



It's Time to Get Off the **PAPERLESS OFFICE FENCE**

Digital environments offer productivity improvements

Nobody ever said, "My job would be so much easier if only I had more paperwork!" So, why is your company still on the fence when it comes to a paperless office? The technology is here. It works. It's affordable.

Len Knudsen
is a certified
document image
architect at
Real Vision
Software Inc.

In this digital age when operating at the speed of paper is unacceptable, why are businesses reluctant to move to a paperless solution? Some may question the value it delivers, while others may be overwhelmed with choices. Or it may be as simple as an unwillingness to change. Addressing these concerns will make your file cabinets disappear faster than a \$20 bill at Walt Disney World.

The Value of Paperless Solutions

The inefficiencies of paper are obvious. It slows work down,

wastes floor space, is challenging to archive, and is exposed to security risks or disasters. Paper is shuffled, routed, filed, retrieved and copied. More time handling paperwork means less time for productive business.

The benefits of going paperless are intuitive. Digital documents are easier to find, share, protect and manage, which results in greater efficiency and faster responses. Eliminating hard copies allows remote users to have secure access to documents over the web or from a mobile device. And you have improved backup capabilities.

The tendency is to focus on expenses, but proper justification compares quantified benefits with anticipated costs. In "Paper Wars 2014," a report released by the Association for Information and Image Management, 77 percent of paperless projects had a reported payback period of 18 months or less, citing improved access, responsiveness, productivity and control as primary benefits.

Attributes of Effective Paperless Solutions

Production work environments demand solutions that go beyond digitizing paper and include

automated capture, advanced workflow, e-signature capabilities, security controls, web access and mobile apps. Effective solutions offer these attributes:

- **Adaptability:** Application interface options, program calls and exits to easily integrate with business software are provided. For example, an accounts payable user working on a vendor transaction could click for instant access to all related documents and select them for viewing, emailing or printing. Effective solutions provide import features to accommodate “born digital” document sources, such as spreadsheets, PDFs, emails, printed output, photos or videos. They provide workflow capabilities to automate manual paper processes, such as routing, approvals, signatures, tracking and auditing.
- **Scalability:** Paperless solutions can extend beyond the initial application to other departments, which each have unique indexing and functional requirements. Licensing terms should encourage the expanded use of the product across your organization. They provide authorized access for remote users (employees, vendors or customers) over the web or from a mobile device, and advanced capture capabilities to reduce your data entry workload. Automated indexing examples include passing data from an application or database, drop-down selections, or assignment of dates and values based on workflow rules. Recognition techniques to identify forms,

10 Questions to Ask Vendors

- How many systems/indexes exist?
- What user/workstation charges exist?
- What threshold/workload fees exist?
- Is a capture system provided?
- What modules cost extra?
- What mobile apps exist?
- What is the cost for a high availability license?
- Who does installation and training?
- What does annual support include?
- What cloud/subscription options exist?

10 Questions to Ask Users

- Who are the key users/departments?
- What application software do they use?
- What type of documents are handled?
- Where do these documents originate?
- Who needs access to these documents?
- How long/where are records stored?
- What happens when files are missing?
- What are the bottlenecks/problems?
- What work measures/standards exist?
- What systems for conversion exist?

read barcodes or perform optical character recognition are additional considerations. E-signature solutions are also rapidly replacing wet signatures on documents for point of entry capture.

- **Manageability:** Security controls are provided to establish user/group authorizations and restrict document access by index value, document type and viewer option. These solutions keep detailed audits on which user performed what action on which document at what time and from which device. They also track work statistics that report completed items and in-process items, and provide retention/purge controls to enforce regulatory compliance standards. In addition, they enable you to establish expiration dates and retention schedules by document type with the flexibility of user override before documents are purged.
- **Affordability:** Paperless solutions must be cost-effective and deliver value. It’s important to understand both fixed and variable costs. Are

there user-based fees? What optional modules are not included in the base product? Are there separate charges for the capture system? Does high availability cost extra? How much is annual support, and what does it include? Pricing for paperless solutions is not universal. The more expenses are contained, the easier it is stay within budget.

Moving to a Paperless Office

Planning for a paperless office is equally as important as the technology you select. A common mistake is assuming every user needs every feature and every document must be paperless on day one. This overly aggressive approach is discouraging and usually results in an abandoned project.

Going paperless doesn’t have to be complicated or painful, but it does provide an opportunity to significantly impact your business. You should involve users early in the planning efforts and keep the focus on their requirements versus product features.

The best approach is to follow the paper trail and ask users what they do, why they do it and what happens when things break down. Once these requirements are clear, it becomes easier to evaluate the alternatives.

Take Action

Effective paperless solutions will help users find information faster, manage it better and provide a safe and secure alternative to physically storing paper records. By following these tips, you can clarify what users need, which makes it easier to compare paperless solutions. Isn’t it time for you to get off the fence when it comes to going paperless? **P**

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