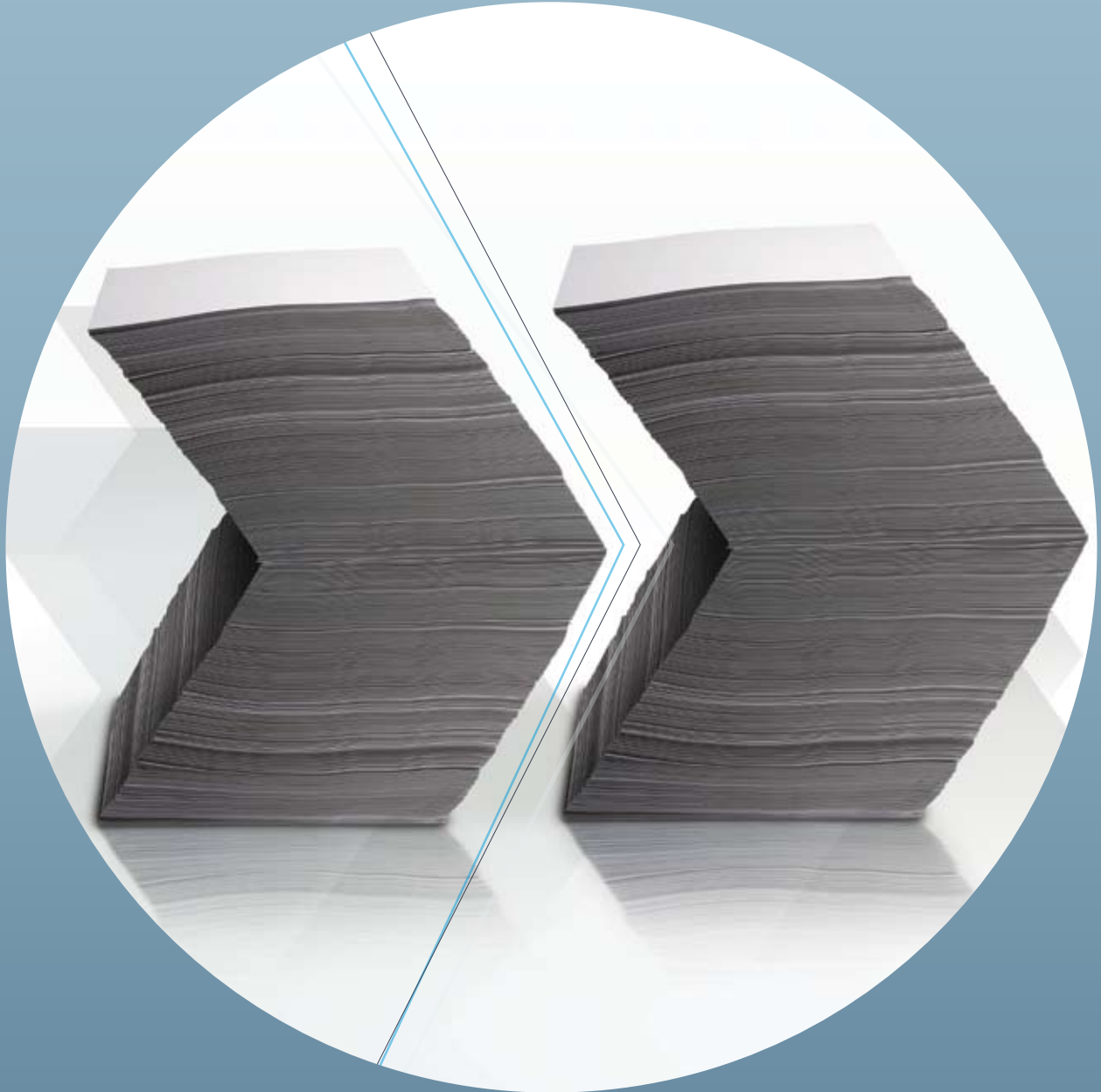


# FORMIC FUSION PRODUCT GUIDE

RAPIDLY ADVANCE YOUR PROCESSES



:01

# YOUR QUESTIONS ANSWERED

## WHAT DOES FORMIC'S FUSION SOFTWARE DO?

Formic's intelligent document recognition software, Fusion, will rapidly advance your business processes.

