V1
Document
Management

V1 Purchase Invoice Automation for Sage 200 with OCR Data Capture
Standard Solution Design

v1.0

8 January 2016

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Document Control

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1.0	8 January 2015	Richard King	Re-written for V1 Release 3.x
1.1	21 March 2015	Richard King	Minor revisions

Contents

1. Introduction

1.1 Purpose of the Document

The purpose of this document is to detail the V1 Purchase Invoice Automation (PIA) solution with Invoice OCR (DbCapture) for Sage 200.

The document describes the 'Standard' V1 solution for Sage 200. The purpose of the standard solution is to provide a comprehensive solution suitable for the majority of medium to large-sized Sage 200 users in a minimal timeframe. A greater degree of customisation is possible with a bespoke project, but that would entail additional scoping and specification and is beyond the scope of this document.

Site-specific configuration details will be captured in the Appendices to this document in order to provide a complete 'Handover' to the V1 Professional Services team for implementation.

1.2 Overview

This document is based on Release 3.6 of the V1 Document Management suite of applications and on Sage 200 2015 (v10.x). This solution is specifically for the standard 'On Premise' edition of Sage 200 rather than the Online Edition. The core of this solution is suitable for Sage 200 version 7.x and later. Customers should notify V1 or their V1 Business Partner before upgrading Sage 200 or enabling or disabling modules such as Purchase Order Processing or Project Accounting. Some aspects of the solution will need re-configuration for different scenarios and versions of Sage 200.

The details within the document set out the technical approach to providing a solution to capture and validate details from supplier invoices, to integrate with Sage 200, to reduce the amount of time required to check, match, approve, input, analyse, file and retrieve supplier invoices. It highlights key tasks that will be required to implement the solution and serves as a confirmation that the Customer's requirements have been understood.

In most respects, throughout the document, the term 'invoice' can be taken to mean 'invoice or credit note'. It should be noted of course that there will be some differences in how credits are processed from invoices.

2. Solution Description

2.1 Introduction

The focus of this document is the capture, processing and secure archiving of purchase invoices and credit notes. The V1 Purchase Invoice Automation (PIA) solution is based on the V1 Electronic Document Management (EDM) solution for Sage 200 which handles many other types of documents in addition to purchase invoices. The V1 EDM solution for Sage 200 is covered in more detail in a separate document.

This solution covers processes for dealing with three categories of invoice:

- **DIRECT** or **NONPOP** invoices, being invoices received from suppliers and processed for payment without an order having been raised in Sage 200
- **POP** invoices, being invoices relating to purchase orders entered in Sage 200
- **ARCHIVE** invoices, being invoices already entered in Sage 200, eg historical invoices, invoices entered manually or documents supporting transactions already in Sage 200.

The Customer will need to complete the Pre-implementation Checklist in Appendix 1 to identify the technical detail and Sage 200 companies that are in scope for the initial implementation of the V1 solution.

