



Goodbye 2020, Welcome 2021!

A panel of experts share the most significant opportunities for growth in 2021.



There are few who will be sad to see the calendar roll over to 2021. While the year changing won't solve any problems, it's a symbolic change that brings with it hope for better times — safer, "normal," and prosperous. Judging by the responses to our end-of-year editorial outreach, most industry insiders are hopeful about 2021 and expect good things to come for our industry.

SCAN:DCR: What are the biggest opportunities facing data capture solution providers in 2021?

Elizabeth Sinclair, Director of Marketing, BarTender by Seagull Scientific: It's a time of dynamic change in the supply chain — The COVID-19 pandemic has been transformative: online shopping has accelerated to an unexpected and stratospheric rate; stresses to the supply chain have made companies rethink just-in-time, offshore and lean manufacturing; and consumers have shifted brand loyalty, choosing what's available over what they're accustomed to — and they expect to be able to order and receive products the same day, if

not within the hour.

We need to reexamine the way we think about our technologies and how we market. During times of economic downturn, such as the 2008 recession and today's global pandemic, companies look to invest in automation technologies, taking the opportunity of the slower-paced business environment to reassess systems, and plan for and invest in the future.

AI and robotics are sexy, but companies are looking especially to upgrade processes and leverage the power of existing technologies like RFID and barcoding — including optimizing their investment in enterprise labeling.

Doug Niemeyer, General Manager, TEKLYNX: The most significant opportunities facing data capture solution providers in 2021 revolve around the global market need to do more with less. Organizations across industries are looking to reduce errors and increase efficiency in

their processes and implement solutions that withstand unexpected events. Cloud-hosted technologies and smart device communication will streamline processes and help to support this need.

An integral piece of the solution discussion is now, “will this be hosted locally or in the cloud?” A label printing solution in the cloud allows users to print labels with the correct data from anywhere in the world, eliminating manual interaction while simultaneously making an environment leaner. A cloud-hosted label printing interface removes the stress of local installations, server maintenance, and software upgrades. Cloud hosting allows the user to rapidly enable on-demand label printing at new locations with maximum scalability while also centralizing control of label printing at multiple locations. Integrations like these allow for a more streamlined process that removes errors and saves companies money.

Smart device communication allows data to automatically drive label printing, removing manual steps that could produce inaccurate labels resulting in detrimental consequences. Scanning a barcode to select the correct label template, using a scanner to look up the correct database record, or sending weight data directly from a scale to a when printed variable on a label are all integrations to aid in machine-to-machine communication.

Rob Armstrong, Vice President of Portfolio Marketing at Zebra Technologies: Our recently issued 13th annual Global Shopper Study found that the pandemic accelerated technology spending plans for 60% of surveyed retailers. We’re seeing more retailers rapidly adapt and evolve their operations to meet changing consumer habits as safety and convenience trends like curbside delivery and buy-online-pickup-in-store (BOPIS) gain momentum.

These services will remain popular even after the pandemic is behind us, presenting an expanded opportunity for inventory management, workforce management and task management solutions. Data capture solutions like mobile computers, tablets and label printers help make curbside delivery and BOPIS a reality. RFID will continue to help reduce out-of-stock items and enable better localized fulfillment and inventory visibility. Leveraging prescriptive analytics capabilities, workforce management and task management software solutions will direct associates to perform the best next action based on what is happening in the store at that point in time.

Food safety is another great opportunity for data capture solution providers. Now more than ever, consumers want full transparency about their food – how it was grown, what’s in it and where it shipped from before it arrived at their grocery store.

Our Food Safety Supply Chain Vision Study found that technology in the food supply chain is key to delivering on consumer expectations for transparency, which is needed to



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inspire greater consumer trust and enable improved food supply chain operations. Ninety-three percent of food and beverage industry decision-makers plan on increasing investments in food monitoring technology. Interestingly, 41% of industry decision-makers say that RFID tags improve traceability more than any other technology, yet only 31% currently use them.

Other emerging technologies that are likely to gain traction include temperature-sensitive labels, blockchain and predictive analytics.

