



LogicalDOC
DOCUMENT MANAGEMENT SYSTEM



Transitioning
From a Paper-based to
Paperless Office System



Organizations around the globe are striving towards ever expanding goals, trying to achieve more while simultaneously decreasing the amount of resources used. For many employees, keeping their heads above the waters of daily workflows can be a hassle, as they are overwhelmed with information. The flow of this vital information is constantly being impeded by inefficient paper-based business processes.



In less-paper-based offices, working becomes more graceful and flows with more efficiency by changing manual processes, and making repetitive tasks more computer-driven. Recent technological trends have created a demand to transition into a paperless era, making it an important goal for companies to strive towards.

Paperless office software, if adequately installed and implemented, helps employees to swiftly gain access to needed contents and facilitates them in completing tasks, as well as provides security for saved data. It delivers them from difficult, time-consuming tasks, and the torture of not being able to find needed information.

It is likely that most of your associates already have installed electronic based systems in their offices. This should solidify the fact that going paper-less has dominated your larger business ecosystem more now than ever before. You will not just be transitioning to a digital system, thereby digitizing your internal paper-based processes, but you will also have free flowing digital interaction between all associates that have gone digital.

When you find yourself in an entirely computer based environment, purchase orders, processing of invoices and service orders are far more accurate and quickly completed. For instance, if your supplier sends you information electronically, your paperless office software will automatically extract the data from those files and forms, preventing redundant data entry. This allows your workers to concentrate on reviewing the data instead of spending time keying it in.

There are an inexhaustible numbers of reasons to go paperless. The following are a few reasons why countless organizations are striving to transition their offices from paper-based to paperless systems:

1. Smooth-running workflows



The ability to access information with just a click means you can easily route and distribute information to a large number of people across various departments, offices and systems. This swift access will greatly improve efficiency in a variety of contexts, such as approval processes.

2. Greater agility



With your competitors striving to keep one step ahead, the agility and efficiency that your offices will gain from going paperless will allow you to stay in the running; to remain competitive, you have to go paperless.

3. Cut-down Lower business risks



In addition to making tasks faster, digital environments provide a secure working atmosphere. Access controls and data security makes it easy and inexpensive to maintain compliance as well as curtail the chances of misplacing files, which could lead to revenue loss. As compared to paper-based systems, enterprise content management (ECM) helps maintain office/business confidentiality for information such as contract details, and patient or employee data.

4. Improved collections



Accounting departments greatly benefit going paperless, especially when it comes to collections. A major challenge for any collections department is accessing documents while on the phone with a customer. However, with the ECM system, vital documents are retrieved easily, helping reduce the collections cycle which in turn improves cash flow.

5. Increased transparency



There is greater transparency in use of digital systems compared to paper. It helps management monitor the processes and makes it easier to track tasks, spot shortcomings, and create opportunities for improvement.

Going paperless has a greater impact on your larger business ecosystem than ever before.



Could You Become A Paperless Office In Less Than 90 Days?

Setting a goal of achieving a paperless office in less than 90 days gives you a quarterly target to address and hit while helping to maintain momentum. The sooner you reach that deadline, the sooner you start enjoying the benefits of going paperless.

If you are planning to go paperless, it is very important to create a timeframe for taking this bold step. “Paperless in 90 days” is a worthy and achievable goal for any organization, and brings your company together as a team, working on the same page.

When you think about what would need to happen in 90 days to consider the initiative a success, it boils down to setting goals for digitizing three areas:



1. Capturing information



Your organization receives correspondence in diverse ways, including fax, e-mail, mail, and forms. Each of these entry points must be digitalized.

