Information Capture Solutions
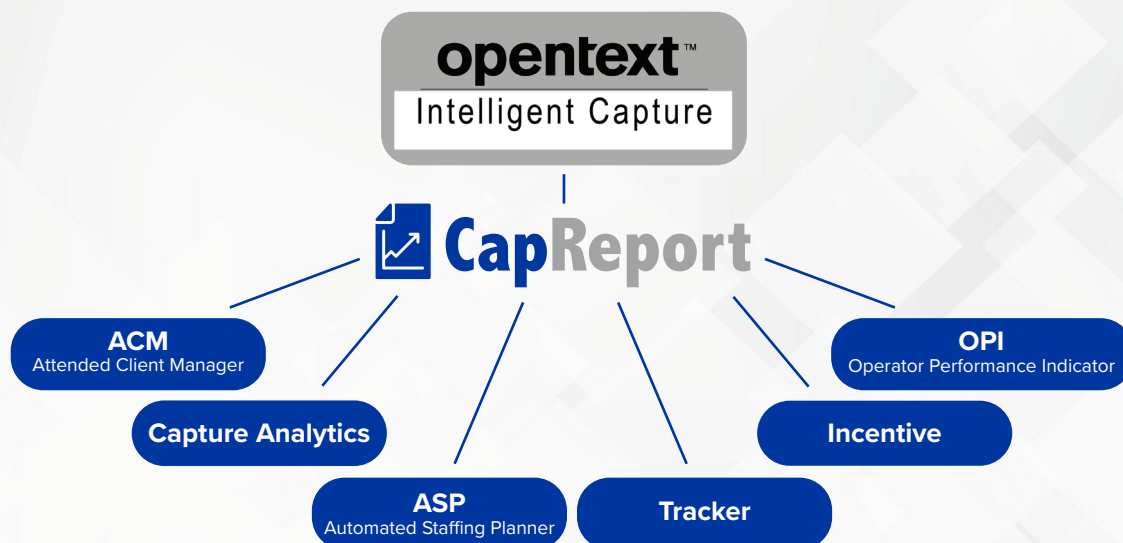
Intelligent Capture Reporting Management Suite

Information Capture Solutions provides Intelligent Capture Users with never-before-seen reporting and analytical tools to manage their capture environment and workforce more efficiently and effectively.

OpenText Intelligent Capture is an industry leading enterprise capture platform that provides organizations the ability to automate processes and capture the data and information they need from their complex business forms and documents. Utilizing AI and Intelligent Process Automation this product provides those needing to capture and accurately route vast amounts of data and information the ability to do so in an efficient and cost-effective manner.

However, those Intelligent Capture end users such as large insurance firms or Business Process Outsourcers (BPO's) may find themselves needing more in the way of reporting and analytics to truly understand and unlock the potential of the Intelligent Capture Platform. The Intelligent Capture Product provides unmatched capabilities in the way of data collection and validation but does fall short in the way of providing reporting and analytics for those that are utilizing the product to manage vast amounts of information. How do you know that your system and operators are performing to the standards you expect?

That is where ICS comes in. ICS has filled this void with its suite of reporting and analytical tools built to monitor, report on, and analyze all aspects of the intelligent capture environment. ICS is a certified OpenText reseller and developer and has also been an end user of the product for multiple decades. Throughout the years of working with the product ICS has developed a multitude of add-on reporting modules to provide the analytical capabilities it required to truly manage its operation and environment.

Let's take a look at the individual modules and how they provide Intelligent Capture end users with never-before-seen reporting and analytics on the efficiencies of their system and operators.

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CapReport

CapReport is an intuitive reporting database built for Intelligent Capture and designed to provide OpenText Intelligent Capture users with detailed reports currently unavailable in the standard reporting interface. Leveraging SQL Server Reporting Services (SSRS), CapReport users can now monitor and report on all aspects of their capture environment providing never before seen analytics on system throughputs, operator speeds and accuracy, document/batch tracking, along with export and reject tracking. Reports can easily be scheduled and automatically delivered via email using the built-in scheduling feature within SSRS.

CapReport provides OpenText Intelligent Capture users with secure web-based access to the data and information organizations need to more effectively manage their personnel and data capture environment. CapReport fills the gap where standard reporting falls short and allows users to store and access information currently unavailable in the base install of OpenText Intelligent Capture. CapReport allows organizations to unlock and understand the full potential of their capture environment.

Attended Client Manager (ACM)

Many Intelligent Capture Customers realize that navigating through Administration Console can be a bit challenging, and if they have multiple jobs or processes to review this task becomes even more daunting. ICS has recognized this issue and has created a simplified new front-end interface, Attended Client Manager (ACM), to launch queues.

ACM is designed as a single interactive dashboard, displaying all manual processes, giving the end user a total number of tasks available for each manual process. At a single glance, the operator can see where the heaviest volumes reside or where a potential backlog may exist. Combined with the dashboard information, ACM allows the operator to

easily launch a selected task. Additionally, ACM combined with the ICS CapReport module will provide users the ability to track session time per operator for each individual process or que. This allows for valuable reporting on operator time and statistics.

Capture Analytics

Currently Intelligent Capture does not provide a straightforward way to test the effectiveness of changes made to an Advance Recognition Project, leading to increased risk and manual testing time. That is why ICS developed Capture Analytics, a simple and easy to use tool that provides end users the ability to quickly see the impact their changes have made on the capture flow process.

