

## White Paper for DataFlow



**“DataFlow provides a solution to many data capture and data processing problems.”**

## A solution to data capture and data processing problems

### Introduction

Organisations and businesses are relying more and more on customer information to drive their business process. Getting this information to the right people at the right time is imperative to the success of the business operation. Ridge Technology are presenting businesses and organisations the opportunity to streamline and improve their process of getting critical information to the right people, faster, by leveraging their DataFlow product set with some existing technologies.

Organisations spend a significant amount of time performing the data capture process that involves the transfer of customer data into back end systems such as databases and work flow systems. Most organisations use paper based systems with some implementing scanning solutions – both paper-based and scanning systems still require a high level of manual intervention to prepare and capture the data from the forms. Ridge Technology's DataFlow product set removes this manual preparation and data capture by

automating the processing of data from forms to the correct systems.

The capture of data from paper forms requires a lot of manual effort e.g. sorting, viewing, scanning, reading, typing, validation etc. and due to human error this data is rarely processed as quickly and accurately as is required by the internal business process. Another issue encountered with using paper based forms is the cost of change to the actual forms e.g. application forms. The cost is high as replacement forms may have to be printed, rolled out and distributed. Changes to forms can then be a cumbersome, time consuming and costly exercise.

Online form submission which is mostly HTML pages has its own problems where simple changes like adding or deleting an information field can involve a lot of programmatic work that needs to be carried out by an IT operative.

Customer to business and business to business organisations generally use forms for collecting data and the more forms in use the more complex the data processing operation is.

eForms (electronic forms) provide a breakthrough in automating both offline and on-line data capture. Ridge Technology Solutions have harnessed the power and potential that eForms offer and enhanced it by developing their DataFlow product range to address a number of the specific data capture and processing problems that businesses face each day e.g. DataFlow will increase the speed, accuracy and efficiency of processing data.

This paper discusses the issues surrounding data capture and data processing and outlines the benefits of eforms and value of eforms and DATAFLOW Ridge Technology's data capture solution.

## **Data Capture**

### ***What is Data Capture?***

Customer information is the lifeblood of businesses and is necessary for businesses to both consolidate and grow. Data capture is the process of transferring customer data from paper or electronic forms to computer systems where the data is then made available to the appropriate business users and decision makers.

The data is required to be delivered as quickly, accurately and efficiently as possible to enable the key business decisions to be made using the correct information.

Organisations currently depend on a number of different processes between the customer and the decision maker - from postal services (internal/external), data capture teams etc. Along with the potential risks and delays with third

parties, the data capture process has a number of other problems.

### ***Problems associated with data capture***

#### **Effort and cost**

- Data capture is a labour intensive process often requiring considerable manual effort to process each form.
- There is considerable effort required for storing and filing of the paper forms after the capture process
- Cost of document storage space

#### **Efficiency**

- The process relies on a number of different 3<sup>rd</sup> parties to function e.g. postal services, internal mailing service etc.
- High volumes of transactions often overloads the data capture process
- Data often reaches key decision maker too late
- Data capture is often performed in disparate locations and inefficient practises developed across locations.

#### **Accuracy**

- Hand writing on forms is often unclear and then misrepresented on systems after the capture process leading to incorrect searches, comparisons etc.
- With no validation when the customer is completing the form, they may enter incorrect information e.g. for DOB they may incorrectly enter 30/2/1980 and the user then needs to work out if this was a different date or month.

## Cost of change

- Cost of changing a paper based form can be high as the form has to be printed and rolled out e.g. a change of company director could necessitate a change to the footer of all forms.
- Online forms can require considerable effort from the IT department to change.

## Dependency on IT

- Dependency on IT department to make form changes
- Business change may not be prioritised in terms of the IT change priorities.

## Staffing

- High turnover in data capture staff
- Often lack of motivation of staff due to repetitive nature of the job

These are the different problems and challenges that the data capture process faces, but there are solutions available that will address each of these problems. These solutions have been made possible by the evolution and availability of eforms.

## eforms

"As much as 85 percent of business processes depend on forms, and electronic counterparts (eforms) can yield significant cost savings over paper in design, development, production, inventory, delivery data quality, and integration, as well as reduce the time and effort associated with paper-intensive processes." *eforms Ripe for*

*Greater Adoption, Fueling Overall Content Management Growth, Gartner, May 2006*

eforms (electronic forms) are forms that can be completed electronically and submitted online or sent via email. The details entered by the customer are captured on the form and sent automatically with the form to the appropriate destination once the submitter selects to send.