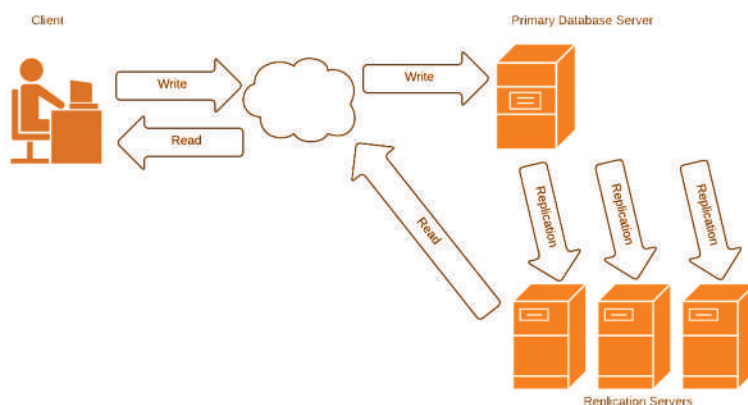
As the correspondence continues, the burden of scanning is reduced, but capturing e-mail is highly important. Creating a “smart inbox” enables people to easily feed e-mail to the appropriate channel of your system by putting it in a central file repository or using it to start a business process.

This is to ensure e-mails are captured using a method that makes tasks faster instead of receiving all incoming e-mail to individual accounts.

2. Distributing information



Information received through your paperless office should be routed through the organization. The goal here is to substitute paper shuffling with smooth-running digital workflows that contain programmed processes to route, review, and approve office documents.



3. Retrieving information



After the data has been routed, it needs to be stored in way that enables quick retrieval and managing access. You want to be sure that documents are well captured and correctly tagged and named, so that they are accessible with just a click.

Using the accounting department as a case study, let us see how the digitalizing process works. If you operate on a largely paper-based accounts payable (AP) process, there are numerous options for extracting invoices in electronic form.

You could ask your business associates if they would send electronic invoices in place of paper.

Whether you use electronic invoices or paper documents, there are indexing capture tools that read your files automatically and extract vital information such as customer name, invoice number, and amount.

The ECM system now uses the digital workflow to route the information to the appropriate channels, allowing the captured information to be processed.

This ensures that all invoices are distributed to the appropriate persons/ departments/ organizations for review in a pre-programmed approval process. Finally, the digital documents and other data are stored in the ECM's general document storage, and are already indexed for easy retrieval when needed.

That is just an example of what could happen to a department that turns to a paperless environment in 90 days. A major advantage here is that the invoice processing time is greatly reduced. This saves employees the stress and time of manually entering data in the index fields as it can now automatically be extracted by the system. Instead of having duplicate documents flying around, you have a single reliable record which can easily be accessed anywhere and anytime, reducing the effort that employees put into managing paper files. The paperless ECM system captures it once, processes it once, and stores it once!

Having the appropriate paperless office hardware and software is vital to achieving your 90-day target. Breaking that goal into six smaller strategic processes will make it far more manageable.



6 Steps | to Creating Your Paperless Office

These are some vital steps to take in establishing a paperless office in 90 days. Though it may be tempting to take shortcuts in achieving this target, each of these steps plays a vital role in succeeding in your quest for a paperless system.

Step 1

Developing a Leadership Team

The first step to take in going paperless is creating an internal ECM team. The most basic necessity for success is getting buy-in C-level executives and directors. This will go a long way in facilitation, attaining goals and will aid in staying in the right direction for achieving the initiative.

The team should be made up of company leaders, representative stakeholders, and experts who are willing to give feedback from a variety of departments in regards to the opportunities and probable challenges they face going paperless. It could also be necessary to invite an external ECM expert to the team, an ECM vendor or a third-party consultant, to offer guidance regarding the feasibility of the system.

This is to ensure that all departments have a say in the initiative and have concrete knowledge of the process, objectives and feasibility. In the selection of stakeholders, go for a group who can easily explain and relate this vision to the whole of the organization. The selected representatives should be top ranking in the organization so that they are able to effectively facilitate the team's agenda, whether it is to increase efficiency in file processing or improve overall cash flow.