SCAN:DCR: What will our industry's biggest challenge be in 2021?

Niemeyer: With many challenges come many solutions, and 2020 provided both. Pivoting to align with challenges was one of the more challenging lessons learned in 2020, but the COVID-19 pandemic helped shape the future of modern manufacturing and remote work processes into 2021 and beyond. The biggest challenge entering 2021 will be continuing to gain efficiencies while remaining resilient.

Having an efficient process paves the road for success now and into the future, as inefficient systems make room for errors as well as wasted time and money. Overcoming inefficiencies includes implementing solution-based systems that let technology do the talking. Integrations that remove manual steps, print automation that eliminates the need for manual data entry, and scalable solutions to respond quickly to spikes in demands are all tools built to help companies succeed for the long haul.

Businesses in 2021 must place a stronger focus on resilient supply chains powered by adaptable software solutions. Printing labels on-demand allows last-minute changes to be made and ensures resources are never wasted. Instituting an automated label approval process provides the infrastructure to make changes accurately, avoiding costly mistakes. Knowing exactly who is responsible for updating label templates and who is responsible for approving said updates means labeling isn't a bottleneck when changes are needed. Remaining aware of current challenges and educating on solutions available to help overcome can help businesses of all complexities persevere.

SCAN:DCR: What technology or service do you think will have the most significant impact on end customers in the next few years?

Sinclair: GS1's Digital Link standard for web-enabled barcodes was launched last February and is experiencing rapid adoption. Digital Link URLs can

be accessed through the scanner on a smartphone, and in some cases via an app.

GS1 says: "Similar to the way a web address (i.e., URL) points to a specific website, GS1 Digital Link enables connections to all types of business-to-business and business-to-consumer information. And instead of being limited to one type of data carrier like a traditional barcode, brands can now use a QR code, radio-frequency identification (RFID), GS1 DataMatrix tag or near-field communication (NFC) to deliver this information to their customers."

The power of GS1 Digital Link is that the data returned to end user is contextual — it's a dynamic code that delivers different data to the user, depending on things like which app was used to access the information, the user location, time zone, demographics or a campaign. By scanning one single Digital Link code, a consumer could access a recipe or nutrition information, a retailer could see a calendar for item promotions and store planograms for that item, and a logistics provider could learn the product's handling information and track its journey through the supply chain.

For example, a consumer scanning a box of rice would likely see provenance, nutrition and ingredient information, but they might also see a recipe or a coupon for a discounted price. An Australian consumer would see the recipe in metric system measures and the coupon in Australian dollars, while an American consumer would be delivered content in English measures and US dollars.

A retailer scanning the same code would see things like lot number, a calendar for discounts and promotions on the product, maybe even planograms to display the boxes of rice in an effective, brand-approved manner.

A logistics provider or warehouse could scan that very same code and access handling information or hazard information (although rice isn't terribly hazardous, many CPGs, like cleaning products, have the potential to be).

And since Digital Link can also hold a product's UPC information. GS1 anticipates a new era of just one data-carrying code on a package: Digital Link will eventually displace the on-pack UPC code.

Niemeyer: This past year has provided many challenges, but companies worldwide have taken advantage of the opportunities and resolved issues with solutions to boost our new normal and make processes more efficient than ever before.

A common theme in industries across the board is producing greater value out of fewer resources, saving money and reducing manual touch points.

In the next few years, business system integration and label printing automation technology will significantly impact customers to achieve new levels of efficiency. Label printing automation software in the cloud allows businesses to populate variable data onto label templates at print time, eliminating unnecessary steps. Utilizing smart label templates that leverage database connections to pull data onto labels automatically reduces waste across the board. Labeling integrations automatically trigger label print jobs from a business system, eliminating the need to manually open label files, update them and select the correct printer and quantity to print. Integrations that are working to make a process leaner and more efficient have a tremendous effect on end-users and continues to evolve year after year.

