



THE POWER OF AUTOMATED SCAN WORKFLOWS

An eBook on Simplifying Document Capture
& Increasing Productivity

EBOOK

This eBook is a reference document based on a four-part blog series, [**YSOFT SAFEQ AUTOMATED SCAN WORKFLOWS, A 4-PART SERIES ON A DIGITAL JOURNEY**](#) and other Y Soft material. It is highly recommended the reader of this eBook refer to the blog series for additional information, details on how YSoft SafeQ automated scan workflows function, connections to third party applications and repositories, recommendations and considerations for setting up automated workflows in your organization.

Additional resources are listed in this eBook for easy reference to our website where the material can be accessed.

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ABOUT Y SOFT

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INTRODUCTION

WHAT ARE AUTOMATED SCAN WORKFLOWS?

Organizations of all sizes are looking at new ways to improve productivity. This need, coupled with the digitization evolution, has driven the introduction and adoption of automated scan workflow solutions.

Automated scan workflows enable organizations to digitize traditionally paper based tasks which improves productivity. Automated scan workflows offer many more additional benefits for the employee and the organization. However, for many organizations, improving productivity is the driving factor for automated scan workflow adoption.



YSoft SafeQ scan workflows are fully integrated within all major multifunction device (MFD) brands.

INTRODUCTION

YSoft SafeQ automated scan workflows have three main phases:

CAPTURE | PROCESS | DELIVER

For each phase, this eBook outlines the steps involved and IT considerations for choosing a solution. Finally, the eBook takes a look at how using YSoft SafeQ, an IT administrator can easily create automated scan workflows for a user or groups of users in an organization.

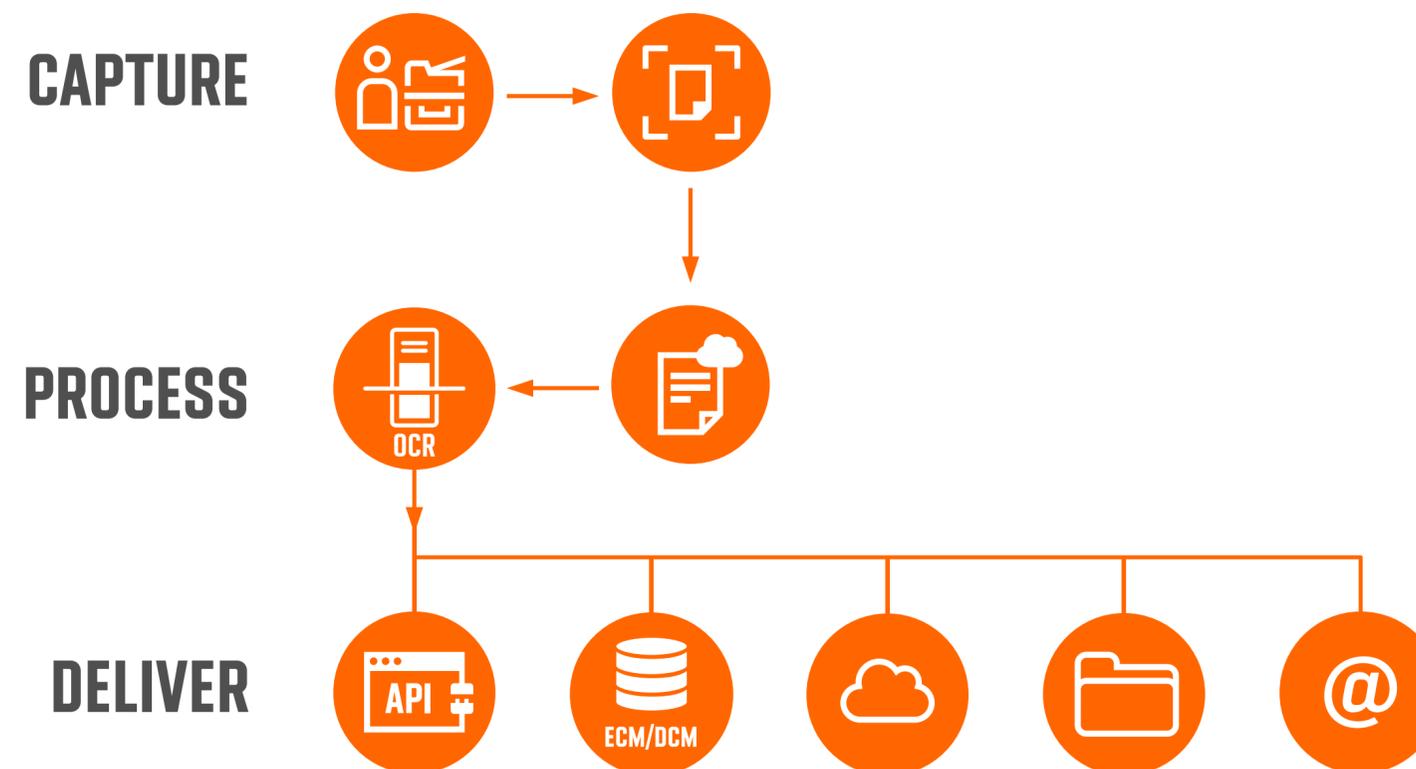


Figure 1. Phases of an automated scan workflow.

THE POWER OF SIMPLIFIED **SCAN CAPTURE**

Managing content in all its forms can be time consuming and complex, making the cost of doing business challenging and putting productivity at risk. One area where productivity can be improved is with paper based processes.

