

Intelligent Forms Processing with IDA

Forms processing serves as a prerequisite for numerous downstream tasks within enterprises, such as document archiving, customer service, accounting, and other purposes. The primary goal typically involves extracting data from pre-defined fields in semi-structured and structured documents, including both machine-print and handwriting.

Discover how the IDA software suite excels at simplifying and streamlining data capture from forms.

Reduce manual efforts

Outstanding text recognition accuracy for the most difficult scenarios, including handwriting

Minimize maintenance

Low-effort training for changing document layouts

Ensure compliance

On-premises or private cloud deployment

COMMON CHALLENGES

Manual forms processing is not only labor-intensive and costly, but also **prone to errors**, which become even more significant as document volumes rise. Rule-based automated solutions often fall short in terms of scalability when attempting to adapt to **evolving document layouts**. Moreover, the implementation and upkeep of rules can be exceedingly costly. As a result, enterprises often struggle with **extended average processing times**, leading to a poor customer experience and, ultimately, higher expenses.

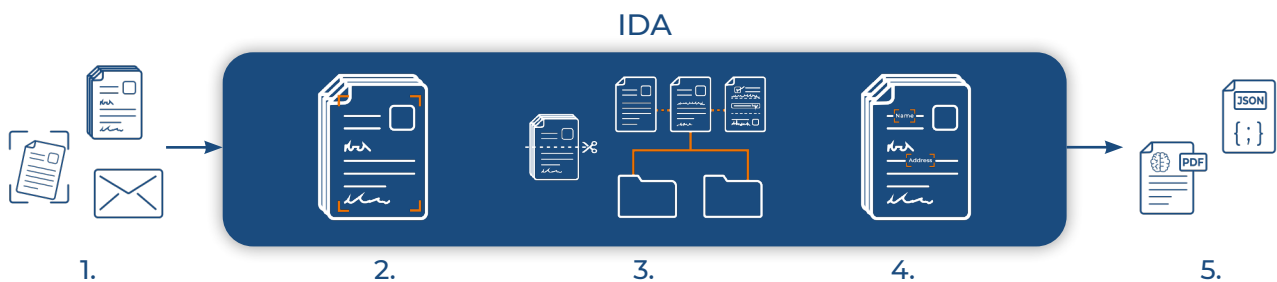
THE SOLUTION

PLANET AI's Intelligent Document Analysis enables **low-effort forms processing** of large document volumes. By combining the patented core technology with sophisticated machine learning capabilities, IDA delivers **unmatched OCR and ICR accuracy**, minimizing the need for manual correction even in the most challenging scenarios.

With its **rule-free approach to document classification and data extraction**, IDA requires minimal training data and low maintenance efforts. IDA can be deployed **on-premises or in a (private) cloud** as a Java application or containerization using Docker.

HOW IT WORKS

IDA workflow for intelligent forms processing:



1. Input: Physical and electronic documents via scanner, mailbox, email etc.

2. Recognition: OCR and ICR capability based on patented PerceptionMatrix

3. Document splitting and classification: Rule-free, few-shot learning separation of large consecutive documents and document categorization

4. Form data extraction: Zonal data extraction to capture data fields from documents

5. Output: PDF or PDF/A (all conformance levels) with text layer containing recognition results and optionally highlighted data fields and/or JSON with extracted data fields including positional information, confidence score etc.

CUSTOMER SUCCESS STORY

Forms processing is utilized in various industries and verticals that require to extracted structured data from standardized forms. These sectors encompass finance, government and public sector, healthcare, and more. Examples of such forms may include tax forms, medical records, and claim forms, among others.

Our client, a **government agency**, encountered the challenge of a **rapidly rising volume of forms** as a result of the COVID-19 pandemic. These forms included handwritten entries, poor-quality machine-print, and tables, all of which were in the form of scanned PDFs. IDA's smart zonal data extraction capabilities empowered the agency to **enhance automation**, thereby allowing them to process a substantially greater number of forms within a shorter timeframe.