Armstrong: The global pandemic transformed virtually every industry. This transformation drove a critical need to automate workflows in 2020 to satisfy customer demand while also driving efficiency and productivity. To accelerate the digital transformation needed to keep up with the shifting market changes, automation will take center stage across markets as companies augment their human workers with solutions that automate the sensing of data and manual tasks, leaving human workers to focus on higher value tasks. Solutions that are growing in popularity in this area include RFID, machine vision, and decision automation driven by machine learning (ML) and artificial intelligence. Solution providers that can serve as trusted advisors for these types of solutions will be well-positioned for future success.

In this increasingly automated world, it will be essential that businesses develop a central point of orchestration of disparate devices, sensors and automation platforms. Creating synergy across the value chain will ensure a successful transformation – where human workers are critical for high-value tasks and augmented by automation systems to achieve the highest levels of productivity and quality.

SCAN:DCR: What complementary technologies or services should solution providers be offering customers in 2021?

Armstrong: Decision automation capabilities will be critical to help automate labor and inventory planning. Retailers can collect data from sources such as shelf-edge cameras, incoming orders,

current store and nearby store inventory, and in-store customer load. After the data has been collected, the decision automation capability solution analyzes the information to decide what tasks need to be done in real-time. Retailers have long been using analytics software, but most of it looked at historical data and reports. Today, retailers want more actionable data. Prescriptive analytics leverages real-time data and makes it actionable by recognizing patterns and identifying when abnormal behaviors occur. Being able to detect these patterns in advance can help retailers avoid errors and inefficiencies as well as proactively improve operational outcomes. This shift from responding reactively to inventory shortages or other issues and moving toward actionable intelligence is really driving change for retailers today. Offering solutions and services that help drive this shift will be important as customers advance their operations in 2021.

SCAN:DCR: Which vertical(s) hold the most significant opportunity in 2021?

Sinclair: We've been talking about the Food Safety Modernization Act (FSMA) for a long time (since 2011!), but now that US FDA is ushering in their "New Era of Food Safety," they've really nailed down the traceability requirements with FSMA section 204, introduced in September 2020.

Section 204 requires, among other things, that a company be able to provide upstream data for every product that comes into a facility and downstream data for every product that leaves within 24 hours of a recall or other request from FDA.

If the food supply chain were binary, ingredients coming from one source and going into just one finished product going into only product, manual, spreadsheet-based traceability would work well. But one lot of Atlantic pollack might be commingled with other catches, destined to go to Japan for surimi, Norway for cat food, Canada for processing into frozen meals. This goes beyond production to cold chain, logistics providers, warehouses and even retailers. Everyone is going to have to be able to ID where things came from and where they went. It's not just FDA that's driving this, it's consumers. AIDC technology is going to be what drives the process.

The food industry tends to be smaller, more fragmented than the other regulated industries. Many organizations still run on manual processes. They're scrambling for help in meeting this new set of traceability regulations. The AIDC industry can reach out with the assurance that we've done

this before, helping the pharma and medical device industries comply with similar traceability initiatives.

Armstrong: The impact of COVID-19 has accelerated digital transformation across markets and we anticipate this continuing in 2021. Within retail, growth in e-commerce will continue to accelerate retail sales and innovation as companies look for new ways to manage consumer demands and alternative fulfillment and delivery options. According to Planet Retail, 2020 has been an inflection point for e-commerce, which is now projected to globally account for 28% of chain retail sales. This is forcing retailers to quickly adapt and automate their stores, fulfillment centers and logistics workflows. Automation, including robotics and the use of mobile computing and wearable technologies, will continue to be prioritized. Retailers were already increasing their spend on automation in 2020 and will continue to embrace this technology in 2021 to augment human workers' productivity and better equip them to operate in a partially automated environment.

Conversations about COVID-19 vaccine distribution have spotlighted pharmaceutical manufacturing and transportation and logistics as pharmaceutical companies and governments worldwide prioritize the safe and effective distribution of vaccines. The cold chain management of COVID-19 vaccines is a matter of public health. COVID-19 vaccine candidates range in stability profiles from ultra-frozen to frozen to refrigerated. Managing these profiles is critical to maintaining approved vaccines' efficacy from manufacture to administration in this unprecedented distribution effort. Deploying appropriate vial-level temperature traceability across the immunization supply chain is necessary to ensure effective handling and delivery of vaccines to those who elect vaccination.