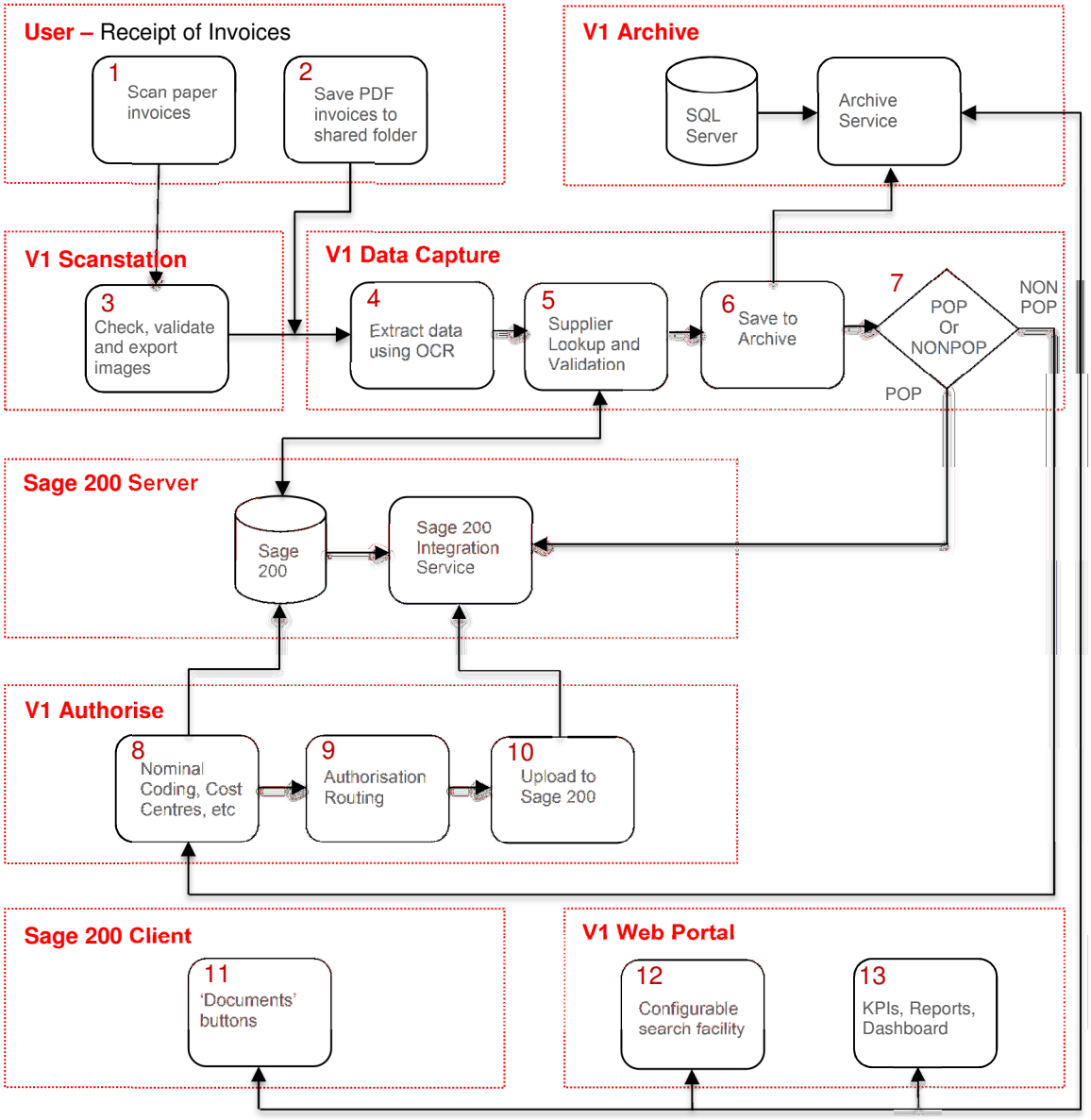
The features within the scope of this standard solution are:

- **Batch Scanning of Paper Invoices** using the V1 Scanstation software either with a dedicated scanner or images from a multi-function copier
- **Automated Import of PDF Invoices** from emails via shared folders
- **Invoice Data Capture using Optical Character Recognition (OCR)** with manual correction/completion where necessary
- **Matching of POP invoices** to receipts and/or order lines in Sage 200
- **Analysis of Non-PO invoices** by Nominal Code, Cost Centre and Department
- **Automated routing for invoices for on-line approval** using V1 Authorise
- **Remote updating of invoice approval status** via automated email messages
- **Automated reminder emails**
- *Project Accounting users only:* **Analysis of invoices by Project and Job Type**
- **Secure storage of invoices** and related documents in the V1 Archive (EDM Solution)
- **Viewing of archived invoices** and related documents from Sage 200
- **Searching and retrieval of invoices** and related documents outside of Sage 200 via the V1 web portal (V1 Web Retrieve)

Optional additional items:

- **Automated storage of Sage 200 Purchase Order documents** in the V1 Archive
- **Scanning and archiving of supplier delivery notes / GRNs**
- **Manual attachment of related documents** using the V1 Deposit client
- **Automated emailing and archiving of Remittance Advices** from Sage 200
- **KPI Reporting and Dashboard module**

2.2 Solution Overview



2.3 Purchase Invoice Automation - Step by Step

1. Invoices received on paper will be scanned on receipt. For optimum OCR results and most efficient storage, it is recommended that the scanning be done using a dedicated workgroup scanner attached to a PC running the V1 Scanstation with VRS technology.

