



Choosing the Right Capture Methodology

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Introduction

The ability to capture business content and make its information available is an essential element of any enterprise. In many ways, capture is the fulcrum to certain technologies and strategic paradigms providing the foundation to business organizations. Therefore, it is vital that the way organizations approach capture enhances business processes, rather than obstructs or impedes their function.



Capture to Archive

A great deal of organizations sequence from capture to archive, and this has been the standard setup for quite some time. Capture to archive, or backend capture, begins with inbound paper documents or other hard content assets. These materials are manually sorted and hand delivered to respective people and departments in the enterprise. After review, approval, and manual data entry to complete processes reliant on the content, the content is captured via scanning. The digitized files or records are then stored in their appropriate folders, software applications, or repositories. A link is usually created between application and record to aid in retrieval. The capture to archive methodology when consistently adhered to promotes searchability, security, and transportability of business content, but it is labor intensive, and so its primary pain point is a heavy human resource demand. Moreover, paper as a storage medium is more difficult to access, as well as more vulnerable to loss than digital, and therefore data kept as paper for extended periods of time increases the risk surface for potential disasters, and can hinder timely access to data.

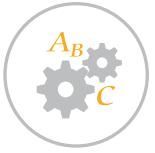


Capture to Process

A smaller percentage of organizations have organized their capture systems in an entirely antagonistic way to capture to archive. Where capture to archive positions capture as only a tool for storage, capture to process integrates capture as a component to the process itself. This style of capture is front-loaded, so capture occurs at the beginning and bridges digital content with applications and reliant business processes from the outset.

Paper documents enter the organization and are immediately scanned/captured, categorized, sent to respective software applications or departments, and stored in the appropriate location or repository. This approach is also used to trigger workflows and automated business processes. As such, claims, applications, and other content intense processes become more streamlined and efficient. When coupled with BPM and a rules engine, the decision process itself can become more automated leaving only exceptions to be handled by humans.

This greatly lessens the human resource load and amount of manual tasks necessary for backend capture, therefore increasing efficiency. But now which methodology is best? What sequence is most effective for the enterprise? Truly, what is the way forward, backend or front-loaded capture?



Supporting Technology

Several technologies have synergy with the capture to process model. For example, recognition technologies like optical character recognition (OCR), classification tools, and extraction methods heighten the ability to capture at the beginning of a documents digital lifecycle through automation. Content can be classified (i.e. what kind of content is this) or extracted (i.e. specific data within the content) and routed to the appropriate departments or people from the beginning.

In this way, inbound content has a lot of kinetic energy, and moves quickly and seamlessly through capture to process and finally to archive. Paired with automation technology, the capture to process methodology becomes a very powerful technique in the enterprise, increasing efficiency and lowering both monetary and labor costs.

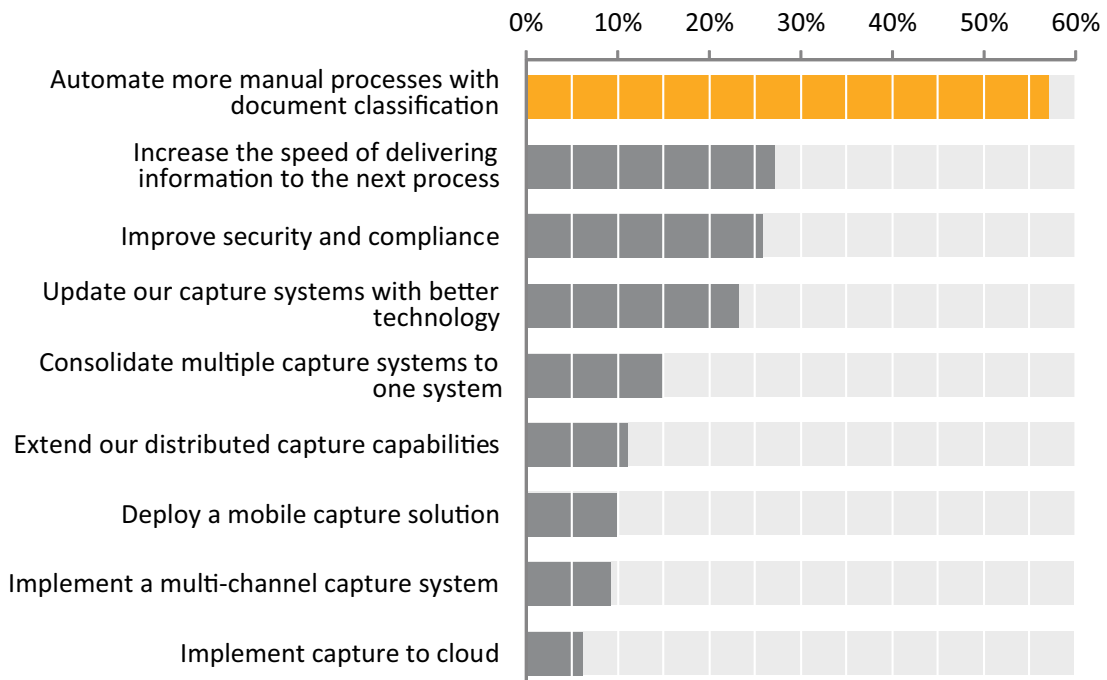


Process takes Precedence

As work culture shifts to a more process heavy paradigm, rather than one centered on technology, capture to process is gaining traction in the enterprise. Although capture to archive is better than no capture at all, capture to process is in all ways a more effective, efficient, and a complementary arrangement with current ECM technologies, digital workflows, and best practices in content management.

A recent AIIM survey shows that when asked what their immediate priorities were to improve their existing capture systems, 58% of respondents said it was to automate more manual processes, and the second most aggregate response was to increase the speed of delivering information to the next process. (Figure 1) Process is the engine that drives our business, and without content to fuel it, process serves no purpose. Front-loaded capture ensures our content is linked directly with our processes immediately, so both can be as useful to the enterprise as possible.

Figure 1. What are your immediate priorities to improve your current capture system(s)?¹





Conclusion

As modern capture solutions evolve, we must make progressively more sophisticated decisions to harness these tools to their greatest potential. One of these decisions is choosing which sequence and methodology is the best fit for the enterprise. Scanning documents at the front end of the process is the preferred composition and method for enterprise capture. Front-loaded capture, when supported by recognition, classification, extraction, and triggering mechanisms, has the potential to offer a large and expeditious ROI. Although the majority of our organizations rely on a capture to archive model, we should revise these configurations, and in an about-face, put effort into capturing inbound content at the earliest touch-point possible.

Changing the methodology in your organization, and transitioning to capture to process at the front end can be accomplished as a continual practice. The key is planning and how you approach it. These four elements are things to consider when evaluating how capture to process can benefit your organization:

- Match the access, process, security and compliance needs of your organization to your capture process.
- Map business critical processes in the enterprise to investigate places where content can be captured earlier and transmitted directly to important processes.
- Audit your inbound content and the way that content is handled, and review how classification or automated capture tools can feed downstream processes in order to improve productivity and speed up response.
- Review the performance of your existing capture technology and methodology, and analyze whether a new model or new technology is needed to increase efficiency and ROI.



References

¹ AIIM Industry Watch Paper free Progress – measuring outcomes www.aiim.org/research



About the author

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About OnBase

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OnBase is a single enterprise information platform for managing content, processes and cases. Providing enterprise content management (ECM), case management, business process management (BPM), enterprise file sync and share (EFSS) and capture all on a single platform, OnBase transforms organizations around the world by empowering them to become more agile, efficient and effective.

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