SCAN:DCR: What was the most impactful announcement your company made in 2020? What can we expect to see in 2021?

Sinclair: We launched BarTender 2021, a future-facing version of our product. It's full of new features that will enable companies to be more productive and reduce complexities. It includes a browser-based interface for printing from anywhere in the world, there's an Internet connection, and from any device or operating system – PC, tablet, iOS, Windows, Android. We've also added configurable workflows that are built using a WYSIWYG, visual drag-and-drop interface, and the best color support available, including a new color

picker interface and the PANTONE palette.

We have exciting, ground-breaking new things in development for the coming year, but you'll have to stay tuned to learn about them.

Armstrong: In January, we introduced SmartSight, our intelligent automation solution that improves front-of-store operations and enhances the shopper experience. Similar to our introduction of SmartPack for the transportation and logistics market several years ago, our focus on machine vision technology for a vertical-specific use case enables retailers to prescribe corrective actions for workers to execute and complete. With the acquisition of Reflexis, we are further accelerating our task management and workforce management capabilities. For 2021, as one of Fast Company's best employers for innovators, Zebra will further its legacy of software, hardware and services innovation, helping customers gain visibility into their operations, connect the intelligence resident at the front line of their businesses, and fully optimize their resources to gain a performance advantage. **SCAN**

Global Standardization and Centralized Labeling is Critical for Supply Chain Continuity

By Josh Roffman,
VP Product Management, Loftware

As businesses expand globally in 2021, they continue to recognize the importance of standardizing their labeling across their enterprise. Many companies are finding this is especially important during the recent pandemic because when relying on siloed, disconnected, legacy labeling solutions, continuity is at risk and valuable time can be lost. Fractured processes and multiple labeling systems can create unnecessary complexity in many ways. However, offering the ability to centralize on a standard labeling solution provides a wide range of benefits.

A standardized labeling approach enables companies to streamline maintenance and simplify oversight, while offering the control to make rapid label changes throughout the supply chain.

In addition, having a single, scalable solution reduces costs and facilitates expansion to new global locations. Most importantly, as business extend their reach across the global supply chain, it is critical they maintain labeling consistency across multiple markets and regions. By taking a standardized approach, companies can ensure that a common set of labels, centralized applications and data sources are used across the supply chain. This, along with centralizing content, helps global companies ensure business continuity and empowers them to meet complex, global and high-volume labeling demands.

Businesses today understand the importance of centralizing labeling to improve consistency and accuracy across their supply chain. A centralized approach will ensure consistency, enable regulatory compliance and enforce brand standards. In turn, businesses can differentiate their products, build relationships and maintain customer trust regardless of where in the world labels are printed. Centralizing also gives organizations more flexibility to support business continuity so companies are able to quickly shift label production from one site to another, while leveraging accurate, consistent data to keep the supply chain flowing. Ultimately, using a centralized deployment platform offers great flexibility, providing complete control over how capabilities and data are deployed over a global landscape. Leveraging a modern, multi-tier Enterprise Labeling Solution offers centralized access while providing scalability and flexibility for creating and updating labels.

One of the biggest advantages of enlisting a standardized and centralized approach to labeling is reduced maintenance and streamlined deployment. When dealing with multiple solutions companies face added costs and need more time to manage all those solutions. This is especially true as organizations try to reconcile labeling's increasing complexity while coping with difficulty securing scarce IT resources. It's clear that adopting cloud-based labeling simplifies maintenance and support, reduces IT involvement, and streamlines global deployment. Cloud-based labeling facilitates expansion, reduces operational costs and provides financial predictability. A cloud deployment also provides flexibility to scale, mitigates the need for extensive disaster recovery plans and facilitates automatic software updates. This could not be more important as we all navigate this "new normal" where having access to all mission critical applications and data is crucial.

