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eBOOK

Intelligent Forms Automation

Automation Process forms quickly and accurately

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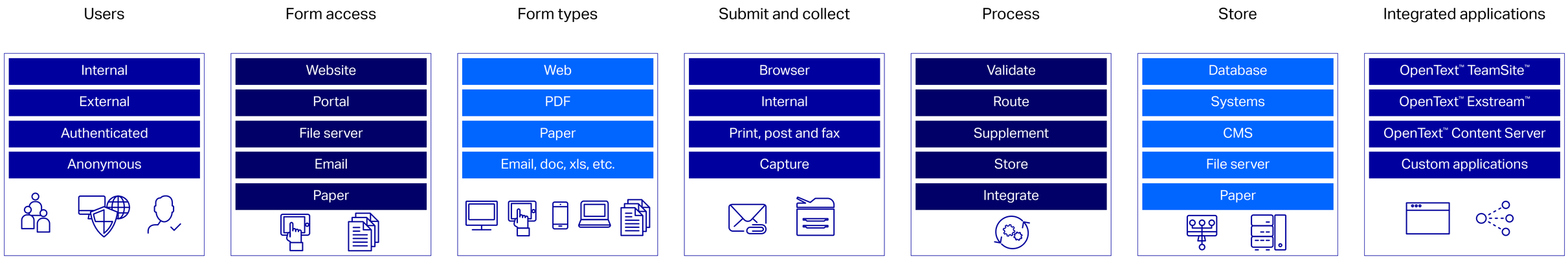
Content

Intelligent Forms Automation

Intelligent Forms Automation is a comprehensive platform that enables organizations to develop and deploy solutions for collecting and processing information. While there are many niche products that focus exclusively on web forms, capture or business process automation (BPA), Intelligent Forms Automation delivers a complete omnichannel platform to collecting information.

This enables organizations to deliver an exceptional customer experience, while simultaneously processing information in a unified and automated way.

This eBook explores different Intelligent Forms Automation use cases and why it is a complete platform to help an organization carry out its digital transformation strategy.



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Forms capture

In an ideal world, the data and documents most needed for business processes would be captured at the source using electronic forms, instantly validated and then fed into the destination systems where it can be used as required.

To cope with the volume of paper most organizations still process, capture solutions provide a paper on-ramp to automate the digitization of paper and enable further processing using electronic versions. Automation of the capture process minimizes manual handling of paper to improve efficiency, as well as the accuracy of content.

Document capture types include:

- **Ad-hoc document capture.** The on-demand capture of general-purpose documents, often into a document or records management system. A typical document might only include an image, and optical character recognition (OCR) can be employed to create a searchable document. Capture devices typically include desktop scanners and multi-form printers (MFPs), but mobile devices as well built-in cameras are increasingly being used as well. Examples of documents appropriate for this type of capture include expense receipts, signed contracts and identification for customer or employee onboarding. The market for ad-hoc document capture is wide, although for those with OCR capabilities, it is common to see a small number of embedded OCR engines.

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Forms capture

- **Batch document capture.** High-volume capture of general-purpose documents, often into a document or records management system. Capture might simply involve an image but may rely on OCR to create searchable documents. Capture devices typically include high-volume scanners and MFPs. This type of capture is ideal for mailroom requirements and back-scanning for electronic records management. The market for batch document capture is comparatively smaller, with user interfaces designed to process large batches of documents.
- **Data capture.** Support for ad-hoc or high-volume capture of forms and documents that can be extracted for use in a business process or system. Data capture technology can recognize machine print (optical character recognition), handprint (intelligent character recognition), barcodes and marks (optical mark recognition) and more. Capture devices typically include high-volume scanners and MFPs. Data capture solutions are targeted at solving specific cases, including structured and semi-structured forms, such as invoices.
- **Structured forms.** The accuracy and speed of data captured from paper documents typically determines the success or failure of a forms capture project. Where possible, structured forms designed specifically for data capture can be used to significantly increase both the accuracy and speed of capture by enabling fast processing of large volumes of forms and minimizing any manual review that might be required. Structured forms are common in all organizations, for example insurance and banking, where customer information is required, and in HR groups where employee information is captured. Structured forms and electronic forms are typically used to capture data from both paper and digital sources.
- **Semi-structured forms.** Often, forms that require processing are not standardized and, while they may contain structured data, the information needed may be different in each document captured, such as an address. Unlike structured forms, processing semi-structured forms requires a solution to determine the location of the required data on a page, recognize the format and then extract the data. As such, it can be more of a challenge to implement a solution, and processing is typically slower and more error-prone. Techniques to recognize and extract data may include rules-based and selflearning approaches. Examples of semi-structured forms include invoices.