THE TRADITIONAL, INEFFICIENT WAY: **SCAN TO EMAIL**

Scan to email may seem like a quick, efficient way to capture business documents¹. However, when you consider the many steps required and potential security breaches, scan to email processes can be harmful to a business. Consider the following:

- Scan to email requires a user to carry out multiple steps. At any point, human error may occur resulting in missed steps or information being sent to the wrong person.
- From a security perspective, scan to email makes it very easy for an employee to forward to inappropriate people inside or outside the organization.

¹ Scan to email or networked shared folder is available in YSoft SafeQ and may still be a viable solution for one-off scan needs.



THE POWER OF SIMPLIFIED SCAN CAPTURE

THE DIGITAL, PRODUCTIVE WAY: SCAN CAPTURE THROUGH AUTOMATED WORKFLOWS

Simplifying scan capture with YSoft SafeQ automated scan workflows has many benefits in addition to improving productivity:

- **SIMPLE USER EXPERIENCE**
- **IMPROVED ACCURACY**
- **IMPROVED CONSISTENCY OF SCANNED DOCUMENTS**



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THE POWER OF SIMPLIFIED SCAN CAPTURE

SIMPLE USER EXPERIENCE: ONE CLICK STEP FOR THE USER

There are many parameters to consider when scanning. Will it be a color scan or black and white? Will it be a JPEG or a PDF? Will it be 300 dpi or something else? Y Soft can reduce this process to one click by predefining these decisions.

Workflow templates can be set up at both group and user level, so individuals only see the workflows they are authorized to use, making it quick, simple and secure. If the user forgets or is unsure which workflow template relates to the specific task they can view guidance notes by simply clicking on the  icon.

 **FIGURE 2.**

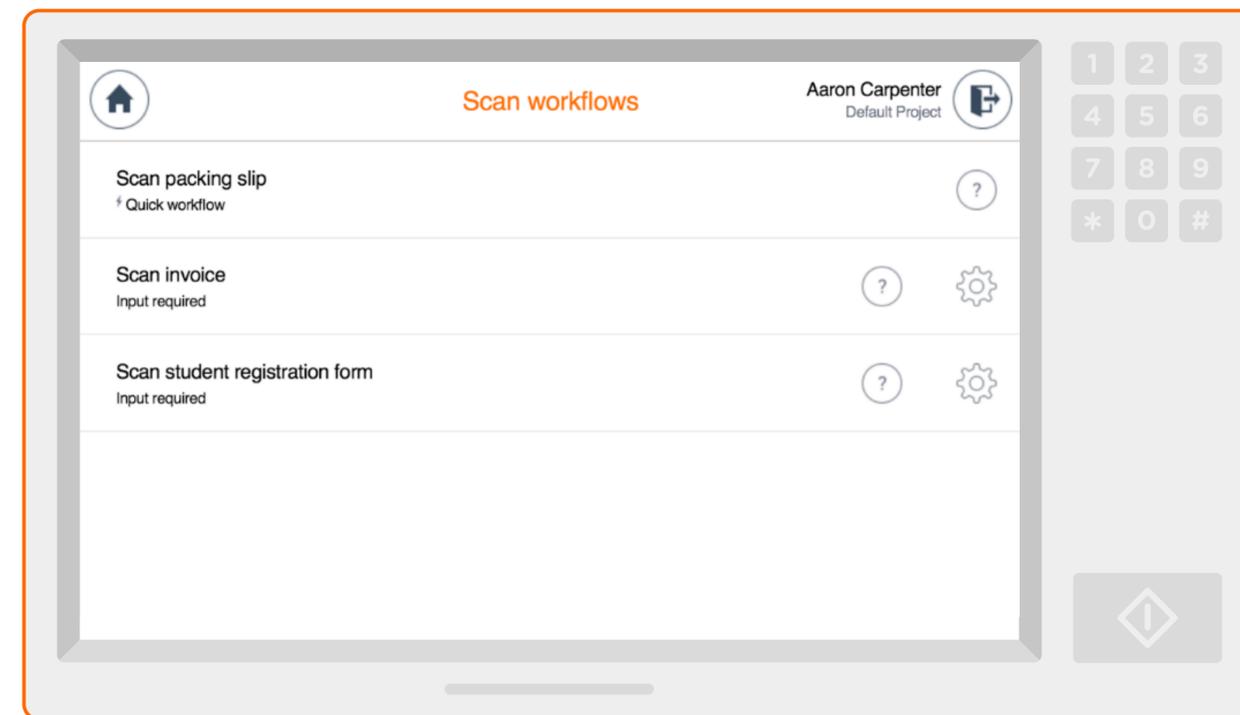
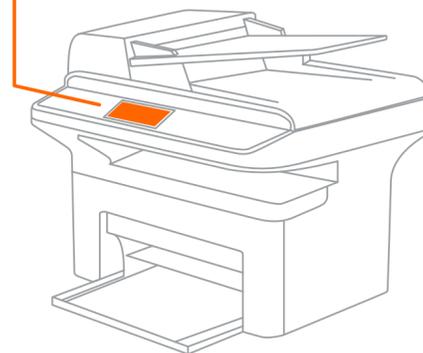


Figure 2. One click selection of a workflow on a multifunction device.