Most organisations commit significant resources to the manual capture of information from documents sent by third parties or created internally. Fusion automatically reads the information contained in documents whether on paper, the web, tablet PCs or PDAs then subjects each piece of data to a series of rigorous checks before transferring it to your enterprise applications. It also stores an image of the original document alongside the extracted data, for instant retrieval.

Fusion tackles the very first stage in the lifecycle of information – its capture.

## WHY INVEST IN FUSION?

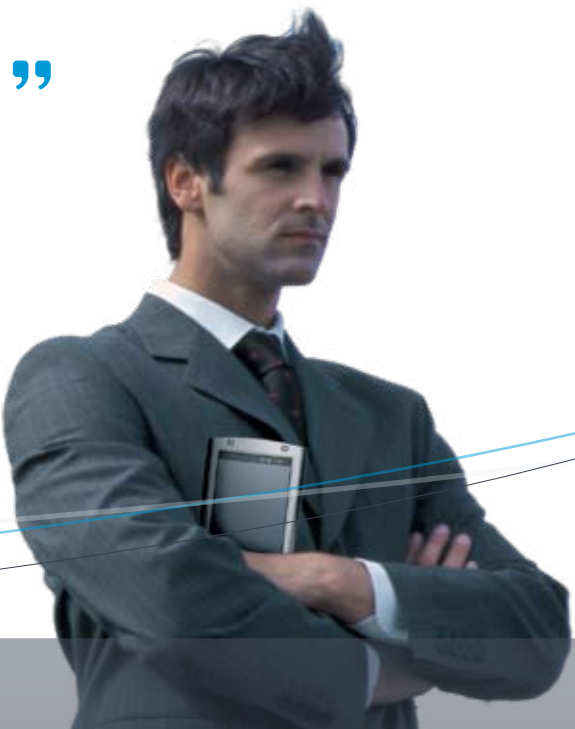
Here's a quick summary of the benefits you can expect:

**Maximise personal productivity**

For organisations looking to maximise the output of each person they employ, Fusion is the ultimate productivity tool.

Fusion processes documents at high speed, stripping out and validating the data that enables documents to be accurately classified and routed to those that need them. Deploy the software to mobile devices, enabling staff to capture information on the move, and witness a step-change in productivity at the front-line. Combine the automation of manual tasks in this way, with process reform and operational efficiency will soar.

“ Fusion tackles the very first stage in the lifecycle of information – its capture. ”



Process any document in any format arriving from any source

Software that delivers organisation-wide value must be capable of processing any document from any source. Today, Fusion is capable of processing the following document formats:

DOCUMENT FORMAT	EXAMPLES
Paper forms	Application forms, order forms, claim forms, tax forms, satisfaction surveys
Electronic forms	Same as above but deployed to the web or mobile devices such as tablet PCs and PDAs
Paper documents	Invoices, purchase orders, account statements, CVs, delivery notes, cheques, letters, reports, memos

Fusion's single information capture platform processes all document formats simultaneously. Organisations planning on moving from paper to electronic forms deployment will find this hybrid processing capability essential for a smooth transition.

**Data of the highest quality**

A lack of clean data directly affects business performance and contributes to revenue loss or wastage. Fusion software cleans data as it works; minimising transcription errors and rigorously checking the data against almost any criteria you wish to set. Fusion also checks for completeness, eliminating information gaps.

**WHICH ORGANISATIONS ARE ALREADY USING FUSION?**

The need to automate the capture of information from documents is widespread and so Fusion finds many applications throughout industry. These are a few examples:

PUBLIC SECTOR	CUSTOMER APPLICATION
Education	Exam marking, student registration, course assessment
Police	Activity analysis, stop'n'search forms, uniform requisitions
Fire	Fire risk assessment
Ambulance	Drug administration, patient records
Healthcare	Clinical audit, care pathway, patient records, nurses' diaries, medical coding, prescriptions processing, claim forms
Local Government	Housing and benefit applications, activity analysis, consultation surveys, property maintenance
Central Government	National census forms, national audits, activity analysis
COMMERCIAL SECTOR	
Finance & Banking	Product application forms, customer data collection (CRM), account opening
Life & Pensions	Insurance claim forms, medical exam reports, risk assessment surveys, loss adjusting surveys
Manufacturing	Customer satisfaction surveys, QA forms, equipment maintenance, research & development, warranty repairs, health & safety forms
Market research	Postal surveys, data acquisition, field-based research
Retail & Distribution	Mail order, stock control, packing lists, drivers' logs, proof of delivery notes
Pharmaceutical	Clinical trials, drug order forms
Utilities	Record of work e.g. repairs, installations, inspections
CROSS SECTOR	
Finance Departments	Invoice processing, utility bills, purchase orders, credit application forms, direct debit mandates
Research Teams	New product development, customer satisfaction, data acquisition
Human Resources	Staff climate surveys, appraisal forms, training evaluation, employment contracts, discipline & grievances, dismissal
General Correspondence	Letters, reports, memos

## USING FUSION

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Using Fusion's library of design objects, it's easy to create a professional-looking form in no time.

