models to imitate human thought processes. These models are trained to enable accurate categorisation and data extraction. They recognise patterns and predict outcomes similarly to how humans learn from experience.

IDP also uses deep learning, a ML method that uses complex algorithms called neural networks. Additionally, natural language processing (NLP) allows IDP to understand human language, while computer vision algorithms learn patterns by analysing vast amounts of data to identify relationships within the information.

Advanced optical character recognition kicks off IDP workflows by identifying key data points on the document, such as document type and splitting locations. Then documents are automatically classified based on their content or properties. This determines the extraction steps, which assign key data to index fields more accurately and quickly than manual data entry. The solution's validation capabilities check and match documents and data and route the documents through designated workflows.



Automated  
classification reduces  
manual intervention



OCR extraction  
enhances data  
accuracy



HTR enables  
access to hand-written  
data points



Hands-off batch  
splitting optimises  
efficiency



Pre-built models  
minimise training  
effort



Training model  
increases  
automation rates

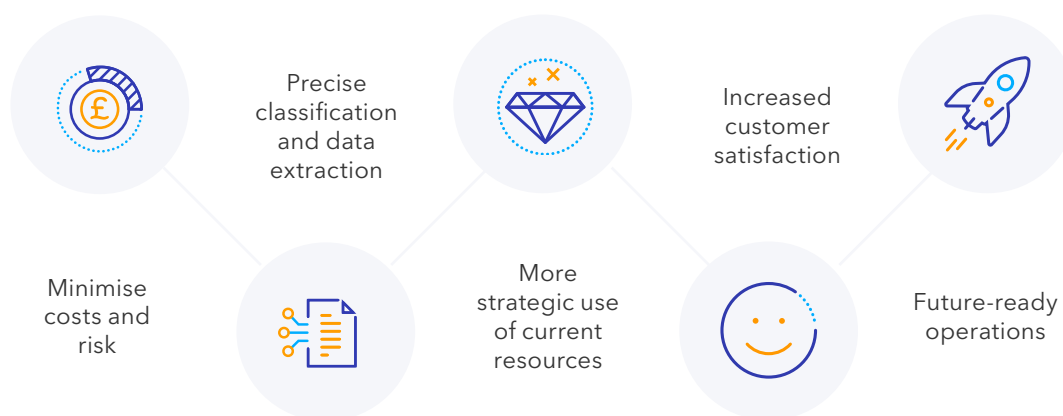


Fully web-based  
solution simplifies  
secure integration



Scale your business  
with the same or fewer  
resources

## 5 reasons automation should be at the top of your agenda



1

### Minimise costs and risk

Intelligent document processing offers companies the opportunity to significantly reduce the risks associated with manual document processing. Using technologies that specialise in data processing, inaccuracies can be **reduced by up to 67%**, eliminating the time-consuming and costly process of error correction.

### Precise classification and data extraction

IDP handles almost every document type and format, including tables, timesheets and text blocks. It improves operational efficiency by automating the extraction, classification and export of data into your workflows using pre-built or customised machine learning models. Pre-built models are trained on documents that are common to the process you're automating and to your business sector. They are ready to use and can be fine-tuned if necessary. Customised configurations meet your individual requirements.

2

A circular graphic with a blurred background of a document and the number 3 in the center.

## More strategic use of current resources

Automation can significantly optimise workflows and reduce time spent on routine tasks. Smoother workflows enable companies to handle a greater volume of work with the same or even fewer resources.

### IDP is particularly helpful when:

- Managing processes impacted by security and compliance standards
- Capturing data from crumpled or stained paper documents
- Recognising handwriting or identifying information in complex data positions

## Increased customer satisfaction

Companies that use outdated, manual methods and neglect data privacy protection jeopardise customer loyalty. For example, if there are delays in processing insurance or mortgage applications, customers may opt for competitors that employ modern technology. Intelligent document processing provides accurate and organised information that leads to faster and more efficient interaction with your customers. This, in turn, provides a better customer experience and increases their lifetime value.

A circular graphic with a blurred background of a document and the number 4 in the center.A circular graphic with a blurred background of a document and the number 5 in the center.