THE POWER OF SIMPLIFIED SCAN CAPTURE

IMPROVED ACCURACY

By automating the process and predefining the capture parameters within the workflow, human error (and frustration) is significantly reduced. Individual or batch scans are easily captured under the desired company-defined parameters resulting in more accurate, digital documents.

IMPROVED CONSISTENCY

Predefined capture parameters for output quality also provides consistency for the organization's digital repository.

Whereas other solutions require an organization to use a different portal or menu system, YSoft SafeQ scan workflows are fully integrated within all major multifunction device (MFD) brands which means that the user experience is consistent across the organization.

[WANT TO FIND OUT MORE? READ THE FULL ARTICLE.](#)

AIDING REGULATED INDUSTRIES:

Automated scan workflows can aid in eliminating human error helping organizations meet compliance requirements.

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THE POWER OF ENHANCED DOCUMENT CAPTURE PROCESSING

POWERFUL PROCESSING

Many document capture software solutions create an image; there is little processing and the quality of the image can be poor. Automated scan workflows provide organizations with a **solution that creates high quality, usable documents.**

CONSISTENT, SECURE DOCUMENT PROCESSING AUTOMATICALLY APPLIED

Often, manual document capture can result in low quality images. Elements may be blurred and difficult to read so the user may have to scan the document repeatedly to achieve an acceptable result.



THE POWER OF ENHANCED DOCUMENT CAPTURE PROCESSING

With YSoft SafeQ automated scan workflow processing, the **document is optimized to ensure the highest quality output:**

- if a page is placed onto the scanner glass at an angle, the **orientation will be autocorrected.**
- if there are any disruptions to the image i.e. dust, fingerprints on the scanner glass, **the image is automatically cleaned** during processing.
- if you need to append or prepend pages they can be **automatically merged** or blank pages can be **removed.**

Security is a key requirement so **processing is completely secure** and managed at the backend to provide complete peace of mind without impacting user experience. Confidential documents can be further secured by setting the digital output as a password protected PDF.

THE POWER OF ENHANCED DOCUMENT CAPTURE PROCESSING

EDITABLE, SEARCHABLE DOCUMENTS: SAVING TIME AND EFFORT

Digital document output is available in a variety of formats to enable both long term archiving and making the document keyword searchable and editable.

The ability to search for a document using keywords adds significant value in terms of saving employees' time.

CONSISTENT AND EASY FILE NAMING

The automated scan workflow can be designed so that the resulting digital file is automatically named. This is important for consistency purposes and aids in finding the right files quickly.

A workflow can define how files are named and use highlighted text as part of the filename structure.

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THE POWER OF ENHANCED DOCUMENT CAPTURE PROCESSING

For organizations that use barcodes on documents, the workflow can be designed to use content found in a barcode as the file name. Alternatively, the user can add this data manually at the MFD.

The screenshot displays the 'Scan workflows > Workflows > New' configuration page in the YSoft SafeQ Administrator. The interface includes a left sidebar with navigation options: Dashboard, Reports, Devices, Billing, Users, Rules, Scan workflows (selected), and System. The main content area is titled 'Workflows' and 'Connectors', with a 'Back to Workflows' link. The configuration is divided into several sections: 'General' (Name: Lab test results, Description: Lab test results - ensure a barcode is present in the document), 'Destination' (Destination: Local disk, Target directory: C:\ Lab Test Results%\%barcode%), and 'Processing' (1D Barcode: enabled, Barcode type: Any 1D barcode). A note below the barcode type dropdown states: 'You can access the barcode value with %barcode% variable.' A right-hand sidebar contains a list of tabs: General (selected), Destination, Processing, Output, Scan settings, User input fields, and Access. The top right corner shows the user 'YSoft SafeQ Administrator admin' and a notification icon.

Figure 3. Creating a workflow that uses barcodes.

THE POWER OF ENHANCED DOCUMENT CAPTURE PROCESSING

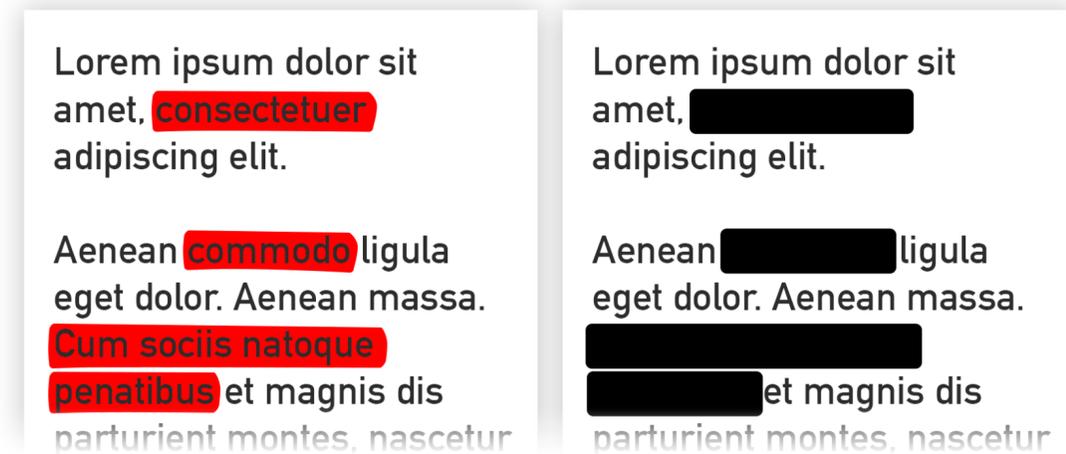
ENSURING COMPLETE CONFIDENTIALITY: TEXT REDACTION

Highlighting text can be used to redact sensitive or confidential data that the user does not want, or is not authorized to share. The user can highlight the sections in another color, perhaps defined in the workflow as red. YSoft SafeQ ensures that all red words are redacted,  **FIGURE 4**.