## Evolution of eforms

First Stage: Print-and-fill forms that businesses distributed to users and customers enabling them to firstly print and then fill in the form which was then returned by post or fax. The initial benefit of print-and-fill forms was removing the cost of printing and posting large quantities of standard forms.

Second Stage: Fill-and-print which enabled the users and customers to complete a template form they received electronically (email or online) and to then print the form after they had completed it. This extended the benefits of print-and-fill by improving the quality of the data received and allowing it to be processed easier by scanning solutions (i.e. OCR, Optical Character Recognition).

Third Stage: Advent of the Electronic form (eForm). Electronic forms use software to capture data exactly the way the customer enters it, ensuring its accuracy. eforms extended the benefits of the earlier electronic document by now allowing the form itself to validate the data as the customer entered it. As eforms integrate easily with browser

processing systems, the potential uses for eforms increases dramatically.

### ***Benefits of eforms***

- Forms can be completed when the user is online or offline where they can save a copy locally and fill at a time of their convenience
- The form itself can validate data that the customer enters ensuring better quality data
- The technology eforms uses is familiar e.g. email, PDF and web technologies.
- No need for clients to install software to use as Adobe Acrobat Reader is available on 97% of PC's worldwide
- Forms can be created, changed and distributed a lot quicker
- No 'lost' forms like paper versions
- Secure mode of data transfer

Ridge Technology have leveraged the power, potential and benefits of eforms and created DataFlow, a product designed to overcome the challenges that businesses experience with their data capture process.

### **Introducing DATAFLOW**

#### **Benefits of DATAFLOW for data capture process:**

- Reduced time, effort and cost
- Handle higher volumes of data
- Less dependent on 3<sup>rd</sup> parties
- Increased Efficiency
- More accurate data
- Reduced cost of change
- Data integrity
- Reduced dependency on IT
- Reduction in staffing
- Reduced filing and paper storage
- Higher conversion rates
- Standard approach
- Supports multiple brands
- Quick ROI

### ***Ridge Technology's DataFlow and what it can do for you!***

DataFlow in conjunction with the use of eforms presents a number of benefits to business data capture process that will in turn provide a benefit to the success of the business. These benefits include:

- Reduction in the time it takes to get the information to the key decision maker
- Ability to handle increased volumes with no changes or extra effort required Reduction in dependencies on third parties
- Reduction in the effort required for data capture
- Reduction in the cost of the data capture process
- Increased efficiencies
- Increased data integrity and accuracy as data can be validate as the user completes the form
- Reduction in the cost of change – changes to forms and distribution no longer involves costly print runs, changed forms can be made available quicker
- Reduction in the dependency on IT departments' priorities as business users can now create their own data processing rules
- Reduced filing and storage costs as forms and data are electronically received and processed removing the need for paper forms
- Increased time and accuracy means higher conversion rates for business applications
- Standardised organisation data capture approach by providing a single process that can be used by all company forms

- Support multiple brands – organisations are more and more offering their products and services under different brands but with all the same processing rules
- Quick ROI - DataFlow implementation can show a quick ROI by delivering significant cost per transaction reductions for data capture of forms

### ***How DataFlow Works***

A form is created in PDF using standard eForms technology; this is then configured within DataFlow to specify the processing rules for the data when a form is received. The form can then be distributed to users/customers for completion.

Once submitted back to the company (email or online submission), the data is immediately processed by Dataflow according to the rules specified during the form set-up.

Business users can make changes to these forms and processing rules with reduced IT involvement saving valuable time and resources. This system will be 'always on' to process data immediately it is received and not subject to the normal delays relating to mail delivery, work schedules and additional workloads.

DataFlow allows you to efficiently improve and control your data capture process.

### ***Where to use DataFlow***

DataFlow can enhance any process where data is captured on forms, especially useful where the data needs

to be gathered, organised and stored quickly. Some examples of the sort of use may be:

- Gathering customer information e.g. application forms of any kind
- Collection and immediate availability of market research data
- Sales campaigns – get the data quickly into a meaningful structure
- Government forms e.g. tax, information requests etc.
- Requests for quotes, proposals
- Use as online forms
- Use where forms change on a regular basis

### ***Conclusion***

Ridge Technology's eforms data capture and processing product provides a number of benefits to the capture and processing of vital business data. The data is processed quicker, more accurately, and is available earlier for key business decisions while at the same time reducing operational costs.

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Diagram providing a comparison of Traditional Data Capture Process and eforms/Ridge Technology's Capture and Process