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PDF forms

PDF forms are pervasive and will continue to exist across all organizations. With the advent of web forms, it was believed that PDF forms would become obsolete. The new digital era would enable a more user friendly experience, with companies quickly evolving and maturing IT ecosystems to support a complete web-based forms experience. However, this has not transpired. The reality is that PDF forms remain ubiquitous, with many organizations using them for capturing data.

PDF forms have also endured because of their consistent appearance, regardless of the device they are displayed on. Whether viewed on Microsoft® Windows® or Mac® OS, an iPad®, Chrome OS, Android or any other environment, the information contained in a PDF (fonts, pictures, charts, etc.) remains unchanged. Also, what a user sees after hitting save reflects what anyone else that views the document will see.

In addition, PDFs allow for fine-tuned security settings. Users can disable printing, comments or the copying of text. This enables governments and businesses to heavily restrict forms to prevent abuse. For more security, users can also password-protect a PDF.

Unlike any other forms product on the market, OpenText™ LiquidOffice™ 16.6 puts intelligence behind PDF forms. Users have access to key features that support the delivery of integrated form solutions, and it enables any file to be published as a standalone document and made available to users in the LiquidOffice portal. Insurance claim forms, for example, can be published alongside other benefits forms. In addition, LiquidOffice forms can not only be published as standalone documents, but also as flattened PDF forms.

The important difference compared to standard LiquidOffice forms is that these forms can be accessed, downloaded and shared easily from the portal. Previously, PDF forms could only be opened from a browser with an Adobe® Acrobat® plug-in and submitted online. Now, they can be opened by any PDF viewer and, when flattened, forms look and print consistently.

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PDF forms

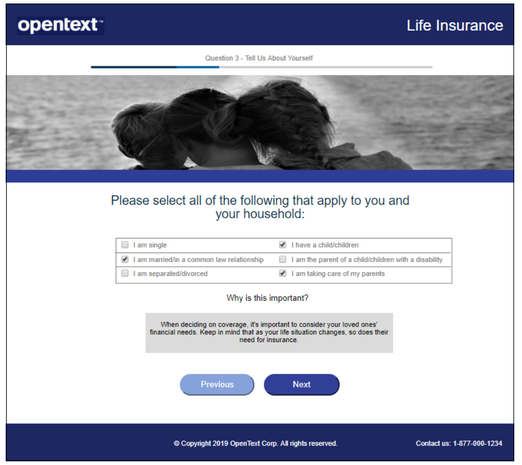
LiquidOffice 16.6 also introduces powerful features for standalone PDF form processing. Organizations can:

- Leverage a new and innovative way to process PDF forms, significantly improving user experience and replacing manual form handling processes.
- Enable users to fill in a PDF form using Acrobat, submit the completed PDF form using email or other methods and automatically process the PDF form.
- Avoid printing, completing by hand or mailing in the form for end-users.
- Bypass scanning, data entry, capture or review and validation of information when processing the form.
- Eliminate mistakes. Data, which is extracted directly from the PDF form, is always accurate.

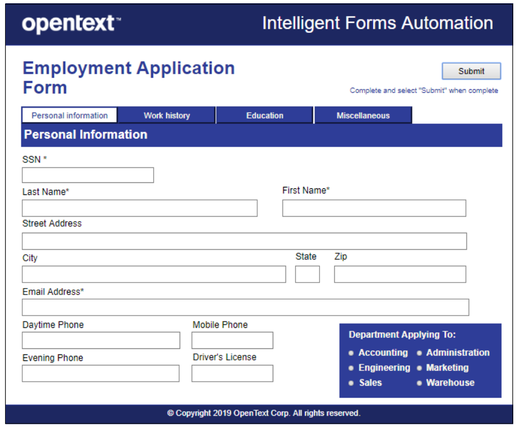
eForms and web forms

As with PDF Forms, eForms and web forms capture information directly from the source, such as a customer, patient, citizen or employee, and validates it before routing it to another system or person. The biggest difference between web and PDF forms, however, is the user experience. PDF forms are rigid in that they follow a strict sequence. They can also be intimidating to complete, especially when lengthy and complex. In contrast, web forms are easy to use and logical, offering decision support, multiple web page tabs and visual aids to help the user complete the form. Users are more likely to complete the form with accurate information, expediting the delivery of a product or service request.