In the absence of such a team, the end goal may be difficult to reach because of the lack of top managerial support and frustration due to conflicting agendas.

Care in choosing this team can never be over emphasized; various departments are essential for this project, and directors usually have their own ideas, problems and interests. Some departments may make the mistake of resisting change in the way that business is conducted while expecting other departments to conform to their ideals.

In the event of such a situation, an executive being on the team helps to keep the goal in focus and acts as a mediator to reconcile differences as the system is rolled out. Use this team approach, and aim to bring around great improvements by going paperless.



Step 2

Creating Awareness

Now that your team has been created, you need to share the vision of this team to the end users. Such awareness is vital to effectively manage the upcoming changes.

It is natural to observe some level of resistance from users, as they may want to continue using the paper-based systems with which they are familiar. However, clearly sharing the end goals of the initiative, and having support at the executive level will diminish the amount of resistance by such users, and strengthen connections to the overall mission.

We want to avoid making users feel as if they have been forced into a business process change in which they have had no input into the system design. The ECM team will often put more emphasis on top-level organizational benefits of the system, and on departments like human resources or accounting, but forget to relate the benefits to the end users.



Transitioning to a paperless office in less than 90 days requires a carefully calculated six-step process, and the right technology.

Without the support of an ECM leadership team, it is likely that your paperless initiative will collapse.

End users are more focused on their daily tasks and therefore pay less attention to company-wide strategies. They tend to judge the importance of the paperless office based on the impact that the system has on their job. Hence, they are often reluctant in adopting these new methods when the ECM system is rolled out.

The earlier the goals of the initiative are made known, the better the company will be. Introducing goals early on will help in warding off objections by allowing users enough time to adapt to new ideas, as well as time to develop a better perspective of the likely benefits on their daily office tasks. One effective way of spreading the information is by circulating YouTube videos or other documentation that presents the system in positive light. It can be extremely beneficial to create a content library which specifically focuses on the benefits of going paperless, and raises awareness of the effectiveness of ECM in specific business areas of the organization.

With this early awareness being created, users can become acquainted with concepts and goals before the system is finally unveiled. This prevents employees from feeling like an alien concept is being forced on them. Initially, the benefit of doing this may not be evident, however, it will be as you progress in introducing the system. Having everyone geared towards the direction of going paperless in 90 days will be instrumental in the success of the initiative



Step 3

Digging Into Your Business Processes

If your business processes are not clear to you, and you are unsure what is needed when transitioning into a digital environment, you may be heading down the wrong path. This will result in unjust feelings of dissatisfaction about the system. Missing a vital step could make you lose revenue and carry your present inefficiencies over to the paperless system.

Spending enough time evaluating your processes enables your ECM team to have a full understanding and greater visibility into your present bottlenecks. There is a great need for the “discovery process”, as end users are generally more familiar with the process inefficiencies of which executives may be ignorant.

At this stage your goal is to successfully go through the processes, and note the vital steps and shortcomings of the current system. Proper documentation of these issues will help in addressing them later on in the design step, and also helps end users get involved in the process.

As you carefully analyze the paper trail, you will discover bottlenecks and inefficiencies. Begin by going through the history of a specific document or business process, and ask some of the following questions:

- ➔ **How did the process begin? By e-mail, through phone call, or walk in?**
- ➔ **Who does the process involve?**
- ➔ **How is the information captured?**
- ➔ **Where is the document or data being routed?**
- ➔ **Who receives the information?**
- ➔ **How and where is it stored?**
- ➔ **How is the stored information retrieved when needed?**

As you try to answer these questions, users may be helpful in identifying issues like, “I wish it could handle this,” or “it’s a waste that we still have to do this.” Proffering solutions to those user concerns as you build digital workflows will help increase efficiency and job satisfaction.