Give your form a title, then drag and drop the objects you want into position on the form.

If the form you want to use is already in circulation, it's easy to recreate it in Fusion. Simply scan it in and copy the image of the form, as you design.

The same form design can be deployed to any device, located anywhere in the world.

You can print it onto paper, publish it on the web and deploy it to any number of tablet PCs or PDAs.

Once deployed, the blank forms are ready for completion.

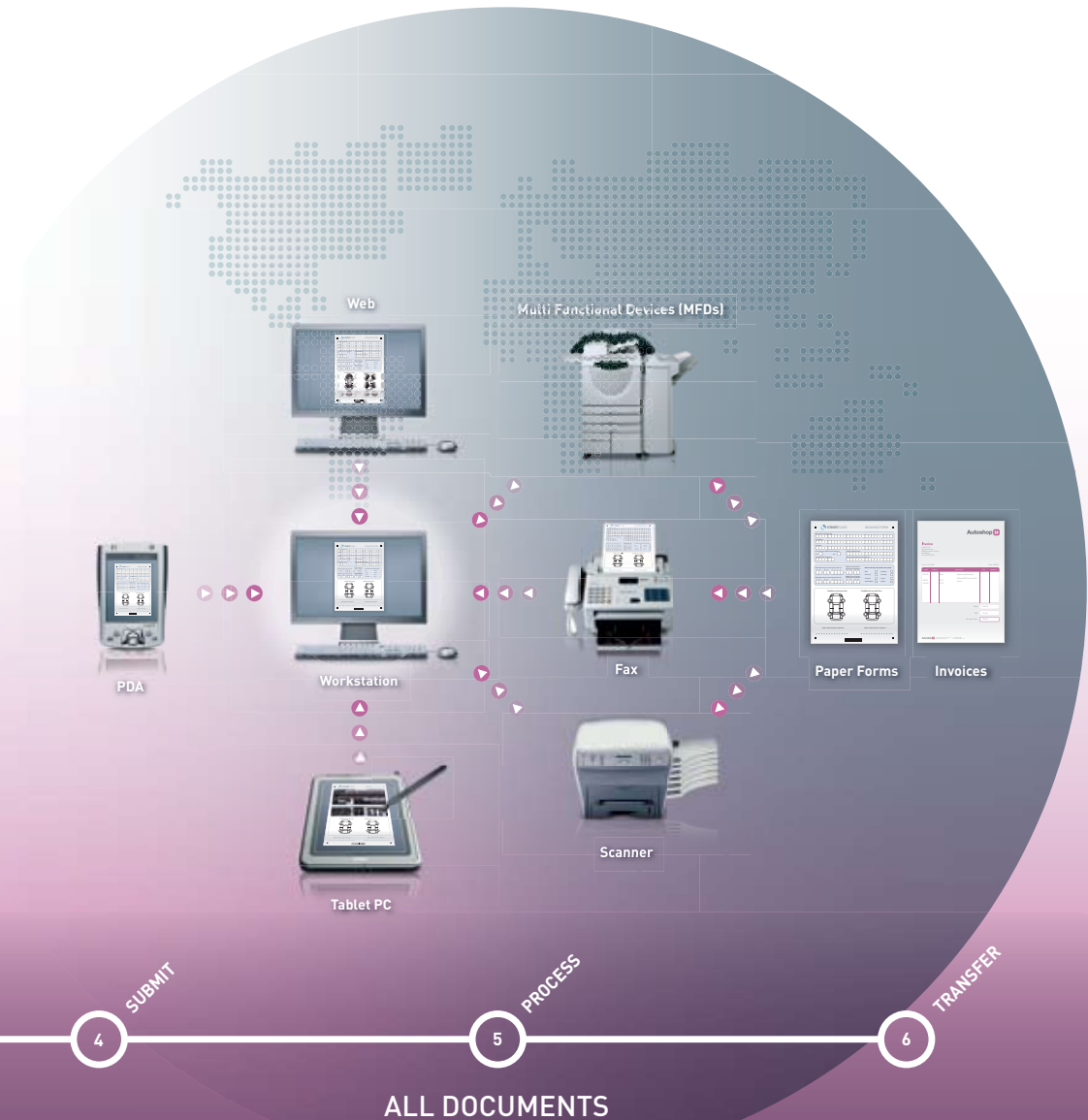
Tablet and PDA forms can be completed by using a real or simulated keyboard or with a stylus; the intelligent software will even read handwriting.

