



How to Get the Most Out of Your Data Capture System

by Andy Eberhard

When you think about a data capture system, what goes through your mind? Maybe you think about the reduction in paper you will realize, easier access to content, or more space due to fewer filing cabinets. While these may be worthy thoughts, a feature rich and correctly utilized data capture system can be so much more.

Capture More Than Paper

When most people think of data capture they immediately think of capturing paper documents. While capturing paper document and the goodness that comes with that (fewer filing cabinets, less clutter, a 'green' initiative), more and more capturing documents other than paper is just as important. For instance, capturing emails, which have proliferated in recent years, has become a segment of the enterprise content management (ECM) onto itself. Articles and best practices on email management abound. And a data capture system that allows for the capture of emails is an important part of that email management movement. Utilized correctly, a good data capture system will allow for email inboxes to be monitored, emails and their attachments captured, attachments and their associated pages, extracted, and notifications configured throughout the whole email process. Although fewer in number than in the past, a data capture system should also have the ability to capture incoming faxes. By capturing fax documents directly from one or more fax servers, you should no longer have to scan paper fax printouts unless you really just enjoy doing that. Finally, the capture of electronic files should be realized as well. A well designed data capture system will allow you to capture all types of images, indexed documents, and other files (such as Word documents, Excel spreadsheets, etc.) from a file system. So besides capturing paper, get the most out of your data capture system by capturing the rest of the document world that resides in emails, faxes, and electronic files.

Realize Efficiencies Through Using Data Capture Workflows

Workflow is normally a word that the ECM community associates with content management systems. But capturing information is more than just running a scanner and electronically filing data. By using workflows in your data capture system administrators can monitor each user and each item of work. This means that bottlenecks and poor performing resources can be identified and processes can be improved through changes and/or training. Through the reduction or elimination of bottlenecks or poor performing resources in your data capture system, efficiencies can be gained and costs reduced. A few data capture tools to be aware of which are important to a good data capture workflow process, besides the integrated workflow engine itself, include a graphical drag-and-drop process designer, rule-based routing, rule-based exception handling, dynamic queue management, and server and user activity logging to name a few.

Reduce Shipping and Handling Costs

With a distributed data capture system, gone are the days of having to send paper documents from a remote office or location to a centralized office to be sorted, prepped, processed, and filed. Getting the most out of your data capture system means lowering the cost of doing business and allowing the capture of data and capture related tasks to happen anywhere and at anytime. For instance, capturing customer billing information at one or more remote locations using a distributed capture system is faster, less expensive and more secure than shipping the paperwork to a central processing center. Buying and setting up a data capture system that will allow you to scan, index, quality control, and verify is key to being able to allow business processes to happen wherever your qualified people are located and where it most makes sense from a business perspective, whether that processing is handled remotely or centrally.

Eliminate Manual Steps Whenever Possible

By eliminating manual steps in any process you are effectively increasing efficiencies and reducing costs. Through the use of document automation, a data capture system should allow you to eliminate manual steps such as paper preparations, document assembling, and document indexing as much as possible. Automation features such as automatic separation, image clean-up, database lookup and validation, and data recognition and extraction (such as optical character recognition (OCR) and intelligent character recognition (ICR) are all important to set up and use to get the most out of your data capture system. Setting up your data capture system to simply scan and file documents into an electronic folder may be quick and easy but the real bang for your buck from a data capture system comes from setting up and using document automation features.