   Batches containing multi-page invoices or invoices with supporting documents can be scanned with separator sheets to avoid manual collation of pages in the Scanstation software. Where the majority of invoices consist only of a single page, the user may prefer to separate single-page and multi-page invoices into separate batches for scanning to save time inserting separators.

2. Invoices received via email as PDF files can be dropped into a shared folder for automated processing. Where there are multiple companies and/or different processes to be used for different invoices, it may be advantageous to create a series of folders for the different companies and processes. *See Appendix 2*.

   If you have an email server that supports the POP3 protocol, PDF attachments can be automatically extracted from incoming emails and placed into the shared folder for automated processing. Suppliers should be given a dedicated email address to use just for PDF invoices. The mailbox polling software will automatically import all PDF attachments received in the nominated mailbox. Statements and copy invoices can be rejected during the data validation. The original emails will not be deleted.

   While the system only handles PDF invoice attachments, other formats such as Word .doc/.docx files and Excel files can be converted to PDF format using a printer driver. Care should be taken to use a consistent process for converting invoices so that the page size, etc does not vary from document to document. Ideally, you should ask your suppliers to supply invoices in PDF or TIFF formats as these are established standards for long-term document storage.

   Please note: The standard solution requires PDFs which contain only a single invoice. Each invoice may contain multiple pages and any number of invoices can be attached to a single email. PDFs should not require a password to view.

3. The V1 Scanstation software is designed to control a dedicated scanner with an Automatic Document Feeder (ADF) ensuring optimal image quality and allowing automated image clean-up, auto-rotation, de-skew, auto-crop, etc using the full capabilities of the scanner and 'Virtual Re-Scan' (VRS) technology.

   Images from networked scanners and multi-function copiers can be imported into the scanstation, but a reduced level of functionality will be available. This may mean images which take more space and less accurate OCR processing. Networked scanners and multi-function copiers will need to be configured to scan to a supported file format by the supplier or a trained administrator.

The Scanstation allows images to be reviewed for quality prior to submission to the Data Capture system. If batches containing multi-page invoices or invoices with supporting documents, such as timesheets, receipts, certificates, PODs or copy orders, have been scanned, the user will need to ensure the pages are correctly collated.

4. Once the scanned images have been checked, they will be uploaded to the Data Capture server along with any PDF invoices. From this point the process will be the same for both paper and PDF invoices.

   The Data Capture system uses Optical Character Recognition (OCR) to extract the data from the invoice. This means is works with almost all PDF invoices as well as scanned paper documents. The first time a new invoice layout is received a user will highlight with the mouse the data that should be extracted and the system will retain this as a 'template' in order to extract the data automatically in future. The system learns on-the-fly, so there is no need to create templates before starting to use the system. For invoices where references or totals are not always in the same place, the user can create an 'anchor' so that the location of the data is associated with key text on the document rather than fixed position. For example, the invoice total might be anchored to the words 'Total Payable' or the PO number might be anchored to the words 'Your Ref'.

5. The system can normally spot UK and EU VAT numbers without the need for a template, so if you have VAT numbers entered in Sage 200, the correct account can usually be identified automatically. For other invoices the system will learn to associate other text such as trading names, telephone numbers, postcodes, etc with particular accounts in Sage, so it's not essential to have VAT numbers in Sage or even to have the supplier name entered with the same spelling.

   The data extracted from the invoices is validated and checked against Sage 200. Supplier details, orders, receipts, currencies, exchange rates, VAT rates, nominal codes, project codes, etc are all taken from the live Sage database. Among many other checks, the system will check for duplicate invoices in both Sage and the V1 Archive. It will check that order lines have not already been invoiced (and optionally whether the goods have been received).

   Invoices for new suppliers and for goods not yet received can be placed 'on hold' pending the entry of supplier details or the receipting of the orders in Sage 200. If necessary, invoices can be rejected and deleted from the system at this stage. The reasons for invoices being held or deleted will be recorded. Optionally a PDF of the invoice can be emailed to the supplier with the reason for the rejection, eg 'No PO', 'Invalid Invoice', 'Wrong Company', etc.

