Content management

How to use data capture technology to eliminate bottlenecks

INTERVIEWED BY JAYNE GEST

If your organization manages content and data flow, whether that's printed invoices or electronic data, you're engaging in enterprise content management (ECM). ECM is the technological name for document management solutions. From large corporations to small businesses with a few employees, an ECM strategy can help your organization organize and track data.

"ECM solutions allow you to eliminate silos, where each department or individual manages their own documentation and information," says Nano Zegarra, chief technology officer at Blue Technologies.

When you're sharing information across the organization, an ECM system can manage it and access it from a central area. It keeps data from going missing and minimizes duplication. But even if you're already using an ECM system, data capture technologies can help speed up data entry.

"These solutions don't take vacation days or get sick," he says. "They don't go for water and get stuck talking for 20 minutes. They just keep processing, which makes your people more efficient and able to do more with the technology."

Smart Business spoke with Zegarra about the benefits of data capture solutions.

NANO ZEGARRA
Chief technology officer
Blue Technologies

(216) 271-4800, ext. 2260
nzegarra@BTOhio.com

WEBSITE: For more information on how data capture management can fit your business needs, visit www.btohio.com/products-services/imaging-solutions.

Insights Technology is brought to you by **Blue Technologies Inc.**

What is the biggest bottleneck of ECM?

In almost any organization, employees manually type data from paper or one screen to another, using programs like Microsoft Dynamics, QuickBooks, SharePoint or others. This is considered indexing or manual data entry. It's always the biggest bottleneck of ECM because it is a low value, time consuming task.

Not to mention, if someone enters data incorrectly, the mistake could be costly. Payment might be sent to the wrong vendor. Or, you could miss an early pay discount.
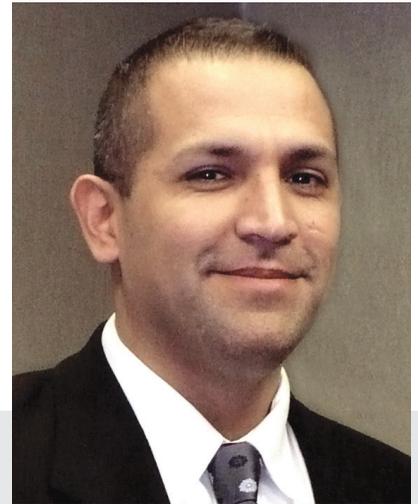
How do capture technologies help with the painful task of indexing?

Capture technologies scan documents and extract values, pushing the information where it needs to go, whether that's QuickBooks, Great Plains, SAP or another business application. You might even have two systems that don't connect, but today's data capture technology can help fix that.

When using data capture, employees don't type. They serve as quality assurance, overseeing the process if something is read wrong or an anomaly pops up. The technology can even validate data picked off of the document with existing information in another system. The benefits include:

- **Reduced costs.** There are reduced labor costs to ship documents, manually enter received data, store the physical data, etc.
- **Faster processes.** Automation means fewer touch points are needed along your process line. Accurate information is more immediately available for your staff.
- **Optimized workforce.** Automating low-level tasks frees up time, allowing employees to work on higher-level tasks, maximizing productivity.

When a small or midsize company grows, the last thing it wants to do is add bodies in the back office so staff can enter data and process information. Data capture solutions can bridge the gap when a company has a large acquisition or sale, and more business and documents start coming through.

Does there have to be standardized forms so information is read correctly?

This technology has evolved considerably — it learns as it goes. It can capture unstructured data. If you have 500 different vendors, you don't need to create templates. You can set rules, such as, no invoice should be over X amount; if it is, flag it because something isn't right. Or, look for shipping rates, states and logos in order to identify the vendor and validate the data against the enterprise resource planning system.

How can employers get started?

Business owners may not realize how much time data capture technology can save. They just see people typing away, or stacks of paper, and the errors every now and then. Data capture technology brings efficiency in the long run, because people's time is always expensive. So, find out: Does this make sense for us? Is it worth the investment?

Also, plan for the future and get the right advisers involved early. Don't put a Band-Aid on the problem because of cost. The savings won't be worth it if in eight months your company outgrows the solution. This technology has all types, prices and functionalities. Work with your technology adviser to find the right capture solution that will change and grow with your business. ●