The redacted text cannot be seen or surfaced when keyword searching thereby ensuring complete confidentiality of any sensitive data.

[WANT TO FIND OUT MORE? READ THE FULL ARTICLE.](#) 

REDACTION



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Figure 4. Document before and after redaction, using a highlighter.

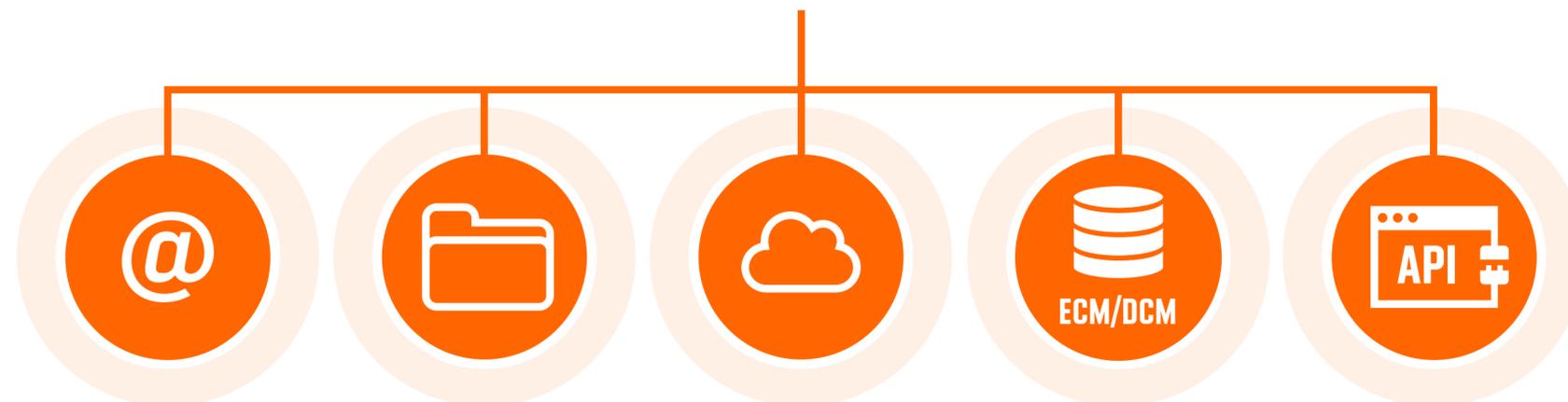
SIMPLE, SWIFT, SECURE DELIVERY

The delivery stage of scanning can be the most time consuming for the user and where costly mistakes are easily made: forgetting to post a copy of the scan; posting it in an incorrect location where sensitive information is exposed.

PREDETERMINED LOCATIONS

With YSoft SafeQ, automated scan workflows **define the delivery location of scans** so that scans are instantly and securely sent to the right place every time.

The user simply selects the desired workflow from the list of their authorized workflows on the MFD and scans the document; everything else is automatically managed for them, including notifying recipients that the document is available.



SIMPLE, SWIFT, SECURE DELIVERY

CONTROL AND FLEXIBILITY OF SHARED LOCATIONS

Scan to email is considered less secure than saving to a secure, shared location; **secure, shared locations are fast becoming best practice for document capture**. A secure, shared location can be an on-premise file server or ECM (electronic content management), DMS (document management system), a line of business application or a third-party cloud application.

With connectors to these third-party applications, users do not have to login to the repositories or applications to have the scans delivered.

YSOFT SAFEQ CONNECTOR LIBRARY

An ongoing library of free and for-purchase connectors to popular ECM/DMS, line of business applications or cloud repositories.

[VIEW THE LIBRARY OF AVAILABLE CONNECTORS.](#)

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SIMPLE, SWIFT, SECURE DELIVERY

SECURE DELIVERY VIA ENCRYPTION

Security is a growing concern and it is imperative that businesses protect their data and that of their customers and partners. The most effective way to protect your business scans is through **secure, automated delivery**.

With YSoft SafeQ scan workflows, encryption is managed in the back end and does not impact user experience. You have complete peace of mind that your **documents are delivered securely and can only be viewed by your authorized users**.



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SIMPLE, SWIFT, SECURE DELIVERY

COMPLETE AUDIT TRAIL VIA REPORTING

Auditing is a huge task for any organization to undertake. So, automating discovery and tracking through reporting is **essential in protecting your business** and remaining in accordance with industry regulations without having to incur vast costs.

YSoft SafeQ scan workflows provide you with complete insight into document capture activity. Reporting includes information on who is scanning, what devices are being used, when scans took place and where scans were delivered. The reports can be filtered in a variety of ways to show most active users, devices and by date ranges with detailed audit logs.

[**WANT TO FIND OUT MORE? READ THE FULL ARTICLE.**](#) 

According to Manufacturers Alliance for Productivity and Innovation, between **1981 and 2012 an estimated 2,183 unique regulations have been promulgated**, within U.S. manufacturing alone. And for global businesses, the complexity magnifies exponentially.