6. Once the details of the invoice are 'accepted' by the operator, the invoice will be permanently archived and available to users across the network via the V1 web portal or from Sage. Invoices which are pending coding or approval can be accessed from the

Documents button on the Supplier screen even before the transaction has been posted into the Purchase Ledger.

7. Once the key details have been extracted from the invoice and validated, the process may differ for individual invoices.

   NONPOP invoices will be transferred to the V1 Authorise system for coding and approval. The invoices will not be posted in Sage until they have been coded, but they can be posted before they have been approved. A default approval 'route' will be allocated automatically at the data capture stage but this can be changed: here or later in V1 Authorise.

   POP invoices will normally be posted immediately in Sage 200 using the coding from the order, but they can be kept in query and sent for approval in V1 Authorise before being cleared for payment. If invoices exactly match the expected value and the goods have been received, the approval process can be bypassed completely. This may be restricted to lower value invoices or to regular, trusted suppliers.

   If Stock Control is in use or you have chosen to match invoice to receipts rather than just to orders, POP invoices can be placed on hold until the goods have been received in Sage. An email can be sent to the originator of the PO or to a generic Purchasing or Goods-In account with a copy of the invoice as a reminder to the user to receive the order in Sage.

8. Typically NONPOP invoices will be coded first and then sent 'electronically' for approval, but the approval can alternatively be done first. Approvers can optionally be allowed to code their invoices but more commonly the coding will be done in the accounts department either before or after the approval process.

   A single analysis line will be created automatically for each NONPOP invoice. If a default nominal code, cost centre and/or department have been entered against the supplier in Sage 200, these will be used rather than a generic default. The default line can be edited or completed or the invoice can be split across multiple codes, cost centres and departments if necessary. If Project Accounting is used, the invoice can be assigned to a Project and Job Type too.

   Once an invoice has been coded, it will be posted directly into the Sage 200 Purchase Ledger by the V1 Sage 200 Upload service. If the invoice has not yet been fully approved, the Query flag in Sage will be set to 'U' for unapproved. This flag will be removed automatically once the invoice is approved.

9. Within the V1 Authorise workflow system invoices follow user-definable 'routes'. Routes will often be based on cost centres or departments, but equally routes can be created for specific users or groups of users, such as Directors, or even for types of invoice, such as Utility Bills, or specific suppliers. *See Appendix 5*. Once an invoice enters the system, it is assigned a user or group of users based on the route. Each user can Accept, Query or Reject an invoice. If they query an invoice, they must enter a reason;

the invoice stays on their worklist, but the reason is visible to senior staff and the accounts department. If an invoice is rejected, it will typically go back to the accounts department for re-assignment or rejection back to the supplier. What happens when an invoice is accepted will depend on the rules defined on the route. These rules may depend on the invoice data - particularly the value of the invoice. A low value invoice may only need to be approved by one person, whereas a very large invoice may need to be accepted by two directors.

Users can be notified about invoices that they need to deal with by email. Users who are not office-based can elect to approve invoices by email message. This means they can deal with invoices from any device that can access email including phones, tablets and home computers – without the need for client software or an app. Each invoice is send by email as a PDF attachment and the user can approve, query or reject the invoice simply by responding to the email. Even if users choose not to approve by email and not to have email alerts, they will still receive reminders if they fail to action invoices promptly. Note, however, that nominal ledger coding is not currently available when approving via email.

10. Once the invoice is fully authorised, if it has not already been posted, the invoice will be posted. If it has been posted already but with the query flag set, the flag will be automatically removed so that it can be paid.

    The upload process makes use of the Sage 200 API to post invoices. There is no need to import transactions or to use a separate data exchange module. The transactions appear in Sage within seconds of being approved. If approvers are allowed to code invoices themselves, you can optionally have a final check of the coding in the accounts department before the invoices are posted. The V1 Upload service obeys Sage 200's own settings for which periods are open for posting.

    At month end, if there are still significant numbers of invoices which have not yet been coded and approved, the data from the Authorise module can be exported to Excel and used as the basis for accruals.

