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The Care and Feeding of Your Scanning Operations
by Derrick Murphy

The television infomercial for a popular kitchen appliance tells viewers that they can "Set it and forget it!" While that claim might work for rotisserie ovens, it's a bad idea for scanning operations.

Operations require constant monitoring and evaluation to ensure that the right technologies and processes are in place to meet the organization's needs. Unfortunately, many organizations only take a hard look at their operations when problems become too large to ignore. By then, it's too late.

It's not that organizations are intentionally turning a blind eye to operational challenges. It's that most companies mistakenly believe that implementing state-of-the-art technology—whether it's software or hardware—will address their operations needs indefinitely. This thinking couldn't be farther from the truth. Like most things in business, operations requirements and dynamics always are in flux. Documents change. Staff turns over. New business rules are introduced. Technologies evolve.

For instance, there may be opportunities to add technology that has evolved since an initial install, assuming your current hardware and software supports it. You might also have an opportunity to re-engineer your operations based on technology advancements. If neither of these opportunities is available in your current systems environment, the new technology might provide the justification for an upgrade. What's more, as your documents change, you may find that your pre-configured job settings are no longer set for "peak" job performance, since they were designed for other work.

If an operation's infrastructure and processes don't adapt, its effectiveness will suffer.

Organizations must regularly analyze the technology and processes at work in their operations to identify and correct inefficiencies that may not have existed during their last system implementation. With this information, organizations can be proactive about deploying remedies, ensuring that their business case stays on track, reducing cost, and heading off potential customer service issues.

Elizabeth Herrell, an analyst with Forrester Research, notes, "By evaluating all of the elements of their operations, organizations can identify gaps and recommend changes that will eliminate those gaps and help them better meet their goals." Companies that undertake a review of their processes and technology are better equipped to align their operations with their business objectives, she adds.

This operations review should focus on **document preparation**, **operator proficiency**, and **scanner maintenance and performance**—the three areas where scanning operations most frequently falter.

Be Prepared
Document preparation is essential to the scanning process.

Adequate document preparation aids in keeping the scanners running with minimal downtime due to jams, skews, piggybacks, feeder errors or foreign items interfering with scanner functions. All staples, tape, paper clips, adhesives and other fastening devices must be removed from all documents prior to scanning. Documents must also be oriented correctly and batched in the right jobs. Without proper document preparation, operators must correct problems at scan time, which significantly reduces throughput.

By auditing its operations, one ibml customer determined that scanning its small documents individually would significantly reduce its document preparation time while increasing scanner throughput. The review also showed that the customer needed a person to back up the operator of its two scanners; the extra person, who removes documents before the feeder tray empties and conducts quick "eyeball" quality assurance tests, has helped eliminate the idle time that previously dogged the customer.

Do Your Best

Well-trained and experienced operators also are vital to the scanning process.

An operator who has been running the scanner for a period of time can pick up shortcuts that help to minimize downtime from jams and decrease the amount of time changing from one job to another. For instance, in the event of a jam, experienced operators can identify the last item scanned and pocketed correctly without having to use a jam recovery wizard. This speeds recovery times.

Conversely, it takes less experienced staff longer to recover from jams and more time to pick up and hand feed documents that need to be scanned. They are more tentative, which slows things down.

As a result of a comprehensive review of its operations, one ibml customer found that it needed to temporarily send someone from its seasoned day shift crew to its night shift to transfer knowledge. As a result, this crew member was able to get the night shift running at higher efficiency.

Leave No Trace

Scanner maintenance is absolutely critical to the scanning process.

An operation can have perfectly prepped documents and well-seasoned operators, but if maintenance is not performed properly and frequently, its scanner will not operate effectively. It is important that maintenance is performed prior to each shift. This includes cleaning the feed tires and reverse belts, making sure the ink jet cartridge is clean and sprays properly, and seeing that all sensors are clear of dust and paper debris. Operators should also record when belts and tires are changed.

Less experienced operators may forget critical steps that seasoned staff know intuitively—how to put belts on the scanner's reverse-belt assemblies or how to put tire assemblies together, for example.

Through an operations audit, an ibml customer found that operators were placing open drink containers on top of its scanners where they could spill and damage the machines. The audit also determined that the customer should move trash cans that were placed near

the scanner's pocket frame to avoid accidentally tossing dropped documents—a hazard to document integrity.

The Payoff

Conducting a regular operations audit can pay big dividends. In the case of one ibml user—a service bureau—the remedies it implemented after an audit resulted in a 60 percent increase in throughput and a 25 percent reduction in jams. Those cost-saving benefits can have a significant bottom line impact.

The key is remembering that your operations requirements won't stop changing just because you implemented new technology. In other words, don't believe everything you see on late-night TV.

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