Today's leaders understand that as they continue to expand their presence globally, it's important to

have the flexibility to scale everything – including labeling – to meet new business requirements. Whether expanding into new regions, increasing print volumes, or manufacturing new products, companies must be able to extend labeling processes and enable all users to access accurate and consistent data to adhere to corporate standards. Even when deploying solutions in a distributed fashion, the focus is to continue to maintain the ability to leverage common data sources, content, and configurations across the enterprise. This type of distributed approach is essential to handle global infrastructures' rigors, allowing companies to avoid outages and connectivity issues while providing high availability, failover and disaster recovery capabilities. Standardizing on an Enterprise Labeling Solution enables companies to empower global locations, as well as external suppliers, vendors and partners to access and use standard and approved labels and data and easily scale labeling to support growth. **SCAN**

Key Trends Set to Impact the Labeling Market in 2021

By Ken Moir, VP Marketing,
NiceLabel

As we look ahead to what 2021 has in store, organizations are increasingly looking for integrated solutions for everything from artwork management to factory labeling and direct marking. As a result, the move to convergence is the trend we expect to change the face of the labeling market.

This convergence is supported by the ongoing rollout of centralized label management systems that can interface with a wide range of devices performing a wide range of different functions. These label systems will also integrate with vision management systems and product lifecycle management systems, typically rich sources of data.

Along with a rise in integration, data services are likely to also see significant growth across the labeling industry. The move to online remote centralized management of labeling is helping generate more data and that will help provide actionable intelligence to many businesses. For instance, printer manufacturers will be able to tap

into much more insight on how their printers are performing. Labeling system vendors will be better able to understand what features their customers are using and which they are not.

Further Migration to the Cloud

Another trend that will keep accelerating is the migration to cloud-based labeling. This is something that we have seen in 2020 and expect to continue through 2021 and beyond. The changes labeling vendors have made in adapting to the pandemic include the increasing adoption of a cloud-first approach to navigate a world of remote working and lockdowns. The channel has stepped up to the plate to help manage labeling in the cloud as businesses move their labeling operations off-premise.

Moreover, regulated industries that need to do system validation, are increasingly migrating to cloud-based solutions. Due to the large amount of work involved in validation, businesses restrict the number of updates they undertake as a result. Life sciences businesses can benefit from validation ready cloud solutions that enable them to streamline their approach to compliance, while limiting the number of updates they need to undertake.

The Continued Impact of the Pandemic

The Covid-19 pandemic will continue to have a significant impact on the sector throughout 2021. Change has already been driven by necessity. Across labeling, organizations have been forced to adopt new ways of working and often, they have found them to be more efficient than what went before.

Businesses now understand that they can work remotely and still be efficient. Vendors have reacted by modifying their tools and solutions. The same transformation is happening in the world of label management systems. Today, channel partners can collaborate remotely and provide services, whether it is designing labels or configuring applications, and they can remotely monitor label volumes and types of labels printed, helping to provide a much better customer experience.

The best way for businesses to ensure the quality of their labels next year will be through a technology known as vision inspection. These systems can help ensure that the barcodes and text on a label are perfect and that the label is the way it is meant to be. We will see vision inspection systems fully integrating with label management systems in 2021, giving businesses a closed loop and the reassurance of knowing that the printed label is what was meant to be printed.

Looking Forward

As businesses consider their labeling needs for 2021, they need to start moving to the cloud and standardize, centralize, and simplify their processes. We see an uptake of cloud-connected printers increasing through 2021, even though mass adoption has not yet happened.

The solution has existed for some time, but now there is a problem that it can help to address. With the advance of cloud-based label management systems, there is a need for cloud-connected printers that leave zero footprint on-premise. As we look to the future, these are times of great opportunity for the labeling and label management industries. The convergence and digital transformation of the sector, including the acceleration of the move to the cloud, will shake up the labeling and label management markets of not only next year but many to follow. **SCAN**

Great Opportunity for the AIDC Industry in 2021

By Brian Nies, VP of Sales,
North America, Datalogic

The advent of a COVID-19 vaccine brings a turning point for economies globally. This sentiment is reported by banking and economic leaders who believe that significant growth is to be expected. The CEO of Wells Fargo, Charlie Scharf, put it simply during a Goldman Sachs virtual banking conference: “It’s certainly quite possible that you’ll see a very quick recovery as the vaccines get rolled out, given all the pent-up demand that exists.” This points to great opportunity for the AIDC industry.

