

# From Network to Desktop Scanning: Choosing What's Right for Your Business

By Allen Gavlak, Optical Image Technology



## Detangling the options:

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This article will help business readers to learn about the options available for scanning, and to understand how quality scanning at any level—when paired with electronic document management and digital workflow—can optimize business efficiency.



Imaging, BPM/workflow, and  
Document Management Software

The plethora of scanning solutions for business can seem as challenging to untangle as jumbled shoelaces. The well-known adage of “you get what you pay for” can be unsettling, particularly at a time when budget constraints make more robust solutions difficult to consider. Many organizations are unsure whether they really need all of the bells and whistles that a higher-end solution offers. This article will help business readers to learn about the options available for scanning, and to understand how quality scanning at any level—when paired with electronic document management and digital workflow—can optimize business efficiency.

## Detangling the Options: Centralized and Departmental Scanners, MFPs, and Desktop Scanning

An increasing number of organizations are scanning important business documents for future electronic retrieval, regardless of the size of operations or volume of business. Many companies that are joining the herd are small, and may currently address (or plan to address) low-volume scanning needs of documents with the aid of a multifunctional copier or printer (MFP) that they may already own. Some have high volumes of routine documents that are imaged in a central area with large scanners that are capable of imaging dozens of documents per minute, and batches at breakneck speed. Other companies have multiple business units, or departments in diverse locations, whose information is scanned over the Web into a central electronic storage system because the data is valuable throughout the company and needs to be accessible remotely.

What is the basic difference between these systems? How can you guarantee that you will be able to locate the information that you need in the future, regardless of which solution you choose? After your documents are scanned into the system, what else can you do with them to enhance your organization's efficiency and help you to compete successfully in the marketplace?

### 1) Multi-function Copiers and Printers: Understanding the Basics

Photocopiers and printers have advanced tremendously since their inception, and with their sophisticated capabilities today, they remain a viable solution for some organizations. Users of multi-function printers have the luxury of copier, printer, and fax operations all combined into one office machine, and they can scan, store, and tap into basic document routing for no additional cost. MFPs are capable of making standard pdf, tiff, or jpeg files, and commonly allow the user to include information in a single index field, where the user provides the name of the document for later retrieval. Some of these devices enable access to a company's email addresses as well as basic distribution of scanned documents; however, it is important to differentiate these abilities from true digital workflow that is integrated with a company's line-of-business systems and the resulting end-to-end processing efficiencies it can achieve.

An MFP scanning solution is often the least expensive option for many businesses, especially if they already own a device with the necessary capabilities. It provides many of the requisites for basic document management and serves as the springboard to true efficiency. While they are a good option for many, MFPs are more likely to be a viable option if they are not the only solution that exists within an organization, due to their limitations.

Companies or business units that have multiple document types, or documents that are in demand from parties who would search for the document in many ways, may be challenged by some of the confines of MFPs. Persons looking for a document by its creation date, author, the location of the business that sent the document, etc., are limited by its indexing restrictions unless they integrate their MFP with a document management system. Document management software that is integrated with the scanning solution allows the user to add multiple indexing categories by which the document can later be found, allowing for multiple search criteria.

Another issue companies need to consider with MFPs—if they are to be used as a company's exclusive device for scanning—is whether or not the copier or printer is frequently in demand by other parties. If large volumes of documents are routinely scanned, or if a small volume of documents has to be scanned regularly on a machine that is in great demand, an MFP may not be the best option to choose as an exclusive solution.

## 2) Departmental Scanning: Putting Departments in Charge of Their Documents

In an organization with branch offices or defined departments in diverse locations, in cases where departments have sensitive documents that only a designated, responsible scanner's eyes should see, or instances where a centrally placed MFP would be in constant demand, a departmental solution may be a more logical option. Human resources departments, accounting, and payroll frequently benefit from departmental scanners due to information sensitivity. Equipment used for departmental scanning ranges from low-volume scanners that cost a couple thousand dollars through high-volume scanners that can be considerably more expensive, depending upon the speed and level of sophistication that is needed.