Electronic forms can be pre-populated with user data, for access at the front-line.

## HOW DOES FUSION AUTOMATICALLY PROCESS DOCUMENTS?

To give you a feel for the experience of using Fusion, let's consider a simple system with single workstation. Processing documents, such as invoices, begins at stage 4. But we'll start with structured forms where the first step is design.

“ The same form design can be deployed to any device, located anywhere in the world. ”



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Completed paper forms and documents e.g. invoices, are transmitted by fax or scanned and sent from multi-function devices, production or branch scanners.

Electronic forms are sent at the touch of a button – from tablet PCs, PDAs or over the web. Electronic data is fully validated at the point of submission so it is sent straight to the project database for transfer.

Images of the original documents and forms accompany the data in transmission.

The Fusion user interface shows the paper documents and forms being scanned in.

Using advanced intelligent recognition technologies, Fusion reads, extracts and processes the information they contain.

The software automatically recognises hand-printed and machine-printed characters, tables of information, barcodes, tickboxes – even company logos.

Paper documents and forms are automatically cleaned, monitored by a human operator.

The final dataset is presented in a recognisable, easy-to-read grid format for sanity-checking prior to transfer. You can filter and re-order the headings and create graphs or charts for simple analysis.

When ready, simply choose the preferred data format for export. Fusion connects with any application or database commonly available.

Alternatively, you can write bespoke routines and, using Fusion's API, exchange data with other business systems.

Job done!



## MAKING THE RIGHT CHOICE

“ Our straightforward approach gives you what you want; software solutions that are simple to implement, easy to customise and use and working productively in the shortest possible time. ”

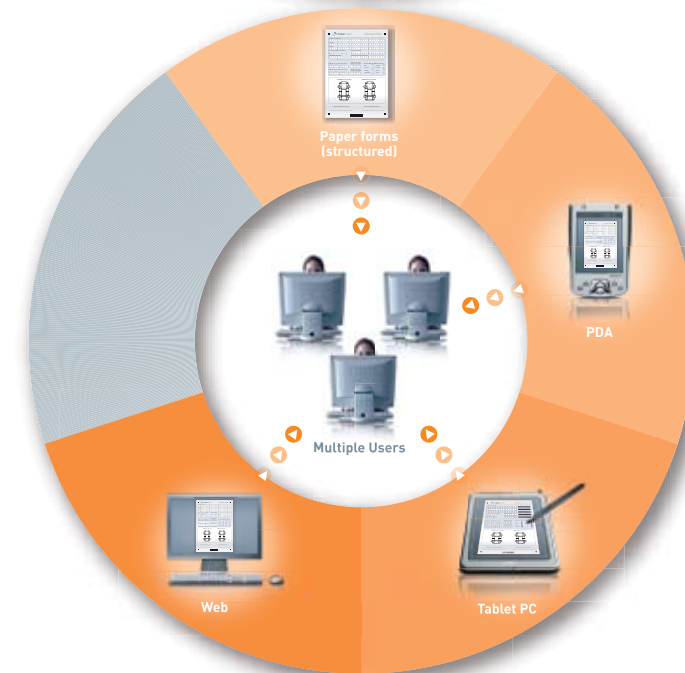
### WHAT DIFFERENTIATES FUSION?