## Future-proofing your company

Expand and scale your business without the need for additional staff or more resources in a volatile economic climate. As technology continues to evolve, companies that embrace automation now are better equipped to successfully meet future challenges and opportunities. With advanced automation, you can lay the foundation for long-term success.

# How to choose the right IDP solution



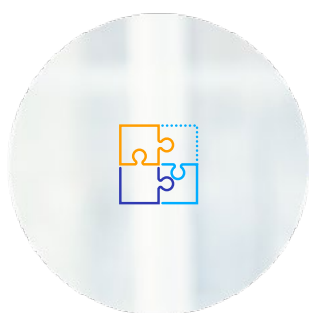
## Ease of use

Platform usability plays a critical role in the success of your automation projects. DocuWare IDP's intuitive configuration and AI model training interfaces simplify ongoing process improvement. In addition, the solution runs in the background, which eliminates the need for end-user training. As a result, your accounting team benefits from the elimination of time-consuming, manual tasks, increased accuracy and faster processes without a learning curve.

## Human-in-the-loop

Modern IDP systems leverage the power of human-in-the-loop (HITL) functions to provide quality control, deftly manage exceptions, enable continuous improvement and enable your staff to use their expertise to refine processes. Without HITL, precision and reliability can be compromised, which could drive up costs in subsequent data correction phases.



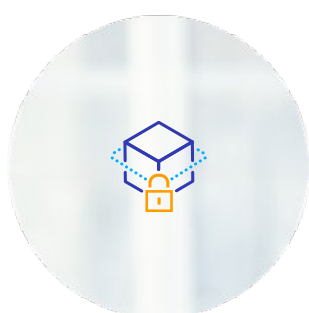


## Pre-built and custom machine learning models

Pre-built models are easier to implement, resulting in faster completion of your automation projects. Custom machine learning algorithms create configurations tailored to the unique needs of your business or industry. These models are trained on your data sets and are closely aligned with your goals.

## Extensive support services

Your software vendor should provide training and be readily available for post-implementation support. Software documentation should be clear and concise. The company should also host customer forums, provide instructional videos, blog posts with tips and tricks and a searchable knowledge base.



## Comprehensive security

Prioritising data privacy and security is essential. The software vendor should adopt proactive strategies that meet the highest standards. It's critical to enforce data security and privacy through encryption and stringent controls, adhering to standards like GDPR.

The IDP solution should protect documents from unauthorised access and create audit logs to support regulatory compliance. AI-based data processing and data transfers should be conducted using secure HTTPS encryption, which protects the data from unauthorised access during transmission.

## Conclusion

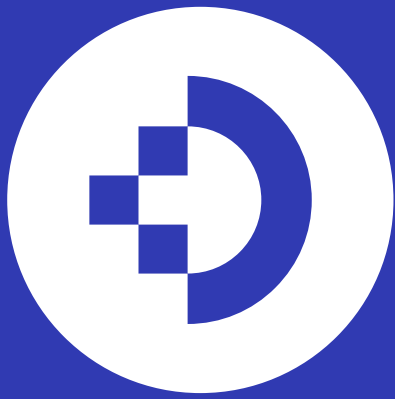
DocuWare IDP stands out because of its outstanding performance at companies like yours. It's the right solution for organisations eager to embrace cutting-edge technology and streamline error-filled and labour-intensive manual processes to achieve greater efficiency. Implementing IDP prepares your organisation to adapt quickly to innovations in automated workflow, data management and business strategy. DocuWare IDP is an essential tool for companies looking to stay competitive in an increasingly digital world.



## Would you like to test DocuWare for Intelligent Document Processing for free?

- ✓ **NO CREDIT CARD REQUIRED**
- ✓ **100 TEST DOCUMENTS AVAILABLE**
- ✓ **ACCESS TO ALL PRETRAINED AI MODELS**

**Simply register here**



#### About DocuWare

**DocuWare is a leading provider of document management and workflow automation solutions. Together with its 800+ strong Partner network, DocuWare has helped approximately 20,000 customers across 100+ countries simplify their work through digitising, automating and transforming key processes.**

[start.docuware.com](https://start.docuware.com)