A distinct advantage of departmental scanning is the fact that the people within the department are very familiar with the documents they are scanning. This results in easy recognition of items that have not scanned properly, better-quality data,

and more relevant and thorough indexing. If the data that is scanned into the system is of value to other departments within the business, or if some of the data is sensitive and needs to be secure while other information would be valuable to share beyond the department, then the next logical step is to scan each department's data into a central document management repository. This enables sensitive data to be locked down for secure and limited viewing by preauthorized departments and/or individuals. It also makes data that is important to other departments available to them. This helps businesses avoid redundant scanning in multiple departments and re-keying

of information when data on a form is needed by more than one business unit.

## 3) Centralized Scanning: High-speed Scanning Meets High-volume Document Flow

A centralized scanning station is usually deployed by organizations that have funds for sophisticated scanning equipment (a single scanner can reach well into five figures), and the space to house several large, high-volume scanners in one central location. In some instances, the station may be networked with a distant information repository via the Web. In other situations, this may not be deemed necessary or even desirable, at least not in the short term. Organizations with a high volume of incoming documents need to keep pace with documents as they are received, especially in industries where service level agreements require that they are handled within a short period of time in order to avoid penalties. Large volumes of multi-page standard documents can be scanned, indexed, and ready for viewing or action in a minimal amount of time.

Despite these advantages, there are some challenges to high-speed scanning if it is the only solution that is deployed. Central scanning staff may be faced with multiple documents that are unfamiliar, slowing the process of recognizing errors. The staff's lack of fluency with diverse documents may result in a higher number of scans that are not immediately recognized as having poor images or data. In the case of documents that are not routed into a central document management system and are retrieved by the department that uses them, errors may result, and materials may ultimately need to be returned to the scanning hub to repeat the imaging process. If documents are scanned for pure archival purposes and will not be needed until a distant time in the future, failure to recognize a problem instantly may cause serious challenges when the data is needed. In the future, a requested re-scan may create a time-consuming and costly search for the original, assuming that it is even available and can be located.

High-speed, centralized scanning is an excellent solution when used in conjunction with other options that meet departmental and individual user needs. Since it enables organizations to image documents quickly, it is an excellent choice for organizations that need to scan rooms filled with document archives in an effort to free floor space for other needs. It also makes a large volume of data available quickly, especially when the files that are being scanned are still active.

## 4) Desktop Scanning

Whether you represent a small medical practice, a college or school office, insurance agency, or any other business that requires quick and easy access to information on a regular basis, desktop scanning (also referred to as front-office scanning) provides real benefits. Desktop scanning puts the responsibility for accurate scanning in the hands of the user, and makes it simple enough for people

without basic technology skills to use it. Typically, the scanner is part of an individual's or small office setup, where it may be shared by a handful of employees. The types of documents that they scan are most likely the routine documents with which they work every day, resulting in immediate and improved quality control of the documents and images they scan. In addition, since they are able to view the scanned documents within seconds on their desktops, any documents that require rescans can be recognized before they are removed from the office. This eliminates a potential paper chase in the necessary quest for data integrity.

Desktop scanning benefits users in several ways, providing them with:

- The ability to scan sensitive information directly at the desktop, eliminating the potential for others to stumble across restricted information at a shared MFP or a centralized or departmental scanning station;
- The ability to scan, view, and validate imaged documents without ever leaving their desks;
- The convenience of adding multiple indexing fields beyond the document name that the other systems allow (such as scan date, company that sent the document, geographic location, customer ID number, or whatever may be helpful to other users in locating the document in future searches);
- The capacity to launch digital workflows that take documents to the next immediate step in a pre-set, standard process, such as approving or signing documents. Actions on scanned documents can be initiated immediately upon receipt if the desktop scanner is part of a complete document management system.

Although many desktop scanners are not capable of imaging the same high volume of documents or document batches as the user might be able to achieve with a central or departmental scanner, persons who handle many documents and document types benefit greatly. Less time is wasted in marching to a remote scanner, giving instructions on unique and sensitive documents, pulling up scanned data for review and verification, and returning for rescans. The flow of paper is reduced from the desktop immediately, and information becomes instantly accessible through the electronic storage system without the wait. Users gain better control over their sensitive information. From a small company whose secretary scans incoming documents through a large enterprise that already has other solutions but needs specific end users to scan and manage sensitive materials without the wait, desktop scanning is an affordable, convenient, and intelligent choice.