Here's a quick summary of the benefits you can expect:

- ✓ Fusion's design tool makes the software extremely versatile, enabling you to set the software to capture information from virtually any form. Therefore, you're not reliant upon specialist programmers to develop bespoke solutions every time you want to put the software to a new use.
- ✓ All three Fusion systems share the same platform. This scalable architecture makes it easy to upgrade to a more functionally-rich system as your needs grow, while protecting your initial investment.
- ✓ Fusion's single information capture platform will process paper forms, electronic forms and paper documents simultaneously. You don't need to invest in separate systems for each document format you want to process.
- ✓ The software is highly interoperable and is therefore immediately ready to exchange data with other systems. This is made possible through the Application Programming Interface (API) or via bespoke connectors, for example, to SAP.
- ✓ The user interface is instantly familiar to Microsoft users and, with clear visual prompts, shows you exactly what you're supposed to do next.
- ✓ Our straightforward approach gives you what you want; software solutions that are simple to implement, easy to customise and use and working productively in the shortest possible time.



**Fusion<sup>plus</sup>** – this entry-level system will process paper forms, of your own design, from a single workstation. It is suitable for low volume form processing where the collected data is held locally and analysed or sanity-checked before being transferred to other applications. Typical users are those conducting surveys and audits.



**Fusion<sup>pro</sup>** – this mid-level system builds on the capabilities of Fusion<sup>plus</sup> with increased functionality and number of users while accommodating the need for high-volume form processing. Forms can be designed and processed at any number of locations across the enterprise and even deployed electronically - to the web, tablet PCs and PDAs for completion by mobile workers. The software will process complex, structured paper forms and, in some instances, semi-structured documents. Once processed, the captured information can be exchanged with other business systems via the Application Programming Interface (API).



**Fusion<sup>x</sup>** – Formic's flagship system, Fusion<sup>x</sup>, offers full intelligent document recognition (IDR) capability. In addition to the functionality provided by Fusion<sup>pro</sup>, it can read, extract and process information from semi-structured and unstructured paper documents, such as invoices, CVs, purchase orders, utility bills and reports.

Data can be extracted from inbound documents, not previously sighted by the software. This data can be exchanged with other data held in connected business applications to further enhance its value, allowing documents to be accurately classified and routed to those that need them.



## FUSION IN CLOSE UP

“ The software will even check that the extracted data conforms to the business rules you created...”

### WHAT'S INCLUDED AS STANDARD?

Fusion<sup>plus</sup>, Fusion<sup>pro</sup> and Fusion<sup>x</sup> are operated via three separate modules:

### WHICH LANGUAGES ARE SUPPORTED?

Fusion is capable of recognising the character sets of most languages worldwide.

### HOW MANY DIFFERENT TYPES OF DOCUMENT CAN FUSION PROCESS?

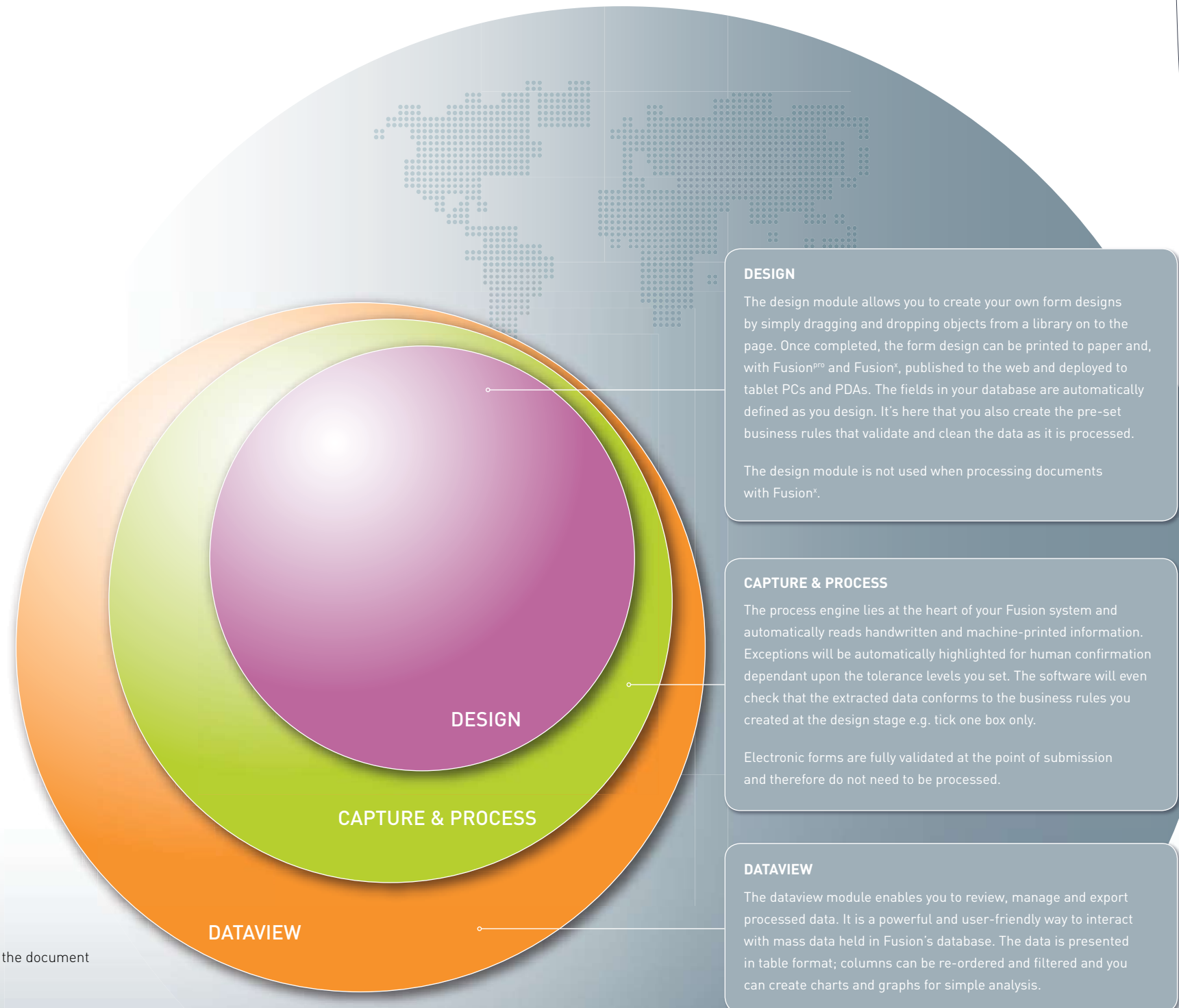
Ultimately, there's no limit, provided that you have the Fusion system capable of processing the document formats that you want (ref: table on previous page).