11. Once transactions are posted, they are allocated a unique reference by Sage 200 known as a URN. These references are automatically retrieved from Sage and added to the invoice metadata in the document archive, this allows the Documents button on the transactions screens in Sage to be enabled so that users can drill-down to the invoice itself without leaving Sage.

    A Documents button is available within the Nominal Ledger transaction screen as well as the Purchase Ledger, so whenever you drill-down to transaction level, you can see the related invoices within Sage 200. If you are using Sage's Project Accounting the V1 Upload will update analysis and reporting there too and make the invoices available from the Project Accounting Costing screens.

The drill-down also offers links to related documents. So if you are using the V1 EDM solution to store supplier quotations, contracts, purchase orders, confirmations, GRNs, statements and remittances advices, all of the these documents can be accessed from Sage by following the links from the invoice.

12. Outside of Sage 200 it is possible to search for invoices in the V1 Web Portal. The Web Retrieve screen allows users to search for invoices using any of the stored metadata including supplier name, code, invoice and order numbers, narrative, second reference, document date, scanned date, user and status.

13. The KPI Reporting and Dashboard module is an optional extra which provides a more graphical view of invoices in the workflow process, as well as analysis of the invoices processed and the effectiveness of the invoice capture and approval processes themselves. The Dashboard also provides drill-downs to the actual documents and to a more detailed audit trail from the PIA solution.

3. Pre-requisites

3.1 Technical Pre-requisites

General

The standard solution is normally deployed as an 'on premise' solution to the Customer's server which may be physical or virtual.

Local Area Network (LAN) connections should be 100MB minimum, ideally with 1GB LAN connection between high volume scan stations and the V1 server.

User details can be imported from Microsoft Active Directory in order to enable Windows user authentication.

The V1 solution will require access to an SMTP email server for sending internal and external emails. To import PDF emails directly from mailboxes and to support approval via email, POP3 will need to be enabled on the email server. Note: that the email server used does not necessarily need to be the customer's main email server. Additional software may be required to access email servers hosted by third parties.

A dedicated PC running Microsoft Windows with a workgroup scanner is recommended for batch scanning paper invoices. Kodak scanners are preferred and Kofax VRS Elite is recommended to get the most from the scanner.

Workstation - Specification

Users validating or coding invoices will need a Windows desktop in order to run Windows client applications. Windows Terminal Services, Citrix and XenApp may be used as an alternative to installing client software on local desktops. Where invoices are checked, validated or coding over a Wide Area Network (WAN), a thin client environment should always be used.

Other Sage 200 users need only Internet Explorer and Adobe Reader to access documents. While older versions of Windows may still work we would recommend using Windows 7 or later with IE9 or later.

Windows versions supported for V1 client applications are:

- Windows 7 (32 & 64 bit)
- Windows 8.x
- Windows 10

Note: The Microsoft .NET Framework 3.5.1 is required for all V1 applications.

Windows PCs should have at least 2GB RAM, a 1 GHz processor and 200MB of free disk space. 4GB RAM and a 3 GHz processor would be preferable. PCs used for scanning with fast scanners may need more memory. Refer to the scanner manufacturer's documentation.

Users approving invoices via email can use any platform that can receive and reply to emails, including Smartphones, Tablets and Macs as well as Windows PCs. They will need a suitable viewer to access PDF documents.

Application Server - Specification

For smaller sites, eg with fewer than 10 users and 10,000 invoices per year, the V1 PIA solution can be installed on the same server as Sage 200 - particularly where SQL Server is not on the same server. However, for future flexibility and scalability, it is recommended to implement the PIA solution on a dedicated server – particular in a virtual server environment.

Windows versions supported for V1 server processes are:

- Windows Server 2008 R2
- Windows Server 2012
- Windows Server 2012 R2

Note: The Microsoft .NET Framework 3.5.1 is required for all V1 applications. The Microsoft .NET Framework 4.0 is required for the KPI Reporting and Dashboard module.