Capture Analytics is a process that provides developers and testers the ability to verify changes to Open Text Intelligent Capture Advance Recognition Projects efficiently and effectively. Allowing the two teams to work together to mitigate inherent risks in making changes to the Recognition Projects. Capture Analytics also provides the option to test Data Cleanup and Keying behavior for the end users.

Automated Staffing Plan (ASP)

How much time do your Intelligent Capture managers spend creating daily or weekly schedules to oversee operators ensuring that they are working in the correct queues? How do you verify which operators perform best in each queue? ICS has developed the Automated Staffing Plan (ASP) to give managers the knowledge they need to manage their team in the most effective way possible and reduce labor costs wherever possible.

ASP is an automated solution that complements Intelligent Capture to automatically give managers the ability to see most efficient use of their operators by placing them in the Intelligent Capture queues that they are most productive in. You will always know which operators to place in each queue to be the most

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productive you can. ASP provides Intelligent Capture users the ability to gain efficiencies by reducing both labor costs as well as management time spent overseeing queue volumes and available labor resources.

Tracker

ICS has developed a comprehensive mailroom tracking system to efficiently track and report on all mail and/or document receipt, opening, and sorting processes. ICS allows customers to track all incoming documents from time of receipt through to image and data export.

ICS Tracker provides users with the ability to track turnaround time while understanding and reporting on which operators handled the documents through every step of the mailroom process. ICS Tracker provides document integrity through every step of the process and ensures that mail and documentation is processed correctly and in a timely manner.

Mailroom and Data Entry Incentive

Incentive by definition is anything that motivates or encourages one to do something. In the document processing world, incentive provides the motivation for both the business and staff to do more in the same amount of time. ICS has implemented tools for both Mailroom Incentive and Data Entry Incentive to allow staff to reach higher levels of productivity with the ability to earn more income.

Mailroom, the starting point for all paper documents entering a service organization. These documents must be extracted from their envelope, reviewed for business rules, separated into logical batches for processing, and prepped for scanning. If this process is slow or labor intensive, it can prevent documents from being processed in a timely manner. On the other hand, if this process is streamlined and operators have the ability to make more by doing more, both the business and staff will prosper. ICS has implemented a Mailroom Incentive Program that establishes base

rates for each job in the mailroom so that clerks who exceed the expected productivity levels will be rewarded. The Mailroom Incentive Program works hand in hand with the ICS Mail Tracker application that ensures all work is barcoded and tracked throughout the workflow, providing complete coverage of each step of the process. By providing incentive, mailroom staff are continually looking for ways to make the process more streamlined and efficient and win for both them and the business.

Data Entry is complex, multiple business rules and requirements make processing a document through to completion difficult to do quickly and efficiently. Operators must be able to successfully transition from one job to another throughout the day based on mail volume and delivery schedules. In order to provide the data entry staff with motivation to quickly process the work and transition smoothly from one job to the next, ICS has implemented a Data Entry Incentive Program that establishes base rates for each job. Data Entry Operators that exceed the expected productivity levels for each job are rewarded based on not only their productivity, but also their quality. Each operator has a portion of their work quality checked each day, the higher the quality they achieve, the higher the incentive amount they earn. Conversely, if an operator is not meeting the minimum quality standards, no incentive can be made. With the recent addition of the ICS Operator Performance Indicator (OPI), operators now receive feedback on their productivity percentage towards base with the border color of the keying application, updated real-time every 5 minutes. Operators now know how they are doing and whether they are exceeding the base thresholds set to make incentive.

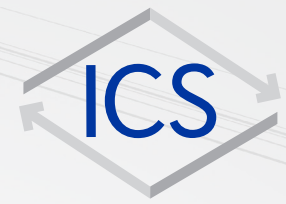## Operator Performance Indicator (OPI)

Performance and efficiency are crucial to the success of any business, not only for the business, but also for the staff performing the service. Without the tools to provide feedback to that staff, they may not truly realize their actual performance and efficiency. ICS has

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Operator Performance Indicator (OPI)
(continued)

developed the Operator Performance Indicator (OPI), a tool by which operators can know exactly how effective and efficient they are in achieving production levels that will allow them to earn additional incentive pay.

The Operator Performance Indicator from ICS integrates directly with OpenText's Intelligent Capture software to give operators instant feedback on whether they are above, at, or below stated document per hour base thresholds to earn incentive. OPI visually changes the border of the application screen to easily indicate what percent of base they are achieving for the most recent five minutes of production time. OPI works inside the ICS tool Attended Client Manager (ACM), which is a more user-friendly way to choose which job and queue an operator wants to work in Intelligent Capture. Each job and queue have a unique document per hour base set for achieving Incentive that each operator can earn based on performance. Operators that are performing below base will have a red, orange, or yellow screen border as they pass specified thresholds. Operators that are performing above base will have a green, blue, or purple screen border as they pass specified thresholds. Given timely feedback on their performance, productivity increases of 15-50% can be seen across the board for all operators, which means more incentive pay for the same amount of time worked.

About Information Capture Solutions

Information Capture Solutions is certified developer and integrator of OpenText Intelligent Capture with over two decades of experience working with the product.

If you would like more information
on Intelligent Capture or how to unlock to most from your capture processes by enhancing your reporting capabilities, please contact Information Capture Solutions.

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