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Document Management's Forgotten Element... "No Paper Left Behind"

The first word in document management is often the last thing anyone considers...the Document!

By Mark Messier

Many of the document management and forms processing methods and practices we take for granted in today's modern electronic office, had their origins in the days of ledger books, paper-tape calculators, paper spreadsheets and #2 pencils.

It's easy to forget that these practices, as they evolved from manual methods to key-from-paper and then to image-based data entry solutions, have changed little with regard to their basic workflows. In fact, when questioning why a certain practice is performed a certain way, the only answer that one typically hears is, "Well, that's how we've always done it." Frequently, the people who instituted the practice are long retired and the reasons long forgotten. Its perpetuation is simply a matter of rote performance, essentially a habit.

Even as we have moved much of the activity of document management and forms processing into the relative efficiency of electronic image capture and data entry solutions, there remains a reluctance to even discuss the one area that has truly been left behind... the paper.

In the dark, early days of manual document management and forms processing, long before today's electronic solutions were even a dream, a whole world of physical document management practices were the norm. A piece of paper was received, perhaps by mail or in an interoffice folder. Its receipt was logged, its content assessed and captured, copies made and distributed, its physical storage needs determined... and only after all this, could it make its way to its final resting place in some file cabinet down in the deepest company cellars, where papers went to die. On the way, it ran a gauntlet of perils as it was handed from person to person, department to department and desk to desk, along its winding path. Loss, damage, mixture with other

transactions, separation from associated forms, and unauthorized access were often the consequences. It was a risky, costly, work-intensive, labor of necessity.

Oh, how far we've come! Today we have scanners to image, servers and databases to store, and electronic forms processing and document and content management software to eliminate all that manual, perilous and expensive physical handling of paper! What a relief! Except...the dirty little secret of document management and forms processing is that, until the paper actually reaches the scanner, in most cases, we are no better off today than we were back then! Truth is, what with rampant identity theft, compliance requirements and today's cost of labor, it may be an even riskier, and more costly journey than it used to be.

Why, then does this situation continue? Frankly, it's because most discussions of electronic document management and forms processing begin with a phrase very much like this: "Documents are scanned, then..." Most often overlooked is the fact that there is a physical, living, breathing piece of actual paper involved that has to



make its way to the scanner. Unfortunately most scanning solution providers can offer no better alternative, so the problem is left un-addressed and the costs and risks are simply assumed by all as a given, because, "Well, that's how we've always done it."

So, what can be done? A brief examination of the type of activity that is required to get the paper from receipt to scanning may shed some light on the answer.

Today's modern scanner in a typical workflow, almost regardless of the name on it, is a capable business tool, attaining a state of image quality and speed that renders differences between them somewhat moot. However, each of these traditional style scanners require a substantial investment in document preparation first, in order to make batches of like forms suitable to be placed into their feeder.



By way of a simple analogy, this preparation activity can be likened to asking workers to sort through a shuffled deck of cards. One person is handed the deck and asked to sort out all the face cards. The remaining cards are then passed on to another person who must take out, perhaps, all the even cards. In the meantime another person is asked to take the stack of pre-sorted face cards and remove the kings and jacks, while yet another sorts through the remaining odd numbers, taking out the fives and nines, and so forth and so on until the goal of a nice, neat stack of Aces, and a stack of twos, all the way through a stack of kings is achieved. Only now is the work ready for scanning with a traditional scanner...after the addition of batch headers, insertion of separator sheets, logging, interim physical storage, etc, etc, has been completed, of course.

Take tax processing for example. In this case, envelopes must be sorted and opened, often needing to be cut on three sides so they can be scanned without causing a double feed on the scanner. The contents must then be extracted, the type of tax return identified by the operator as one of numerous transaction types; money, no-money, singles or multi's, on time or late, resident or non-resident... the list goes on. Like transactions must be counted and placed into stacks with batch headers affixed to each, identifying the batch number and type of transactions

in the batch. In the case of multi's, where the taxpayer sends multiple checks with one return or vice versa, separator sheets must nearly always be inserted to establish boundaries between one taxpayer's return and another's. Staples must come off, received and processed dates stamped, damaged forms repaired, barcode stickers attached. Logs must be filled to track the batch as it moves physically from location to location on its way to the scanner. The more touches, the more cost and risk.

In considering all of this, perhaps an examination of your own paper handling process may be in order. It is very possible that much of how your own organization deals with the paper you want to process and manage, falls under the category of, "Well, that's how we've always...." You may be in for an unpleasant surprise when the true picture of how expensive and fraught with peril those old habits can be. Just because this activity may take place away from the scanner room, maybe in the mail room or doc prep area, doesn't mean it isn't adding to the overall cost and risk of the process. Or it's possible you would not be surprised at all!? Perhaps you've known or suspected this but thought there was nothing that could be done... just an unfortunate cost of doing business.

Well, what if, with a non-traditional scanner and a fresh look at the process, you could eliminate or minimize the drawbacks and reduce the risk and cost of the physical component of forms processing and document management? By reducing the activity, duration and the number of times a document is touched until its scanned, what economies could your organization realize? How much more secure would your chain of custody and audited compliance be if you could kill the physical paper workflow of a document sooner, in one step... with one touch?

Wouldn't it be great if such an exceptional scanner were available? With such a tool and a fresh, innovative one touch process, the full promise and benefit of today's electronic document management and forms processing solutions, would finally become a reality... starting from where it always should have... the paper.

Wouldn't it be great...?

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