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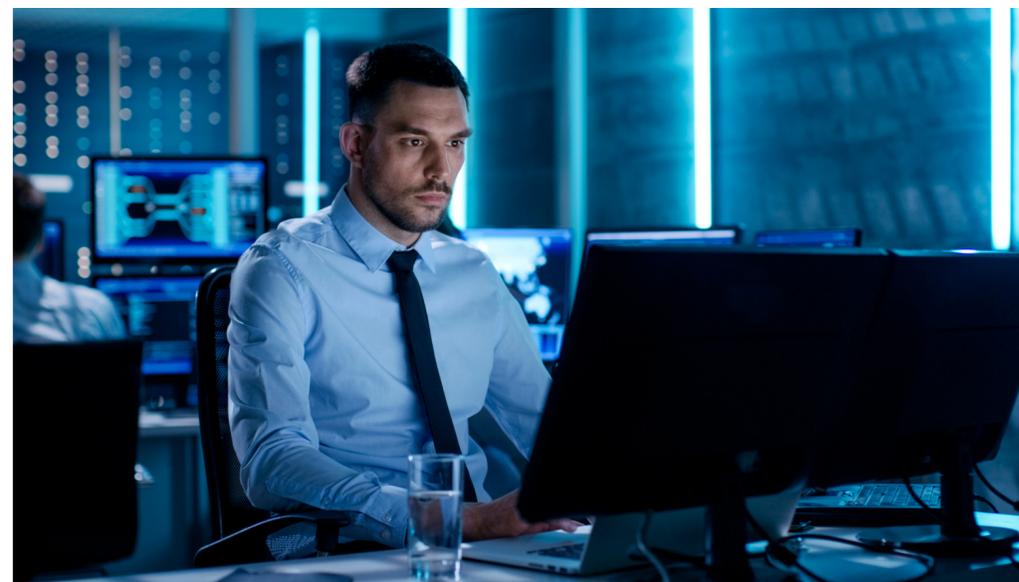
CREATING POWERFUL AUTOMATED SCAN WORKFLOWS

As an IT administrator, finding solutions that support your organization's strategic goals, such as improving employee productivity and security can be immensely valuable. **Automated scan workflows help you to contribute to your company's digital objectives.**

Now that we've covered how YSoft SafeQ scan workflows can capture, process and securely delivery scans, this section looks at how automated scan workflows are created...hint: it's easy!

FOLLOW THE FLOW

YSoft SafeQ automated workflows follow three main phases: **Capture**, **Process** and **Deliver**. For IT administrators, creating a workflow uses the same phases but in reverse order and adds one phase at the end: **defining who can access the workflow.**

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CREATING POWERFUL AUTOMATED SCAN WORKFLOWS

DELIVER

When creating your first workflow, you'll need to define the destination for the digital document first. Later, when you create more workflows, you can use the same destination if appropriate or define new ones.