Step 4

Designing the Solution

Assuming that your team has great visibility into your business processes, you should begin to work with an ECM consultant or vendor to draft a paperless system that will provide great solutions to the bottlenecks and other in capabilities. Key issues to be considered include how to link up files, where to share information, and what index fields to build into the system. This will determine the features and components with which your paperless office should be created.



The aim of the design phase is to reconcile your business vision with the professionalism of your ECM vendor or consultant, believing that the expert's solution will bring your ideas to reality. If, however, the solution falls below your expectations in some aspects don't panic yet; there is still time to rethink and reconfigure until your expectations are met.

This step allows users to foresee how the change will take shape, and the benefits that they could derive from such change. When convinced, this will generate excitement and eagerness to going paperless.

If the previous steps were religiously followed, the end users are now part of the process. At the design stage, users become curious as to how soon the system can be installed. They have had their say in the delivery process, and the design has shown them expressly how the system will address their pains. They have foresight of the vision, and can't wait to have it! The enthusiasm isn't just from the end users alone; even top level management will be excited upon seeing the time-saving benefits and higher-level tasks that can now be performed with your paperless system.

Step 5

Deploying Your ECM Solution

Integrating your ECM system into the office may begin with a test system or a series of phases. You will have to start training for the new system - your IT admins must closely monitor the ECM experts during installation.

When the system is installed, test-run one of your processes with a sample file or document which can also be used as a training module. Deployment finalizes all earlier planning steps. If the steps have been followed correctly, you are set to begin applying the appropriate technology to the right business processes, thereby becoming a paperless business entity.

Step 6

Documenting Your Paperless Office

Implementing your paperless system into the office is only the beginning – it is not something that you install and are done with. It is a growing system that will change and evolve to meet your needs. The system will support the growth of your company, as new processes and areas are explored.

Therefore, there is a vital need for the proper documentation of solutions, which will include the findings of your discoveries, the design process, and the configuration of the system. This documentation should enlist the admin users, so that they can easily be contacted when the need arises.

It would be counterproductive for an employee in an ECM leadership role to take over a position, and be unable to understand how the system works. In most cases, an ECM system, which has been installed for many years, may still be running in the back office, however, people are often ignorant of how it works and how to use it. If the system lacks transparency, and employees are unsure how the system should be functioning, the investment will end up being a waste.

Keeping detailed documentation of your new paperless office structure helps to ensure consistency, which will have positive long-term advantages and loads of benefits for both end users and the organization. It also provides the support team/experts with a typical overview of what was installed, making it less stressful to handle future problems or system upgrades.



Addressing users' fears of digital workflows will help to further improve job satisfaction and efficiency.

ASSESSING THE EFFECTIVENESS OF THE PAPERLESS OFFICE

While keeping extraneous factors in mind, these six steps can help an organization go paperless in less than 90 days. But how do you measure the success of your new initiative now that you are operating a paperless system?

On the surface your company seems to have achieved the long sought after goal of going paperless in less than 90 days, but has the paperless system enhanced your employees' efficiency and job satisfaction?

1. Capturing information

Do you find it easy to capture all of your documents in the ECM system? Has there been a reduction of redundant copies? If the capturing is effective, there should be no printed copies being made for personal records and tracking.

2. Routing information

Are documents quickly processed under the new system? Observe how long it takes to get approvals. If the time frame has reduced, then there is an improvement.

3. Retrieving information

How easy is it for employees to search for and retrieve files stored in your new system? One way to assess the level of success in information retrieval is to see how confident employees are at retrieving files at any time from the system.





Keeping detailed documentation of your new paperless office structure helps to ensure consistency, which will have positive long-term advantages and loads of benefits for both end users and the organization.

Are you now ready to take the next step towards becoming a paperless office? Having a special, custom-made plan is vital to achieving maximum returns on your investment.

LogicalDOC has built a highly efficient process called “Document Management RoadMap.” This rich and comprehensive guide critically examines the necessary steps to restructuring your business and improving documentation, workflow, and employee collaboration and satisfaction.





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