5 Imaging Workflow Essentials for a Remote Workforce

How to Minimize Human Touch in Scanning and Imaging

MARK MESSIER

Product Specialist

OPEX® Corporation

MIKE TALLITSCH

Chief Revenue Officer

Mavro Imaging

OPEX®

MAVRO IMAGING

About the Authors

Mark Messier

Product Specialist, OPEX® Corporation

With over 40 years of experience in document imaging, Mark spent the first 25 years of his career at Scan-Optics before joining OPEX in 2002. During his time at OPEX, Mark has held a variety of roles, including pre-sales analyst, sales support and installation support. Mark's wide range of experience has helped him understand and better educate customers on how to solve their toughest scanning challenges.

Mike Tallitsch

Chief Revenue Officer, Mavro Imaging

Mike's career spans over 25 years in the payments industry, and he has been with Mavro Imaging since 2014. His notable achievements include the design of the United States' first Accounts Receivable Conversion (ARC) program for ACH and participation in the first live ARC client deployment. He was also part of an early market deployment of integrated receivables to corporate accounts, combining electronic and check-based payment processing in one platform. Mike has worked closely with many customers to help them transition to one-touch imaging.

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Introduction

Navigating Document Imaging Workflows for Remote Workforces

Businesses around the world and in many industries have come to accept remote and mobile workforces as the "new normal," especially since the 2020 Pandemic, which became a catalyst for change. Businesses have turned to technology and automation to address several elements of working remotely.

- **Limit on-site staff.** Many employees are no longer working in a centralized office environment.

- **Expanded remote access.** Businesses must consider how employees can efficiently and effectively do their jobs from home.

- **Emphasis on business continuity planning, flexibility and resource planning.** Mapping out the best ways to keep business moving in the face of a disaster will be an essential aspect of planning from here on out.

What do these challenges mean for the everyday workflow? Mail, paper, payments, forms and file boxes are still coming in, but businesses cannot staff the same number of on-site employees to process them safely. In this eBook, we will explore how businesses can address that challenge and cover the five essential components to reducing the number of staff needed to efficiently convert paper into usable images, data and workflow.

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Minimize Paper Touches and Document Circulation

The first step to redefining workflow in our current business environment is to minimize the number of times a piece of paper is touched or a document is circulated. Even state-of-the-art, high-speed scanners can require the involvement of several people, especially to keep them operating at peak speeds. Consider the time and labor involved in opening letters, preparing and batching document sets, date and time stamping, detecting and tracking document types, inserting pad sheets for doctype and envelope, and piecing together ripped documents. And those are just the touches required before the scan!

For many businesses, this manual sort of operation necessitates employees walking around to follow the paper, monitor productivity and address system idiosyncrasies. Decentralization of a remote workforce would make it nearly impossible to continue this type of legacy workflow.

To begin the process of minimizing paper touches, ask yourself:

How many times are we touching a single piece of paper?

How many times do we really want to touch it (end goal)?

What is the cost and risk for both the employees and the business of having so many manual touches?

How can we achieve a single-touch process, specifically at the point of entry?
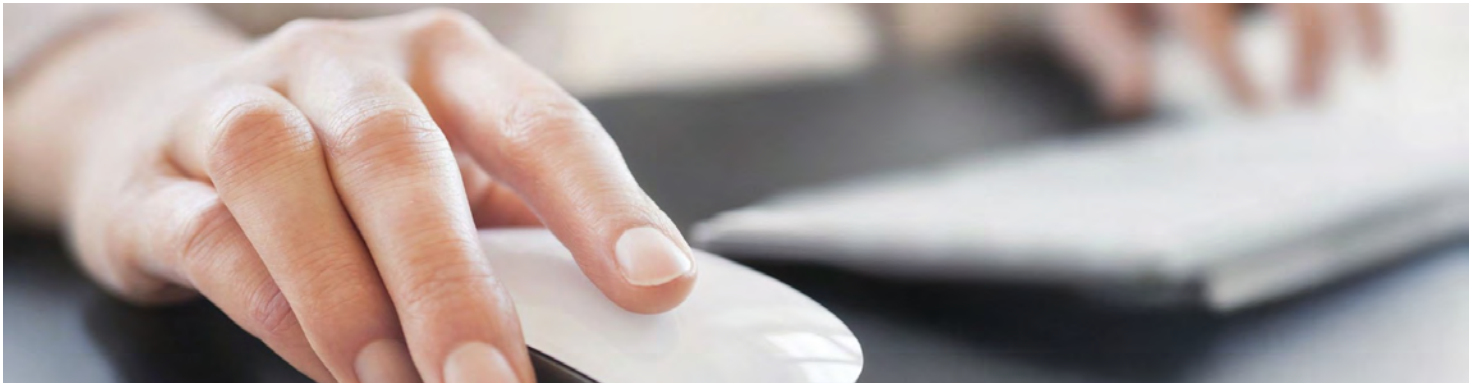
Chapter 2