AIDC technology is at the core of the “digital expansion” businesses have had to make as they pivoted to survive during the pandemic. Enterprises moved to implement the massive shift to digital channels for every possible activity—meals, groceries, finance, education, fitness and more, each having a component solution with AIDC technology. Yet, many enterprises did not fully implement digital solutions, and some are waiting for the distribution of the vaccine to implement in hopes of seeing a faster ROI.

This is where AIDC partners can maximize their opportunities. Channel partners must be

focused, swift and consistent in communicating to customers that they stand ready to support them as they ramp up. Their messages must bring confidence that the AIDC solutions they bring are proven. This can be accomplished by leveraging case studies and customer success stories of pandemic proof solutions. The pandemic drove increases in online orders and made it difficult to fill positions. AIDC technology, such as the Handscanner, gives enterprises the power to respond to customer demands with their existing workforce while maximizing productivity. As enterprises begin to respond to the growing economy and relaxed social restraints, they will be looking for solutions that allow them to serve their customers while managing staff expansion.

A new normal has resulted from consumer behavior attributed to the pandemic. As the vaccine is deployed and social restraints are relaxed, many processes, procedures and behaviors will continue. Technology responses to the pandemic will continue to be the mainstream. Specifically, implementations that protect staff and customers, such as device cleaning and disinfecting. Healthcare solutions such as disinfectant-ready materials, antimicrobial plastics, and wireless charging have been adopted by retailers, manufacturers and distributors. These technologies allow enterprises to protect their staff, service their customers with confidence, and protect their investments. These needs will not go away with the end of the pandemic; instead, they too are the new normal, and they will provide a significant opportunity for growth of the AIDC industry. **SCAN**

Welcome to a New Beginning?

**By Steve Halliday
President, High Tech Aid**

Normally at this time of year I talk about the year past and the upcoming year. But 2020 wasn't the year that we thought it would be. Everyone has been affected by the pandemic, whether it was getting sick, working from home, losing sales, or other issues, 2020 was not a great year for many.

Those people that attended the AIM/RAIN virtual event "engage again" heard David Krebs from VDC Research talk about "From There to Here and

Beyond: A look at the AIDC Market." David spoke about the effect that the COVID-19 virus has had on our industry and the effect it will continue to have.

He stated that 46% of CFOs are accelerating automation as part of a post-COVID strategy, with 81% of organizations "slightly" or "aggressively" accelerating the pace of AIDC/Mobility investments post-COVID.

These numbers are staggering and show that the value of our technologies is beyond compare. He went on to share that although the market has seen a slowdown in 2020 with negative growth in our technologies, the next two years will see a major bounce-back, particularly in the RAIN RFID technologies.

VDC Research was also instrumental in creating the RAIN RFID Market Research report, available from the RAIN RFID website. This report also focuses on the effect of COVID-19 to the marketplace and shows that the worst-case CAGR for RAIN tags (2019-2024) is 16.8%, while the best case is 28%. The report is available from the RAIN website.

RAIN RFID is rapidly becoming the technology of choice for companies that need to take their business to the next level, and we expect to see more changes in 2021 as more markets and applications come to the front with the RAIN deployments.

And 2021? Well, I see that "virtual" will continue to be a common word through much of the year. RAIN has already postponed its physical meetings until at least September but will continue to raise the level of virtual meetings. I think that more companies will understand the need for AIDC technology to increase their efficiencies and I see positive growth in the industry. I think there will be changes in our industry as we seek better ways to deploy our technologies, and I am sure we will continue to see changes in the companies that make up our industry.

I hope everyone has a great holiday season and that we all have a happy New Year with things returning more to the "old" normal.

Is your company keeping up with the changes in international standards that relate to AIDC? Are you aware of how the Internet of Things will affect your business? High Tech Aid can provide detailed, customized reporting, monitoring, and meeting attendance for your company needs. Email steve@hightechaid.com for more information.