#### Paper and/or electronic forms

virtually any form can be designed or copied using Fusion's design module and can therefore be processed.

#### Paper documents

the Intelligent Document Recognition (IDR) capability of Fusion<sup>x</sup> will read and extract data from any document provided it's legible.



HARDWARE, SERVICES  
AND SUPPORT

WHAT HARDWARE DO I NEED?

The minimum recommended hardware specification that you need depends upon the document format(s) that you want to process:

DOCUMENT FORMAT	DATABASE / SERVER	WORKSTATIONS	RESPONDENTS
Paper forms and documents	<p><b>Fusion<sup>plus</sup></b> MSDE (Microsoft SQL Server Desktop Edition), supplied.</p> <p><b>Fusion<sup>pro</sup>, Fusion<sup>*</sup></b> Microsoft SQL Server 7.0/2000, not supplied.</p> <p><b>Minimum Specification</b> Two Dual-Core Intel Xeon processors at 2.8 GHz, 4 GB DDR2 SDRAM Memory, 150 GB 15,000 rpm SCSI hard disk, CD-ROM or DVD drive.</p>	<p><b>Prerequisite Software</b> Windows XP Professional (Service Pack 1 or 2), Windows 2000 (Service Pack 2), Windows Server 2003, Windows Server 2000, Windows NT 4 (Service Pack 6 or 6a).</p> <p><b>Minimum Specification</b> Intel Pentium III 500 MHz processor, 256 MB of RAM, 2 GB (Fusion<sup>plus</sup>) or 5 GB (Fusion<sup>pro</sup>, Fusion<sup>*</sup>) of available hard disk space, 800 x 600 screen resolution or higher, CD-ROM or DVD drive.</p> <p><b>Printers</b> Laser printers, digital photocopiers</p>	<p><b>Scanning Devices</b> Most scanning devices with TWAIN and ISIS drivers capable of producing group 4 TIFF images. These include production or branch scanners, multi-function printers (MFPs) and faxes. Please ask for a current list of compatible devices.</p>
Tablet PC Forms	Not applicable	Not applicable	<p><b>Prerequisite Software</b> Windows XP Tablet PC Edition.</p> <p><b>Minimum Specification</b> Intel Pentium IV 1.2 GHz processor, 512 MB of RAM, 2 GB of available hard disk space, 1024 x 768 screen resolution or higher, CD-ROM or DVD drive.</p>
PDA Forms	PDA server, supplied with the PDA software, must be separately installed.	Not applicable	<p><b>Prerequisite Software</b> Windows Mobile 2003 based Pocket PC, Windows Mobile 2003, Second Edition based Pocket PC, Windows Mobile 5.0 based Pocket PC.</p>
Web Forms	<p><b>Prerequisite Software</b> Web Forms uses IIS with asp.net and will install on:</p> <p>Windows XP Professional (Service Pack 1 or 2), Windows 2000 (Service Pack 2), Windows Server 2003, Windows Server 2000.</p> <p>Minimum Specification Intel Pentium IV 1.4 GHz processor, 1 GB of RAM, 2 GB of available hard disk space, CD-ROM or DVD drive.</p>	Not applicable	<p><b>Web Browser</b> All common browsers are supported.</p>

