

Bay Area Insurance

Bay Area Insurance reduces monthly document imaging times from 24 to 8 hours



Business overview

Established in 1981, Bay Area Insurance Agency is a Maryland-based independent insurance agency that provides commercial, personal, and life/health insurance for businesses and individuals.

Challenges

Bay Area Insurance had purchased document imaging software to capture customer files. Although the software was integrated with the company's customer database, it did not permit the scanning of documents to specific accounting folders. Bay Area Insurance sought a solution that would automate the processing of accounts payable, accounts receivable, and licensing administration documents.

EMC solution

The company purchased a Xerox scanner that included a demo version of EMC[®] Captiva[®] QuickScan[™] Pro. After working with the demo version, employees were very impressed with the capabilities of QuickScan Pro, but found that several additional features were only available by upgrading to the full version. Bay Area Insurance opted to purchase the complete QuickScan Pro document imaging solution.

QuickScan Pro is an out-of-the-box imaging solution built within the ISIS[®] architecture—the industry-standard interface technology that unites scanners with software applications. QuickScan Pro provides high-speed scanning, image enhancement, optical character recognition (OCR), viewing, annotation, printing, and storing of images for both black-and white and color pages. The solution supports barcode and patch code recognition for automatic document separation, as well as advanced scanner features such as MultiStream and automatic color detection.

QuickScan Pro gave Bay Area Insurance the flexibility to create barcodes for each accounting function. As a result, the company can batch all documents for each function and then scan the entire batch at the end of each day. Using QuickScan Pro, Bay Area Insurance users can scan batches of documents and then automatically view separated documents and manipulate files before exporting them to popular file formats.

Summary

"QuickScan Pro's batch scanning function, combined with the duplex scanning capability of the Xerox scanner, has saved us a tremendous amount of time each month," said Michelle Schoff, financial administrator at Bay Area Insurance Agency.

Prior to using QuickScan Pro, scanning accounting records consumed approximately 24 hours each month. QuickScan Pro has reduced that time to just 8 hours per month. The hours saved are now being spent in more productive areas.

In addition, employees can quickly and easily retrieve documents. Several of the company's accounting employees work from home a few days each week. Now, all documents are available to them in a digital format by simply accessing the company server. And staff members no longer need to carry heavy stacks of files back and forth each day.

Bay Area Insurance uses QuickScan Pro in its accounting department to manage the processing of documents for accounts payable, accounts receivable, and licensing administration. All administrative aspects of the organization have been automated, which has resulted in streamlined business processes, time savings, improved access to information, and greater employee satisfaction.

“QuickScan Pro’s batch scanning function, combined with the duplex scanning capability of the Xerox scanner, has saved us a tremendous amount of time each month.”

Michelle Schoff, Financial Administrator, Bay Area Insurance Agency

QuickScan Pro is ideal for the needs of Bay Area Insurance; it replaces a time-consuming and error-prone process of manually managing paperwork with a complete document imaging solution capable of handling thousands of documents. With QuickScan, Pro, Bay Area Insurance users are able to process documents more efficiently and reduce or eliminate the storage and filing costs associated with maintaining hard copy versions of the documents.



EMC Corporation
Hopkinton
Massachusetts
01748-9103
1-508-435-1000
In North America 1-866-464-7381
www.EMC.com