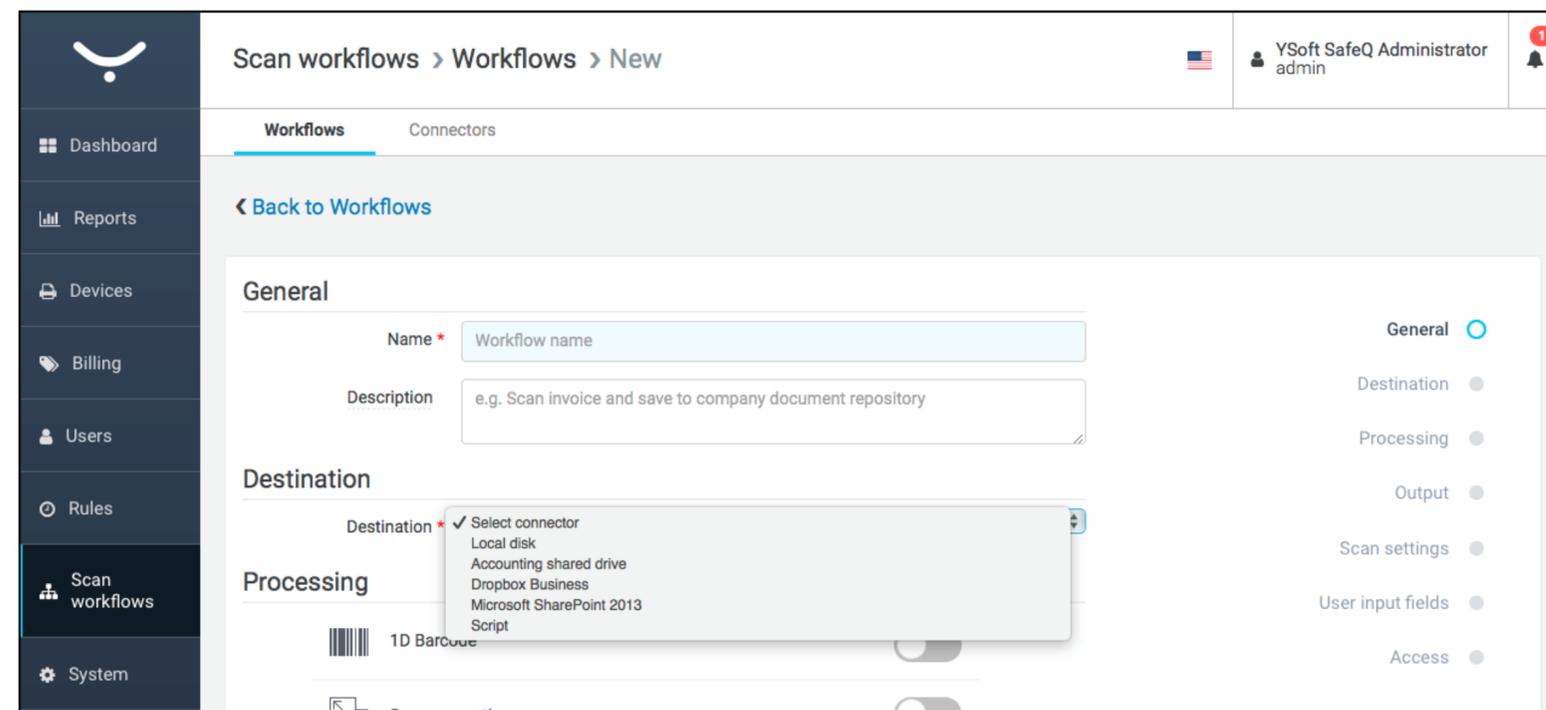


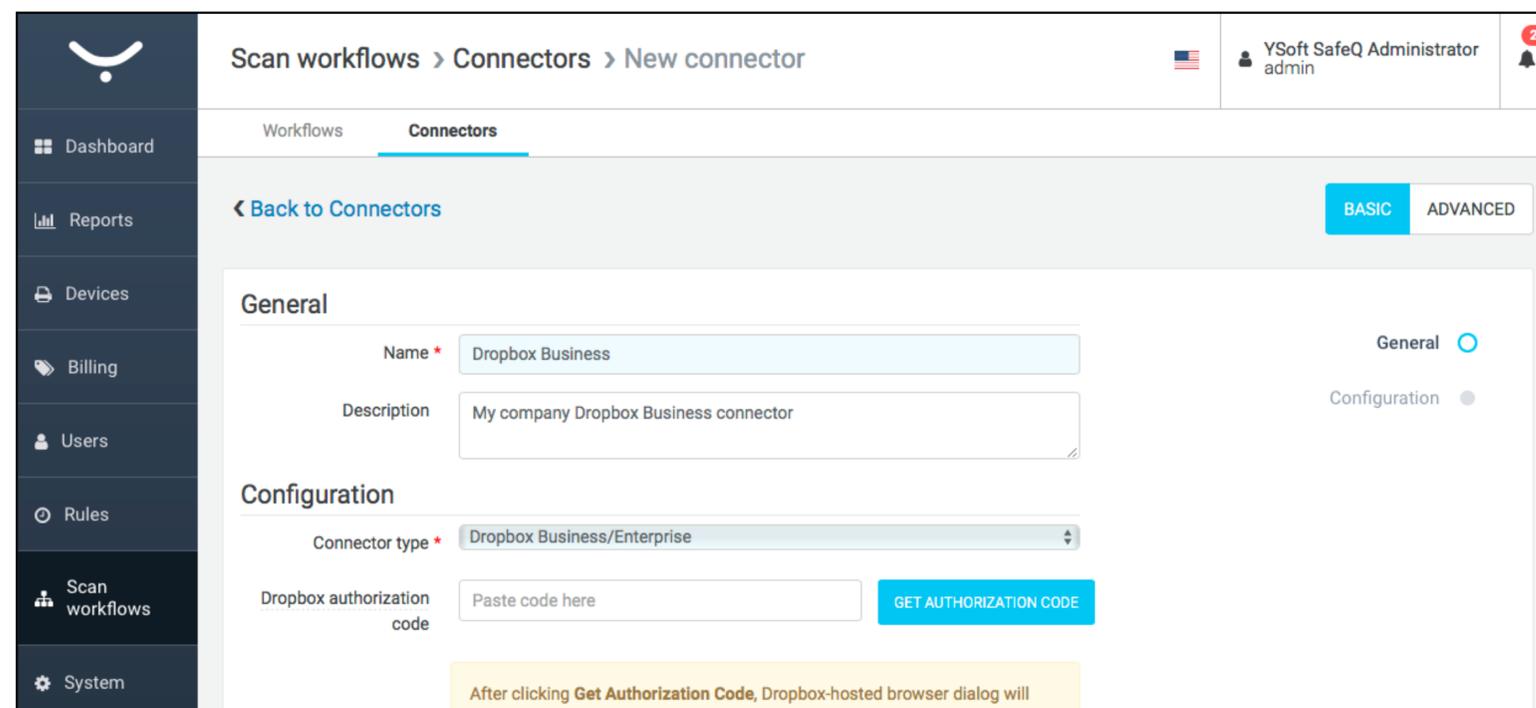
Figure 5. Defining workflow destination.

CREATING POWERFUL AUTOMATED SCAN WORKFLOWS

CHOOSE YOUR DESTINATION

The destination for the workflow could be a network folder, a cloud document repository, an on-premise document management system or an industry ERP solution.

YSoft SafeQ automated scan workflows offer single sign-on to third party repositories. For example, if your workflow destination is Dropbox Business account, authorized users of the workflow do not have to worry about signing in to Dropbox on the MFD – scanned documents will be delivered under the authorized user's credentials. The workflow settings take care of it through YSoft SafeQ connectors. In [FIGURE 6](#), we use Dropbox as an example.