#### **How Do You Know What is Right for Your Business?**

Unfortunately for those who are looking for an instant and easy answer, this can be a challenge. The right solution is sometimes a conglomeration of scanners and scanning software. Larger companies may have an expensive, high-speed scanner in a

centralized location, as well as several departmental scanners hooked into the Web to allow scanning into a central system from diverse locations. They may also own MFPs for basic scanning, especially in departments that do not require high-volume scanning, and they may have desktop scanners in business areas where individual control is preferred or required.



Smaller companies may have a multifunctional copier/printer and a less complex scanning solution in place, with several desktop scanners for people who routinely collect information that needs to be made available to others, or they may not have any at all. Regardless of what they have, a document management system becomes a gathering place for data collected from multiple sources. It serves as the basis for indexing all of a company's information thoroughly to meet multiple business needs, mechanize records retention policies, and automate routine processes within the business.

The most important steps in finding the right answer for your company are to conduct a candid evaluation of your needs and to make those needs known to the vendors with whom you are working or intend to contract. Get input from your staff and understand their daily challenges. Communicate those challenges clearly and thoroughly to your vendor. A good vendor will listen closely to your needs, will ask a lot of questions to make sure he is not presenting solutions that fail to match present and future needs, and will provide multiple options that you can consider.

#### **Electronic Document Management 101: Making the Most of Imaging**

As an organization grows, its needs change, and diverse business units face unique challenges that may need to be addressed with different solutions. The key is to implement solutions that can be integrated with each other easily, enabling a company's growing amount of critical information to continue to be accessible easily and securely. Management needs to maintain an overview of the incoming work volume and the organization's success in managing it, as well as the emails, faxes, hand-written letters, and other pertinent items surrounding the incoming work. As more people are involved in inputting information, distributing work, and providing services, managerial access to real-time reports of work volume and productivity—as well as information that proves compliance—becomes more critical. Information from multiple systems can make this a tedious undertaking; fortunately, there is a cost-effective solution that addresses these needs and enables a company to manage increasing work volumes without adding staff.

When scanning solutions are tied to an electronic document management (EDM) system, all of the documents, images, indexing information and other data about those documents can be stored in one central location, regardless of the source that is used to image the information. Thorough indexing capabilities make it possible for people who are searching for information in diverse ways to find what they need, much like a person using Google to search for a product or service. Image-enabled document management allows users to pull up images of the scanned documents using their familiar line-of-business software. This provides access to complete information in its original form as well as subsets of data from electronic searches. In addition to scanned documents, data can be collected from on-line or Web-based forms, bar codes, email software, faxes, voicemail, and other sources, making all of a company's critical information available in one place. When you need a complete overview of all of the interactions with a customer, or data that occurred within those transactions, every piece of the information puzzle is available to you. Nothing is reliant on searches or workers' individual or collective memory. The challenges of losing corporate knowledge through employee turnover are eliminated through consistent and complete data collection. No more acquired information is lost ...ever.

A document management system enables a company to move far beyond the scanning and retrieval process, providing comprehensive corporate knowledge and the business intelligence needed to make timely and informed decisions. It allows companies to manage work volumes intelligently. It helps managers to put a system in place to shift work and tasks to pre-designated staff in response to changing priorities and volumes. It enables them to request automatic email notification based on any criteria that might affect decisions, such as system overload, heavier-than-average volumes of transactions coming from specific geographical areas, or even individual companies that may signal a need for intervention. Managers gain an "aerial" view of their company in real time, and can take action promptly where needed. In so doing, they are able to ensure consistent service and gain a competitive edge.