Decentralize Access to Mailroom Scanning

The second essential to a safe and effective imaging workflow is the decentralization of the corporate mailroom. Most businesses can make this change by routing all correspondence mail to a remittance processing center. A series of automated steps via one-touch scanning and one-touch processing can open, drop, scan, archive and electronically route mail to the appropriate department. This level of automation requires fewer employees physically working together in the mailroom. It also allows data to be scanned earlier, instantly routed, and immediately entered into company workflows, such as an AP system.

By decentralizing access to mailroom scanning, each department resource receives their mail individually, separated and classified on their computer screen. This reduces the risk of interdepartmental issues during physical mail handoffs or deliveries. It also increases productivity for remote workers, as they can immediately receive and begin working on documents and files.

Incorporate Home and Remote Data Entry For Transactions

Many teams are operating via a hybrid setup. Employees whose jobs do not require a physical presence in the office are working from home. Those whose jobs involve physical labor are required to work in the office. The concept of integrating home and remote workers for transactional data entry is a significant aspect of the new normal.

Once on-site employees scan the images, remote employees should be able to take over with any post-scanning activities. To do this, they will need to not only access the images and files but also have the capabilities to alter and enter new data that anyone on the team can then access.

If this is new territory for you, start by exploring whether your current platform can be easily deployed and supported in a virtual manner. Can you add additional licenses and key stations without adding significant expense? Moving toward a digital workforce is not just about meeting the needs of a remote workforce, but also about futureproofing and disaster preparedness.

Incorporating home and remote workers for data entry on transactions is a major part of the new normal.

Chapter 4

Utilize Dashboard Management of Processes

In the hybrid or remote scenario covered in the previous chapter, it's critical to have a dashboard for visibility into key processes and productivity metrics. After all, in a hybrid or remote scenario, managers are not physically with their employees. They cannot walk around and see how their employees are performing or assess whether the new workflow is running smoothly.

A dashboard is critical to measuring productivity and providing management with:
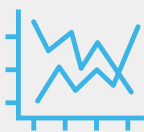
Data that shows whether resources are being optimized and productive

Real-time monitoring capabilities

Proactive warnings about workflow disruptions or potential service level risks

In addition to tracking all aspects of employee performance, a dashboard allows the management team to understand their return on the capital they have invested.

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Automate Manual Processes

The automation of processes is the most critical step in eliminating paper or legacy system limitations to meet the challenges of a remote workforce.

Moving to a one-touch scanning and processing solution replaces all the manual touches that typically surround the scanning/processing of paper and documents. These single-touch systems not only eliminate manual choke points or inflection points, but they also greatly reduce the need for employees to interact with other departments in person. By automatically managing transactions and allocating digital items to downstream systems and processes, you keep employees safe, increase efficiency and improve cycle time.

Automation of processes is the most critical step in eliminating paper or legacy system limitations to meet the challenges of a remote workforce.

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Make the Essentials a Reality with One-Touch Scanning and Processing

Now that we have covered the five essentials of imaging workflow, let's explore two ways that automation can bring them all together: one-touch scanning and one-touch processing.

One-touch scanning: from three steps to one

Traditional three-step scanning, which remains the norm at many businesses today, is a highly labor-intensive and inefficient process due to the imbalance among its three components.

1

Open
In step one, numerous staff sit at desks or mail-opening machines to open an envelope, remove the contents, and then look inside or use a light table to check for any additional contents.

2

Prep Documents
Prep involves even more people and more touches. Employees sit at desks, unfold pages, remove staples, tape torn pages, date-stamp documents, photocopy small items, order pages, insert separators, jog and stack, add batch headers, and so on. Obviously, this step is not a value-added activity. Employees are prioritizing the scanner's or downstream software's requirements over the needs of your company and your clients.

3

Scan
On average, an employee can perform the first two steps at 600 pages an hour. A scanner that feeds 200 pages per minute will consume the hour of opening and prep labor in approximately three minutes. In other words, you would need 20 workers just to keep the scanner running for one hour.

OPEN
Open Envelope
Remove Contents
Check for Left Items

PREP
Unfold Pages
Remove all Staples
Tape Torn Pages
Stamp Receive Date
Copy Small Items
Order Pages
Insert Separators
Jog & Stack
Add Batch Header
etc, etc...

