

# Optimal workflow

## How technology is helping people scan smarter, not harder

INTERVIEWED BY JAYNE GEST

Scanning documents is still a considerable part of the workflow for most companies, whether it's a matter of scanning contracts, invoices, reports or other paperwork.

When human resources, accounting, legal or general administration — really anyone processing files — can optimize that workflow by streamlining the process, time saved is money saved.

“People are trying to work smarter, not harder,” says Lauren Hanna, director of sales at Blue Technologies. “The largest cost to any business is labor. It's beneficial to optimize the workflow. You can get your document to the right place faster and more efficiently.”

*Smart Business* spoke with Hanna about some of the features on your multifunction printer (MFP) that can increase your organization's scanning productivity.

### Where do you see inefficiencies when it comes to scanning?

Many times, people scan-to-email themselves, or they scan to a desktop shared file where they must open that file, rename it and save it again. They also may have to run it through some additional software at the computer to make it a searchable PDF or convert the file to another format like Word or Excel.

Consider this scenario, used across many workplaces. You receive a newly signed contract. It must be scanned as part of your approval process, so you scan it to your email. Afterward, you head back to your desk and right click to save the file onto your desktop or network file. Then, you email that document to two other departments so that the

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contract gets processed. It may not sound like much, but multiply that process by hundreds of contracts, and it adds up.

### How can businesses use their MFP to reduce the time it takes to process these files?

There are many ways to reduce the time it takes to complete your workflow.

Newer MFPs have a number of features that can automate the processing and routing tasks your employees may be undertaking manually. You can set up workflows that will condense the number of steps and allow you to take those actions right at the machine as files are scanned. This saves time and reduces the likelihood of human error because you're taking a multitiered approach down to one or just a few steps.

Other features that MFPs have include the ability to:

- Name files at the MFP.
- Route files to multiple destinations.
- Merge files or distribute documents to wherever needed.
- Add a watermark.
- Convert the file format.

You also can set up parameters to redact information. Therefore, confidential information, such as Social Security or driver's license numbers,

isn't being scanned across the network.

In addition, you can add optical character recognition (OCR) at the machine, so it's no longer a flat PDF or image file. Then, you'll be able to highlight words, cut and paste, and search for keywords. If you're scanning a 20-page contract, for example, you can now search for a specific name, clause or term.

Data capture is a useful tool used to optimize workflow and improve process efficiency. This 'grabs' or 'captures' data directly from scans and automatically imports it into different business applications. Using this feature reduces manual data entry from scanned files.

### What else do employers need to know?

Technology applications are highly scalable. As your workflow needs grow, the technology can scale up with your business. It also helps keep your processes uniform and streamlined.

Many employers have benefited when they've taken time to improve their scanning process because nearly every business has an application for this technology that can be applied to their organization.

It's all a matter of working smarter, not harder. ●