### **Document Indexing: Quality Scanning Lays the Foundation for Easy Retrieval**

In contrast with MFPs and desktop scanners that are set to operate in isolation, an EDM system enables users to index information to the degree of thoroughness that one would find in a leading encyclopedia. New staff, employee turnover, and growth within a company can result in frantic and sometimes fruitless searches for information if it is not indexed in the many ways that diverse groups

of people need in order to search for information. Indexing is the key to maximizing the value of scanned documents and images.

Regardless of the type of scanning solution that you choose, high quality scans must always be an imperative. Although the hardware and software you choose will help to determine the quality of the scan, they are not the only determining factors. Consider the volume, the number of document types that need to be scanned, and the importance of your staff's familiarity with those documents to ensure that good information is captured every time. Make sure that you

have a validation process in place to verify the completeness and quality of scans, or a document management system that verifies scanned images for you automatically.

Also take into account the cost of poorly imaged documents. If you have one central scanner and your poor or faulty images can be caught and corrected later, it may not be of grave concern. If, however, the information you are scanning needs to be available to people

immediately so that they can make important decisions quickly, or if life-saving or cost-saving decisions will be made based on the data you collect, the choice you make should be made carefully. A police investigation or medical decision should never be based on poor quality data. If you value your company's data integrity as much as they do, choose a solution that will achieve high data quality consistently, because everything you do as you advance your digital and business prowess will depend on the quality of your information.

### **Digitizing Records Retention: Document Management Leaves Nothing to Chance**

From accounting transactions to insurance documents to patient records and other documents, government and industry retention requirements differ significantly. This makes the management, retention, purging, and destruction of pertinent information challenging in a manual system. Even electronic information that is stored in multiple places becomes a challenge to manage.

An EDM system takes away the pain of managing information that is stored in multiple places. After you have scanned documents into a central electronic repository, automating the purging process is fairly simple. This remains true if you elect to store your information in diverse software applications and point to its electronic location through a central document management system for easy retrieval. A robust document management system enables you to teach the software your business rules, instruct it to migrate documents at the end of the active document lifecycle or purge them at the appropriate time, and even automate document destruction at the right time. Automatic alerts can be sent to inform you that information is ready

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to be migrated or purged, requesting confirmation from a pre-designated person. Taking the correct action is no longer dependent on calendars and memory. Digging through rules and files and triple checking the details becomes a routine of the past, replaced by the efficiency of automation.

### **Digital Workflow: Scanning Becomes the Launching Pad to True Efficiency**

After an organization has transitioned to electronic storage of all of its documents and established a solid system for thorough indexing and retrieval, the next step toward efficiency is process automation. Just as an EDM system eliminates countless hours in comparison with manual filing and retrieval, automation of routine procedures eliminates inefficiencies. Electronic workflow enables a business to establish pre-set rules for each type of process, instructing the system regarding when it is appropriate to send a document to a specific person or initiate a specific action in a sequence. Workflow guarantees that tasks follow pre-set sequences; and specifies sequentially the required tasks associated with each step. Mechanizing standard processes ensures that business rules are followed consistently each and every time. Additional data that is collected is not only consistent but also complete, and exceptions are all handled in the same manner. Reporting tools keep a thorough record of every interaction with a document, making it easier to prove compliance with regulations about sensitive information and provide information for external and internal audits.



Electronic workflow enables management to ensure that the right people get the right work at the right time. Reporting tools provide management with a real-time overview of incoming work volumes, as well as information about the productivity of departments and their individual employees. Access to updated information enables organizations to provide instant answers and better service to their customers, and helps management to make better and quicker decisions when problems arise.

The world is moving faster today than ever before, and electronic processing helps businesses to keep pace with growth and change. It gives them the information they need to make sound business decisions. No more frantic searches for information. No more customer callbacks. No more requests for up-to-the-minute reports that arrive hours later. No more waiting...period.

### **When the risk assessment plan is in place, what comes next?**

Just as footpaths lay the way for roads, which in turn become the foundations for highways, document scanning paves the path for information efficiency. The best way to get information into an electronic system may vary from one organization to the next; the answer will not be the same for every organization. The key is to take the steps needed to get your information organized and make it accessible, and then to take your first strides with confidence toward the freedom you will experience with a more efficient office.



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