SCAN
Load Stack in Feeder
Wait for Feeder to Empty
Reload Feeder Repeat

ONE-TOUCH
Open Envelope
Remove Contents
Unfold Pages
Remove Most Staples
Feed Pages
Digital Document Classification
Smart Workflow

With one-touch scanning, you simply open the envelope, remove the contents, unfold pages and remove most of the staples. Then you're ready to scan. **This one-touch process creates a leaner, more balanced approach, enabling you to drastically reduce staff, easily comply with distancing and safety requirements, cut prep time in half, and repurpose the post-scanning staff to work remotely.**

One-touch processing: automated input and workflow

While one-touch scanning alone offers significant benefits and allows you to address many challenges you are facing today, adding one-touch processing allows you to automate the entire process. One-touch processing integrates the output from the scanner or mobile captures with electronic-based transactions, such as EDI, ACH, JSON, email, fax and other transaction-based channels.

With one-touch processing, you can bring all those channels together into one automated input, in a standardized workflow that automatically applies your business rules. Instead of an employee manually sorting paper and determining the next steps for a document, a one-touch processing system intelligently matches each transaction and routes it appropriately, all within the limitations of downstream receiving systems, to eliminate potential disruptions.

Bringing it all together in a modern architecture

To support current IT and business needs for remote servers and virtualization, a one-touch imaging platform must provide out-of-the-box support of virtualization and cloud deployment to a Windows environment. With remote servers and other infrastructure elements, security is also a critical part of any solution. Depending on your security and regulatory compliance requirements, you may need to deploy on servers that are CIS Level 1-, PCI- or HIPAA-compliant. And lastly, but certainly not least, end-to-end encryption is a must-have. From the time an item is scanned all the way through to archival, all data and images should be encrypted with a 256-bit encryption package.
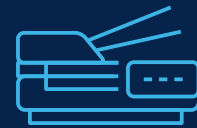
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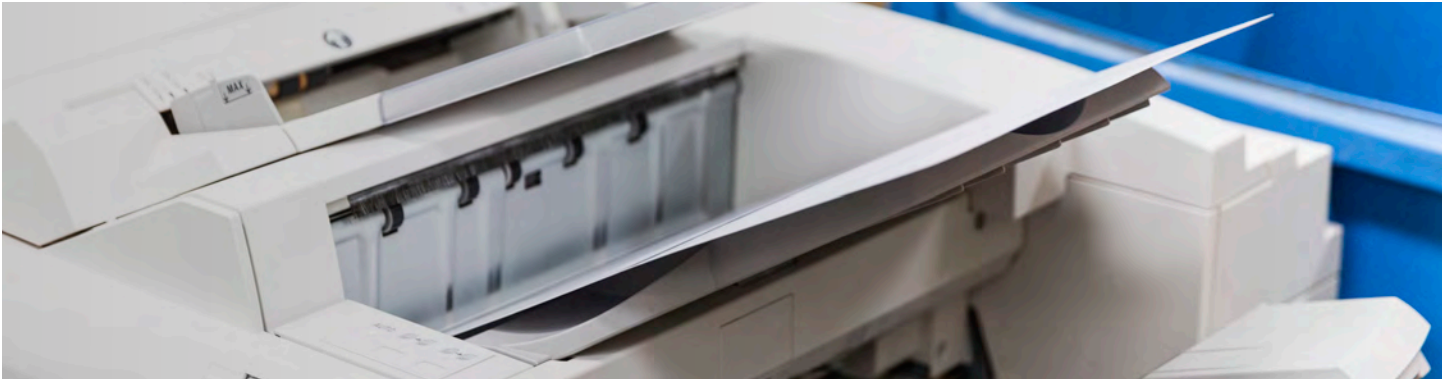
Conclusion

Are You Ready?

Risk mitigation, remote work, and disaster recovery are no longer part of a theoretical planning exercise; they are part of an ongoing business process.

The task of automating a highly manual scanning and processing workflow does not have to be a daunting one. By working with our industry experts, who have successfully delivered projects in environments like yours, your business can implement an efficient workflow that solves the challenges you are experiencing today and better prepares your business for the future.

The task of automating a highly manual scanning and processing workflow does not have to be a daunting one. Start by finding the right partner, scanners and solutions to ensure automation success.

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About OPEX

More than a manufacturer of automation machines, OPEX continuously reimagines technology to power the future for our customers. With an innovative approach and consultative mentality, we engineer unique automated solutions that support our customers so they can solve the most pressing business challenges today and tomorrow.

For more information, visit **digitizeyourdocuments.com**

About Mavro Imaging

Mavro Imaging specializes in intelligent image processing solutions for remittance, forms, and document processing. With a focus on automation, accuracy, and efficiency, Mavro's solutions empower organizations to optimize their operations and reduce costs.

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