The following server configuration is suitable for a dedicated V1 server supporting up to 30 users processing fewer than 20,000 invoices a year:

- Dual CPU
- 8GB RAM
- 5GB disk for software installation and configuration

The following server configuration is suitable for a dedicated V1 server supporting up to up to 100 users processing up to 200,000 invoices a year:

- Quad CPU
- 24GB RAM
- 5GB disk for software installation and configuration

For larger user populations or document volumes or where the V1 archive is also used for high volumes of sales documents, please discuss server requirements with V1 or your V1 reseller.

Database Server - Specification

The V1 PIA solution will typically use the same database server as Sage 200. Please note that the documents themselves are stored in the database, so storage requirements on the database server should reflect the expected document volume. For up to 10,000 invoices a year allow at least 20GB of storage. Where other documents are also archived, allow additional storage.

Database versions supported are:

- SQL Server 2008

- SQL Server 2012
- SQL Server 2014

Note that SQL Server ‘Express’ Editions are only suitable for the smallest implementations. SQL Server Standard Edition or Enterprise Edition should be used on all live environments.

3.2 Software Requirements

V1 Software Requirements

This solution is based on release 3.6 of the V1 Document Management suite - some functionality will not be available with earlier releases.

The following V1 modules are required for the standard functionality described here:
V1 Scanstation (DbScanner)
V1 Archive (DbArchive Server)
V1 Capture (DbCapture Server and Clients)
V1 Authorise (DbAuthorise Server and Client)
V1 WebRetrieve (DbWebRetrieve) – customisable document search and retrieval
V1 Mail (DbMail)

The following V1 modules are optional:
V1 Deposit (DbDeposit Client) – for storing emails and related documents with invoices
V1 Output Management (Printer Driver) – for storing POs and other outbound documents
V1 Output Manager for Sage 200 – alternative printer driver for use with DbForm
V1 BACS (DbBACS-iP) – for electronic funds transfer via BACS
V1 Secure Cheque Printing (DbChequePrint) – for secure rather than pre-printed cheques

The V1 PIA solution requires Microsoft SQL Server databases (SQL Server 2008 or later, Standard Edition or above). If using the same SQL Server as Sage 200, the V1 solution will normally consume 1 CAL. Other licencing scenarios are possible, please refer to your Sage Business Partner. V1 does not provide additional Microsoft SQL Server licences or CALs with the PIA solution.

Sage Software Requirements

The solution is designed for Sage 200 2010 (v7.x) through to Sage 200 2015 (v10.x). New releases by Sage will need to be tested by V1. Please refer to V1 or to your V1 Reseller before applying any updates to your Sage 200 system. This solution is specifically for the standard ‘On Premise’ edition of Sage 200 rather than the Online Edition.

The standard solution for Sage 200 assumes a single Sage system. There may of course be multiple companies/databases. If there are multiple Sage servers, eg because different versions of Sage 200 are in use or being tested, additional time will be required on the implementation project. If necessary, the V1 solution can support up to four separate Sage environments, known as LIVE, TEST, DEV and TRAIN.

While there will normally only be a single Sage environment, known as ‘LIVE’, there should always be a ‘test’ company/database. The test company will be required for testing and training purposes. This should use a copy of the ‘live’ company rather than the standard Sage demo data. This makes it easier to test the system with real invoices and to use the V1

'knowledgebase' of your suppliers' invoices built-up during testing with the live company from go live.

If the companies that will use the V1 PIA solution have significantly different configurations or requirements, eg some are VAT-registered others not; or some use Project Accounting and others don't; or some receipt purchase orders and others don't, a test database should be created for each of the companies or configurations.

The V1 PIA solution also supports multiple 'profiles' for situations where a single V1 system is shared between companies with very different requirements, eg where some companies have bespoke requirements or use different accounting systems. If different companies within a group share the same suppliers, but have different account codes for them, it may be necessary to use separate profiles in that situation too.

The V1 PIA solution will consume 1 Sage 200 user. This can be a 'remote user' rather than a full user.

Scanner – Specification

V1 recommends dedicated scanners from Kodak.