“ Subscription allows you to manage the financial impact ”  
associated with purchase and yet still take advantage  
of Formic’s products and services immediately.

WHO WILL INSTALL MY SYSTEM?

Formic’s Professional Services team, or that of your local partner, can install and configure your Fusion system to optimise its performance.

WHERE CAN I GET TRAINED?

One and two day foundation and bespoke training courses are delivered by Formic from our Head Office located a few miles outside London. Selected local partners deliver the same training in country. The courses give users the opportunity to gain valuable hands-on practice of the software in a coaching environment.

Users can top-up or refresh their classroom training by enrolling in Formic’s eLearning system where they are able to walk through common tasks online, assisted by animated screen simulations.

WHAT SUPPORT IS AVAILABLE?

Formic’s annual support agreement entitles subscribers to:

- ✓ Helpline for technical advice and user guidance
- ✓ Automatic software upgrades within the release
- ✓ eLearning modules to top-up and refresh classroom training
- ✓ Subscription to Formic’s eNewsletter
- ✓ Invitations to Formic customer events

DO I PAY FOR EACH SEAT INSTALLED?

Fusion workstation pricing is based upon the maximum number of concurrent users rather than the number of seats installed. This allows you to deploy the software more widely across the enterprise at no additional cost making it easier to assign available resource to Fusion-enabled machines.

WHAT ARE THE PAYMENT OPTIONS?

Option 1: Purchase

Purchasing the appropriate licences for your system entitles you to use the software in perpetuity.

Option 2: Subscription

Subscription allows you to manage the financial impact associated with purchase and yet still take advantage of Formic’s products and services immediately. It’s a pay-for-use solution that requires no upfront capital investment and is proving extremely popular for those with capital budget constraints.





## COMPLETE CONTROL

“ Fusion delivers immediate productivity and efficiency gains ”  
that payback your investment in a matter of months.

Fusion software is popular because it's easy to use and highly capable. It delivers immediate productivity and efficiency gains that payback your investment in a matter of months. And when your needs change, it's reassuring to know that adding new users or enhancing system functionality is straightforward.

### INTERESTED?

If you'd like to experience, first-hand, the capabilities of Fusion...

Call Formic today **+44 (0)870 197 5600**

or email [marketing@formic.co.uk](mailto:marketing@formic.co.uk)

If you'd prefer a web demonstration, please go to [www.formic.com/webdemo](http://www.formic.com/webdemo)





## SO, WHY CHOOSE FUSION SOFTWARE?

Fusion's value lies in the simplicity of its conception and purpose. It provides organisations with the core functionality they need and at a fraction of the price of more complex systems. The three Fusion platforms offer different levels of sophistication to meet the varying demands of users and because they are so easy to use, adoption is rapid and the benefits are felt across the enterprise.

Fusion is reshaping the way in which electronic and paper documents are being created, located and managed. Tackling the very first stage in the lifecycle of information, its capture, Fusion provides an on-ramp to enterprise content management (ECM), document management (DM) and workflow systems; feeding them with high quality, validated data and document images.

Formic's development philosophy is to give you the greatest possible payback on your investment in the shortest possible time. We do this by driving down the costs that arise from any subsequent customisation. Fusion software can be put to

work immediately and does not require lengthy engagements by specialist programmers to get it working the way you want and keep it working that way as your needs change. What's more, because all three Fusion systems are built on a common platform, it's easy to upgrade at any time and without the high costs associated with swapping out systems.

Formic's stated vision is to develop its software to process any document in any format from any source, so you benefit from all new advances in the technology the moment they become available.

**We know you have a choice. That's why we work so hard to repay the trust you place in us.**



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