



# Major Bank's Continuous Learning Programs Get the Grades with Digital Scanning



**The Institute for Learning . . .**, a division of the Bank of Montreal, trains banking employs on new techniques and lending services for internal and external customers. Students attend the Institute courseware after which testing and course evaluations are performed to measure the learning experience.

## The Solution

The Institute automated the entire data collection and forms design process internally using Verity TeleForm and Bell & Howell double sided B size scanners. The look and feel of both the answer sheets and course evaluation surveys were designed with Teleform for each unique course offered by the Institute. Most forms were created on a single sheet of 11" x 17" paper that was folded when provided to the students for completion.

## The Challenge

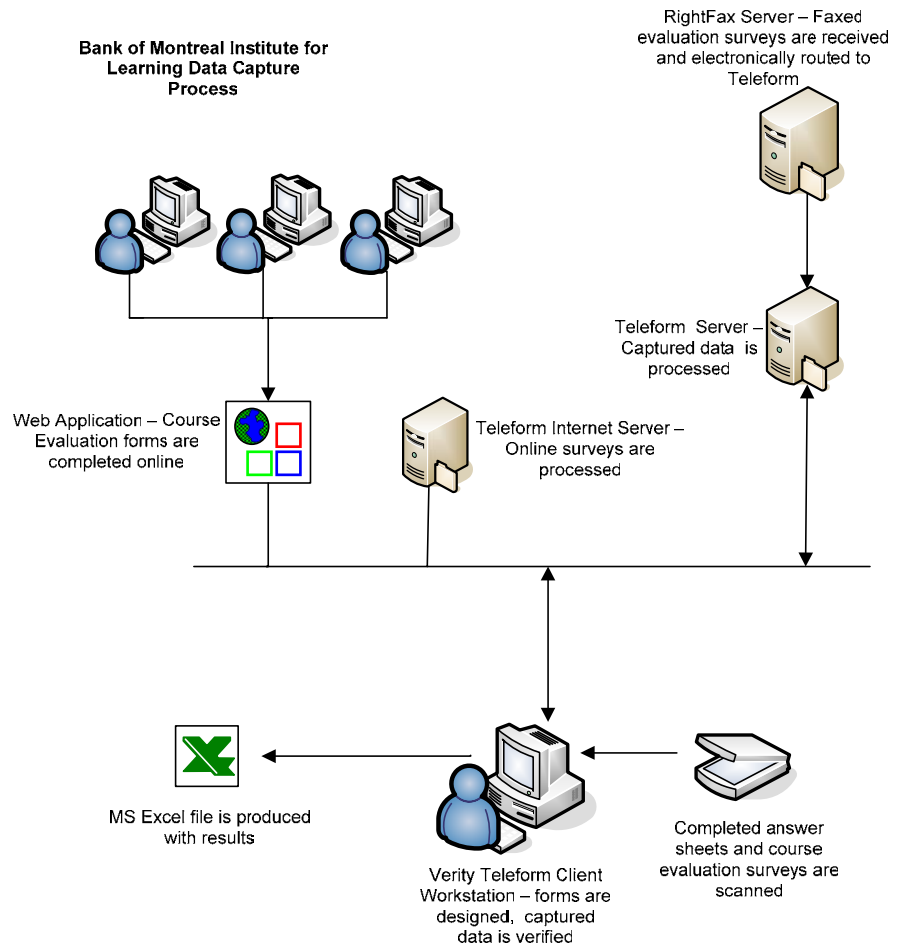
With many courses operating throughout each day, the Institute was challenged with how to administer and collect test and course evaluation forms for both instructors and students. Test forms are colour coded, uniquely identified by student and may be several pages in length with many different questions types. The data from each test had to be manually entered into the Institutes computers for scoring and evaluation. With several hundred forms being returned each day, the task of entering the data was very labour intensive. Similarly, the Institute's course evaluation survey required the same process and had to be uniquely managed. A scanning and information capture system was needed by the Institute to simplify and streamline the data entry process.

Completed answer sheets and course surveys are submitted to the Institute as students leave the course (returned by hand at the completion of each course). Alternatively, surveys can be completed and faxed in at a later time. Additional convenience had been added for students enabling them to complete the course evaluation survey electronically on-line or within the companies internal network. All inbound faxes are received by RightFax with 4 lines to eliminate the likelihood of students receiving a busy signal when faxing surveys in. All faxed course evaluation forms are electronically forwarded to TeleForm for hands free data capture and processing.

CASE SUMMARY	
<b>Company:</b> Institute for Learning—Bank of Montreal, Toronto	
<b>Industry:</b> Financial	
<b>Application:</b> Data Capture	
<b>Challenge:</b> Implement a data capture system to eliminate the manual entry of thousands of completed evaluation forms and answer sheets.	
<b>Solution:</b> TeleForm Enterprise, TeleForm eForms Option, two 11"x17" B format duplex Bell & Howell scanners, RightFax Business Server	
<b>Results:</b> The data capture system reduced and almost eliminated the need for manual data entry of hundreds of forms each month. No manual intervention is now required to process faxed in course evaluation forms.	

## The Results

The hundreds of answer sheets and evaluation forms the Bank of Montreal's Institute for Learning receives weekly are now scanned and the data captured is easily filed electronically for processing. Each student now has the convenience of choosing the most appropriate method to return the form. Also, with Teleform Enterprise and the eForms module, the Institute has been able to design well over 100 paper and electronic forms to date for use in their education programs. The Bank has required fewer people to collect and digitize the results of each course it offers and has achieved significant savings on the costs normally associated with capturing high volumes of information each day.



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