For **low** volumes, **good** quality, **A4** documents: **Kodak i2000** range
For **medium** volumes, **mixed** quality, **mixed** sizes up to A3: **Kodak i3000** range
For **high** volumes: **Kodak i4000** or **Kodak i5000** ranges

Please note that the i2000 range can only accept a small number of pages at a time. The i3000 range is more robust for scanning mixed batches even when all documents are A4 or smaller.

Models from other manufacturers can be used provided they have TWAIN drivers and support scanning to TIFF or JPEG (not PDF only). We recommend using VRS, so also check for VRS certification if possible. The following models are known to be suitable, but please note that V1 Helpdesk cannot take questions on scanners other than the recommended Kodak models unless supplied by V1:

Fujitsu – model numbers starting with "fi-"
Canon – model numbers starting with "DR-"

V1 recommends the use of 'Virtual Re-Scan' or VRS on each scanstation. This is an extra software component that optimises the performance of the scanner. VRS is normally supplied with the scanner – sometimes bundled, but typically as a chargeable extra. Please confirm with your scanner supplier whether this is included. VRS is particularly beneficial when scanning difficult, coloured documents and documents with barcodes. It should be installed on each scanstation even when using networked scanners.

Multi-function copiers are not recommended for use with the Purchase Invoice Automation (OCR) solution, but they can be used as a backup. Please note that OCR results will typically be less accurate and file sizes larger when using a multi-function copier. The copier should be configured to use the following format:

Resolution	Colour	Format	Compression Type
300 dpi	Bi- tonal (black and white, not greyscale)	TIFF	CCITT Group IV

3.3 Sage 200 Configuration

The V1 PIA solution will read many configuration items from Sage 200 itself. In particular, to match invoices to receipts and orders, Sage 200 should be set to match to receipts and orders. However, authorisation does not need to be enabled within Sage 200 in order for V1 to manage the authorisation of invoices. V1 will also obey the rules configured in Sage 200 with regard to which periods are Open for postings.

To get the best from the V1 PIA solution, there are certain points of configuration that can be made within Sage 200.

1. Enter VAT registration numbers when setting up suppliers

   This is not absolutely essential, but it is very helpful in speeding up the learning process. It also helps to identify duplicate suppliers in Sage.

2. Enter an email address for each supplier

   This can help with issuing purchase orders quickly and cost effectively; increasing the chances of the supplier quoting the correct reference; and in turn reducing errors on orders. Email addresses in Sage can also be used to automate the return of rejected, invalid or queried invoices to the supplier.

3. Enter default nominal codes, cost centres and departments against suppliers

   Entering defaults when setting up suppliers will save time when coding NONPOP invoices. The defaults can be changed for any invoice when necessary.

4. Enter a default VAT rate against each supplier

   Entering the normal VAT rate against each supplier helps the V1 solution to highlight possible errors. There can be many reasons why the total VAT on any invoice does not match the default rate, but V1 can highlight invoices where the amount is significantly different to the normal. This can highlight mistakes by suppliers. It can also serve as a prompt to adjust for restricted VAT such as on car leases.

5. Enter an email address for each Sage 200 user

   Entering email addresses for users allows the PIA solution to send email alerts to the relevant users. For example when an invoice arrives but the goods have not been receipted, an email can be sent to the originator of the order reminding them to receive the goods in Sage 200. This can be more effective than raising an exception and sending the invoice out for approval. If the user reacts promptly, the invoice can be checked again 24 hours later and may match perfectly.

6. Consider using Analysis Codes in the Purchase Ledger to help automating Invoice Processing

   If you issue purchase orders to majority of suppliers, consider using an Analysis Code to identify those suppliers from whom you will accept invoices without an order. This allows the system to automatically select the correct process for all invoices. It is particularly beneficial when invoices are processed directly from incoming emails.

Equally an Analysis Code can be used to identify the appropriate approval route for a supplier.

4. Appendices

4.1 Appendix 1 – Pre-installation Checklists

4.2 Appendix 2 – PDF Invoice import structure

4.3 Appendix 3 – Matching invoices to POs and Receipts

4.4 Appendix 4 – Hold and Rejection Reasons and Actions

4.5 Appendix 5 – Routes for Coding and Approval

4.6 Appendix 6 – Automated emails and reminders

4.7 Appendix 7 – Approval via email