The screenshot displays the 'New connector' configuration page in the YSoft SafeQ interface. The breadcrumb navigation shows 'Scan workflows > Connectors > New connector'. The user is identified as 'YSoft SafeQ Administrator admin'. The page is divided into 'Workflows' and 'Connectors' tabs, with 'Connectors' selected. A 'Back to Connectors' link is visible. The form is split into 'General' and 'Configuration' sections. In the 'General' section, the 'Name' field is filled with 'Dropbox Business' and the 'Description' field contains 'My company Dropbox Business connector'. In the 'Configuration' section, the 'Connector type' is set to 'Dropbox Business/Enterprise'. Below this, there is a 'Dropbox authorization code' field with the placeholder text 'Paste code here' and a blue 'GET AUTHORIZATION CODE' button. A yellow tooltip at the bottom of the form states: 'After clicking Get Authorization Code, Dropbox-hosted browser dialog will'. On the right side of the form, there are radio buttons for 'General' (selected) and 'Configuration'.

Figure 6. Creating a connector for Dropbox.

CREATING POWERFUL AUTOMATED SCAN WORKFLOWS

CAPTURE AND PROCESSING SETTINGS

Capture and processing parameters are configured in one step-by-step screen. Start by giving your workflow a name and description. The description is visible to users who have access to the workflow; it lets them know what the workflow does typically. For example, scan invoices to Dropbox.

Choose the destination where the scan will automatically be delivered, such as Dropbox Business. Document capture (scan) parameters, including document color, e.g. black and white, document format, e.g. JPEG or PDF, and image quality, e.g. 300 dpi, and any more advanced processing steps you need are defined.

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CREATING POWERFUL AUTOMATED SCAN WORKFLOWS

These include:

- **BARCODE RECOGNITION:**
Use the barcode information to pre-define parameters, such as file naming.
- **OPTICAL CHARACTER RECOGNITION (OCR):**
Converts the scanned document into a format that can be edited and keyword searched, making it easier to find in the future. Settings for removing blank pages, cleaning the document by removing smudges or correction orientation issues can be defined.
- **HIGHLIGHTER EXTRACTION:**
Allow users to mark text in a paper document using a highlighter pen of a defined color and then use the marked text, for example, to name the resulting file or determine the folder location in the destination.
- **HIGHLIGHTER REDACTION:**
Confidential documents with sensitive information can be highlighted with a highlighter pen of a defined color to mark the desired words on the paper document. The resulting digital file will have the words redacted and, additionally, these words are not keyword searchable.

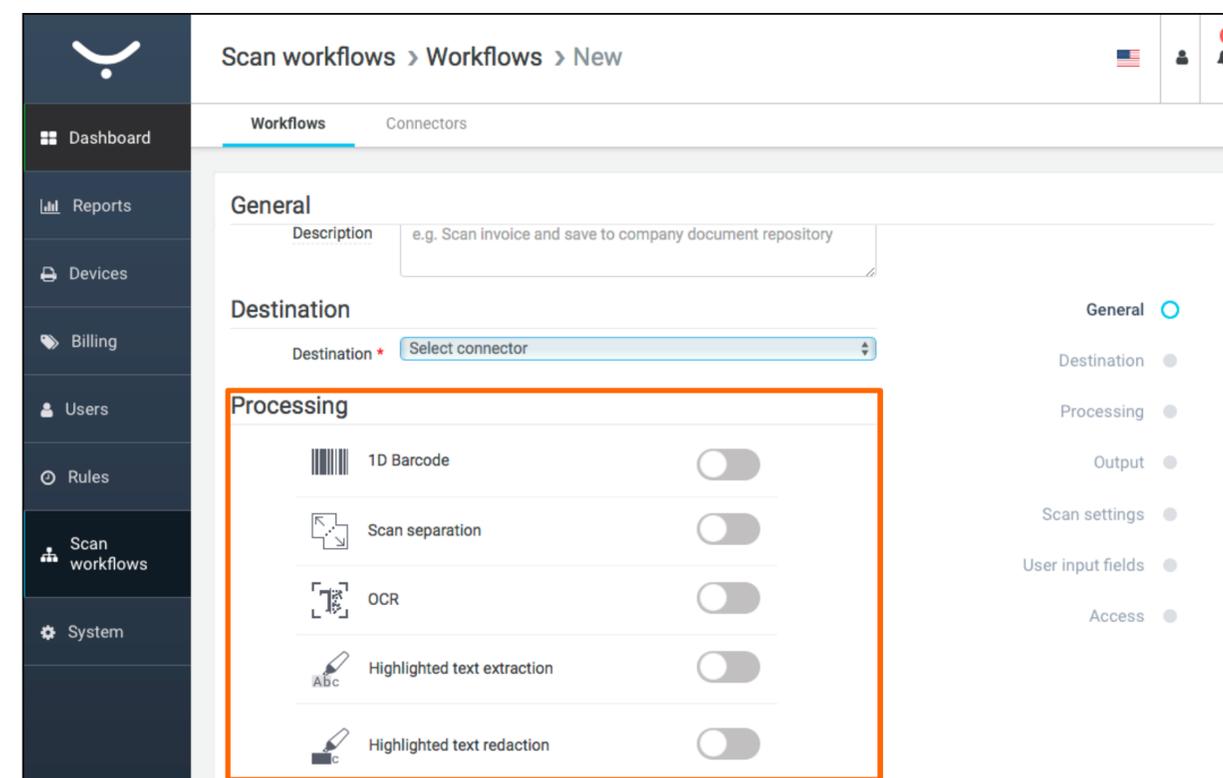


Figure 13. Configuring workflow advanced processing steps.

