

The Paperless Office – How Software Can Improve Your Efficiency

Look around your office – do you see piles of paper or walls of filing cabinets? The paperless office is within easy reach using today's computer software. There are many reasons to go 'paperless' and by selecting software products that allow you to attach documents for historical reference, you can improve efficiencies and avoid potentially disastrous situations for your company.

Do file cabinets line your walls?

Paper systems need space to live – and office space is expensive, whether in file cabinets or piles on desks and floors. Paper is easily damaged by tearing, spilled coffee or sticky lunch time fingers.

Electronic files take little or no office space, are not easily damaged and documents remain in the same condition as you originally received them. By storing your files electronically, you can save money on the use of increasingly expensive office space for storing paper files.

Do you spend a lot of time looking for files?

Whether you have a strict or haphazard filing system, paper has a way of disappearing. Perhaps the document is just misfiled, but there is also the possibility of accidental discarding or intentional 'borrowing' by someone who never returned the document to its original place. Looking for documents can consume precious time that could have been spent on productive activities. In the unfortunate case where the document is not found, what happens next? Are you calling around hoping someone else has a copy, or are you left with a problem situation that takes even more time to solve?

By storing your documents electronically, you can access the needed document in seconds with a few computer key strokes. You also don't spend time re-filing the document later.

Can you find your documents by more than one search criteria?

Paper files are generally managed and organized using one system. What if you need to find information using some identifier other than the one you selected for your filing system? You could make a copy of the document and create a second filing system resulting in the storage of more paper. Chances are you spend additional time searching and perhaps never locate the required information.

Many computer systems provide electronic filing of attachments with multiple search options for locating records. As an example, you could locate your document by company name, contract number, project number or contact name.

Can you control who has access to documents?

Are your file cabinets locked? If not, how do you control access from other departments, late night visitors or even outside persons such as your cleaning company? What about documents left out in the open on desks or floors? Unapproved viewing is bad enough, but there is the real possibility that documents could be removed without your knowledge – lost forever or used for unapproved/illegal activities.

Electronic files can be protected through passwords and user access rights. Many computer systems for sensitive data have audit trails indicating access activity, allowing tracking if it is necessary to monitor access to critical information.

Do you need to share documents with other departments?

Is your phone ringing with personnel from other departments asking for information or copies of documents? Perhaps they just help themselves to your files. If you allow other department personnel to remove files, do you know which files and whether they were returned? Searching, copying, sending and re-filing paper documents takes time and resources. Once the copy has been sent, how do you notify the department of any updates? Personnel within your organization may be using outdated information to conduct critical business, which might create undesirable results.

With documents saved electronically, you can provide specific individuals or departments direct access to those documents. Most software programs provide user passwords that are 'view only' allowing others to see, but not change data. Personnel in other departments can search documents themselves and have access to the latest version whenever necessary.

What would you do if a fire or flood destroyed your documents?

Crying is no longer the only option. Paper is easily destroyed and unrecoverable. Lost contracts, correspondence and other critical files can devastate a business. In addition to the enormous time it will take to reconstruct your files, there could be legal ramifications if you need the document to prove your case or enforce a policy or contract term.

Maintaining your files electronically provides a simple backup solution. Even if your computers are damaged or destroyed, your I.T. department should be creating regular backups of software files and saving these backups offsite as part of a standard disaster recovery program. The files are quickly restored once new computers are installed - and your critical data stays intact.

Where are your archived documents?

Most paper files are archived after some period has passed. This may be as simple as boxing everything up and putting them in the building basement or contracting with another company to store them for you. Some companies even go through the time and cost of putting them on microfiche for easier archival access. Imagine what happens when you need to find something in the archives for a critical audit or court case. Will you be spending the next several days going through boxes of paper or microfiche?

Most document storage software programs provide the ability to store documents by date so that you have easy access to not only the most current version, but prior versions as well – all in the same place. Consideration is needed on how to archive computer data for future retrieval. You may want to consider tagging customers and documents as inactive instead of deleting them if you believe there is the possibility you will need to access the data later.

Creating a paperless office is no longer the wave of the future, it is the current standard. Filing electronically is important and within easy reach using today's computer software. Depending on specific needs, there are software products which allow you to attach documents for historical reference, whether through direct scanning or importing. An effective electronic filing system can save resources and protect your company from a variety of hazards, in addition to dramatically improving efficiency, reducing costs and streamlining operations.

GG-One Software has been providing insurance certificate tracking software since 1994. Their Fastrack Insurance Certificate Tracking and Document Management product is available in Web and Windows versions. Visit their website to learn more. <http://www.ggonesoftware.com>

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April 18, 2008