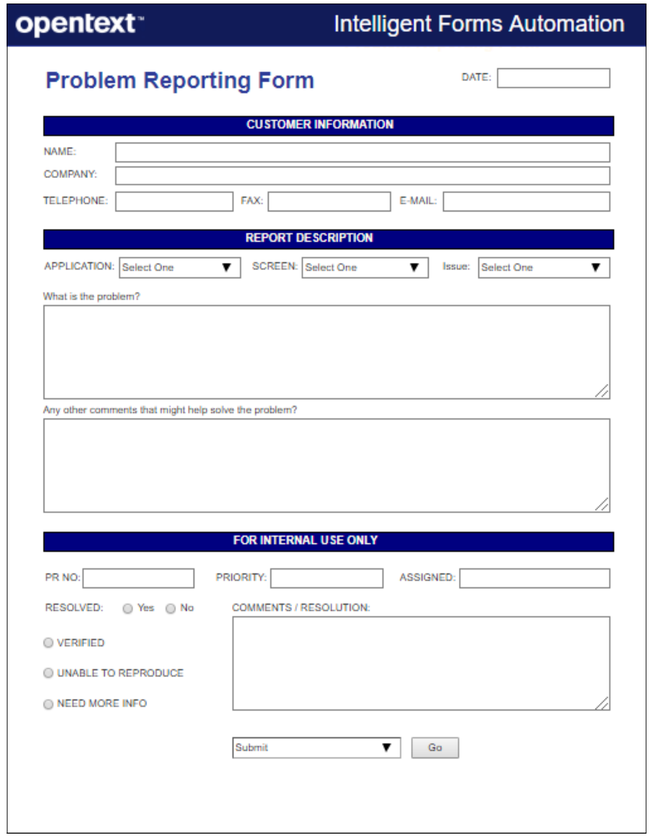
Unlike a PDF form, web forms are more conducive to providing an enhanced user experience that adapts to a mobile or tablet device. Again, the dynamic capability of a web form provides a better overall experience than traditional PDF forms.



Multipage web form



Multipage tabbed web form



Single page web form

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Process automation

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Integration with OpenText CEM

OpenText's Intelligent Forms Automation solutions seamlessly:

- Capture and process information from customers.
- Facilitate online interactions with customers.
- Manage the processes involved in Customer Experience Management (CEM) solution development.
- Enhance and extend the capabilities of CEM solutions.

As a touchpoint with customers, forms enable the collection and exchange of information that initiates and advances customer driven processes. With Intelligent Forms Automation, organizations can create a great first impression, providing customers with a rich, targeted and tailored form, online or on paper. It also provides immediate feedback on information entered and ensures it is delivered immediately to its destination for efficient, automated processing.

Being able to manage customer interactions helps organizations migrate customers to digital channels at an appropriate pace while ensuring no customer is left behind, which is especially important as paper continues to be essential.

Intelligent Forms Automation enhance CEM solutions by providing a potentially seamless, single-vendor option, not only for customer interaction and information exchange, but also for more efficient CEM processes where review and approval of content is needed. Organizations can:

- Interact with customers using rich web and paper forms to capture and exchange information.
- Extend CEM applications to accelerate customer processes.
- Automate CEM solution development and delivery.
- Capture information for CEM solutions using PDF forms, web forms, mobile forms, electronic documents, paper forms, email, fax and scanning.
- Communicate with customers to gather feedback and manage customer surveys.
- Interact with customers, capture information and documents, manage communications review processes and complete customer on-ramping with CCM solutions, such as OpenText™ Exstream™.
- Provide an additional customer touchpoint to capture information and interact using WCM solutions, such as OpenText™ TeamSite™.
- Manage content review and approval processes with DAM solutions, such as OpenText Media Management.

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Digital transformation

While paper shows no sign of disappearing any time soon, the use of electronic forms to capture information will continue to increase at even a faster rate.

OpenText's Intelligent Forms Automation solutions provide customers with a product suite in that can bridge paper, digital and hybrid scenarios.

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit opentext.com.

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