CREATING POWERFUL AUTOMATED SCAN WORKFLOWS

ASSIGN USERS

Assigning users access to workflows ensures that only authorized users can send digital documents to the destinations defined in the workflow via the MFD. Assign a workflow to an individual, a group of users or all users at a particular branch office by creating roles in YSoft SafeQ. It is important to note that using Active Directory replication allows you to import roles from Active Directory, removing a manual step and saving you time.

That's it.



CREATING POWERFUL AUTOMATED SCAN WORKFLOWS

REDUCING COMPLEXITY FOR IT ADMINS

Unlike other document capture (scan) solutions, Y Soft automates many of the functions for IT administrators. Administrators can create and control all scan workflows across the organization.

Here are the additional advantages for IT admins:



- **FAMILIAR INTERFACE:**

The simple web interface is standardized across the Y Soft product portfolio. This makes creating workflows an easier task if you are already a Y Soft customer.

- **REPORTING & AUDITING:**

Setting up reports and monitoring/troubleshooting use of automated scan workflows is easy. Reports can be accessed by authorized individuals or groups so your IT team doesn't have to spend time managing statistics and usage monitoring and management.

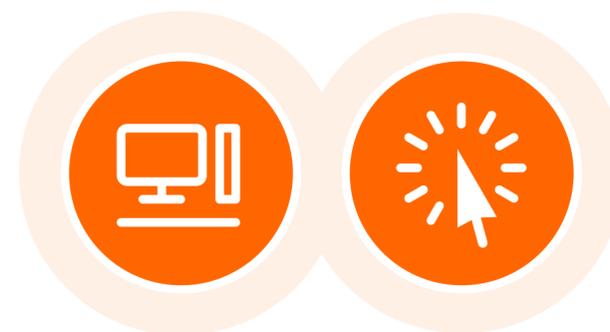
- **REDUCING ONGOING WORKFLOW MANAGEMENT:**

Easily set up or change pre-defined workflows across your MFD fleet, as opposed to having to implement the same workflow or change multiple times for each MFD.

[WANT TO FIND OUT MORE? READ THE FULL ARTICLE.](#) 

ADDITIONAL RESOURCES

- Four-part blog series, YSoft SafeQ Automated Scan Workflows, a 4-part series on a Digital Journey
 - Part 1: [THE POWER OF SIMPLIFIED SCAN CAPTURE](#)
 - Part 2: [THE POWER OF ENHANCED DOCUMENT CAPTURE PROCESSING](#)
 - Part 3: [THE POWER OF SIMPLE, SWIFT AND SECURE DELIVERY](#)
 - Part 4: [CREATING POWERFUL AUTOMATED SCAN WORKFLOWS](#)
- [SCAN WORKFLOW USE CASES](#) – examples of paper based processes that can be automated.
- [YSOFT SAFEQ OCR LANGUAGE SUPPORT](#)
- [YSOFT SAFEQ AUTOMATED SCAN WORKFLOWS WHITE PAPER](#)
- [YSOFT SAFEQ AUTOMATED SCAN WORKFLOWS VIDEO ON KONICA MINOLTA DEVICES](#)
- [YSOFT SAFEQ AUTOMATED SCAN WORKFLOWS VIDEO ON XEROX DEVICES](#)



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YSOFT SAFEQ MANAGED WORKFLOWS

In this eBook, we have shared how automated scan workflows help improve productivity, consistency, accuracy and security at every stage of the scanning process. In YSoft SafeQ, automated scan workflows are offered in the Managed Workflows modules which can be found in two of YSoft SafeQ product suites:

[YSOFT SAFEQ WORKFLOW SUITE](#)

[YSOFT SAFEQ ENTERPRISE SUITE](#)

(includes YSoft SafeQ Workflow Suite + Print Management)

Y Soft offers Managed Workflows in two modules so organizations only pay for features they need:

CORE WORKFLOWS

With Core Workflows, documents are scanned with basic processing and formatting, barcode recognition and delivery to several types of destinations. Destinations include scan to email, scan to a shared network folder, scan to script for customized destinations and scan to pre-defined, 3rd party destinations using YSoft SafeQ Connectors.

ADVANCED WORKFLOWS

When more sophisticated processing and formatting is required, Advanced Workflows meets the challenge with robust processing including OCR (Optical Character Recognition), searchable text and editable file formats as well as output to secure PDF. Core Workflows is a prerequisite for the Advanced Workflow module.



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INTELLIGENT ENTERPRISE OFFICE SOLUTIONS THAT **BUILD SMART BUSINESS**

We create intelligent enterprise office solutions that build smart business and empower employees to be more productive and creative. We are headquartered in the Czech Republic and employ over 300 people in seventeen offices around the world; our R&D centers are in Brno and Prague, Czech Republic.

Through YSoft Labs, we experiment with new technologies for potential new products. We accelerate the technology growth of other innovative companies through Y Soft Ventures, our in-house investment arm. We also contribute our time, talent and resources to universities and tech forums.

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