

Paperless work through digital processes

The ultimate 5-step-guide

How to maximize your company's performance in just **3 months**.

How to make your business truly paperless in a quarter, reducing costs, boosting operational sustainability, and doing something good for the environment.

FOREWORD

It is not the job of PaperOffice DMS to put a finger in the wound, but honestly, despite so many possibilities on the digital level, the printers in most companies are still overheating and spitting out endless rows of more or less printed paper.

At the turn of the millennium, with the increasing operational **digitalization**, it was generally and actually logically expected that paper consumption would now fall dramatically.

But the change didn't happen. Rather, paper consumption in most offices has stagnated at a very high level for over 20 years.

According to a survey, the decision-makers in nine out of ten companies are aware of the potential of the **paperless office** and can very well imagine using DMS systems in their company.

The approach of the paperless office is increasingly the focus of media reports, but is hardly used in practice - especially not in small and medium-sized companies. It's not just about the time and money involved.

But with just a few measures, paper consumption can be greatly reduced. SMEs benefit from flat hierarchies and flexible structures.

The current instructions show you how to go **paperless with digital processes** in your company in just **5 simple steps** thanks to PaperOffice.

THE ADVANTAGES

of using PaperOffice
are obvious:

- Optimization of all workflows
- Flexible working, no matter where you are
- Massive cost reductions in all areas
- Maximum security against theft and loss
- Less stress through automation
- Risks in business processes decrease
- Customer relationships improve
- Internal transparency increases



„...high security when processing and storing digital data.“

The Fraunhofer Institute in Germany found out why the ideas of the bosses in relation to the paperless office are not progressing or are only doing so very slowly and with great difficulty.

For 86% of employees in administration, whether commercial or public, the software applications offered are too complex in combination with the necessary hardware. As a result, almost half of all documents are still printed out today. This is exactly where PaperOffice DMS comes in.

An easy-to-understand document management system with a high level of security, because, just as employees want easy-to-use software, company management wants high security when processing and storing digital data.






PaperOffice DMS shows that these two points are compatible with each other and this guide with step-by-step instructions will show you how it can be implemented.



The **5 steps**

you need to follow to reduce paper consumption in the office
and go digital.

We have listed 5 steps
that will accompany you on the way to the paperless office:

- 1**  Strategy and analysis of processes
- 2**  Determination of the periods for switching to the paperless office
- 3**  Recognizing acquisition paths and determining data storage
- 4**  Introduction of PaperOffice DMS plus hardware
- 5**  Completing the transition to the paperless office

1



Strategy and analysis of processes

Plan your deployment in the paperless office well. Take enough time to analyze the processes in your company. What must be available or kept in paper form? Which documents is it sufficient to have only in digital form?

Documents and information come from different sources

Most likely, you will come across information that comes from different sources and in different formats. Some of it will be in digital form, stored in files or databases and some is in the form of printed documents.

You may wish to scan and digitize all previous documents, or transition to a paperless office/system by a certain date, as well as employ digital data to continue and work efficiently in the future.

The first option requires more time and resources. Ideally, you and your team will decide how to organize electronic files and set up a continuous scanning process step by step, so that all future documents are digitized.

Use a multifunction printer/scanner for scanning and directory monitoring or mass archiving for large amounts of documents.



1

Time and personnel planning for the paperless office project

A **quarter or 90 days** is a reasonable timeframe to **implement the actions** that will be required to transition to the paperless office.

It is also a period that allows for a smooth transition. Quick-fix solutions that force employees to make changes from one day to the next are usually short-lived. In addition, it is possible to not disrupt operations when operating gradually.

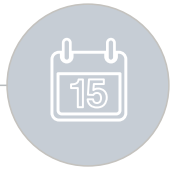
Basically, when switching to the paperless office with PaperOffice DMS, there is no need for a project team made up of several people.

Deducting these individuals from their actual tasks is not even possible in many SMEs, nor is it desirable. What makes sense, however, is to make at least one person have the authority to issue directives the CDO, the Chief Digital Officer. Those who are not so keen on American abbreviations can also appoint him or her as a project manager for a paperless office.

It is important that the person concerned thoroughly familiarizes themselves with the PaperOffice DMS.

Due to the clearly structured format of the software and the extensive and easy-to-understand tutorials and videos for every aspect, this is something that does not require neither an IT degree nor external training. In addition, it can be done as "learning by doing" accompanying the first conversion measures.

2



Determination of the periods for switching to the paperless office

Dividing the envisaged 90 days into smaller time periods has the purpose of being able to focus on each phase of the transition and have the possibility of reflecting on the processes involved. In addition, successes in the changeover can be documented more easily.

The employees get a better understanding of the measures and do not feel overwhelmed. At the same time, the goals must be communicated internally, which is in line with a mental change. How important this is has already been explained in the foreword.

It makes sense to divide the **90 days into three sections of 30 days each.**

The first 30 days are used to analyze all processes that are to be converted from analog to digital.

In the **second 30 days**, the PaperOffice DMS and the required hardware will be introduced, but initially only for training purposes and accompanying ongoing processes, if this arises.

The **last 30 days** are taken up with making the process transition from analog to digital, which will undoubtedly lead to questions from employees. A few incorrect operations are also possible, but this can be corrected at any time thanks to the hierarchical structure of PaperOffice DMS.

At the end of the last 30 and thus also the total 90 days, there is a fully integrated document management system that already allows an analysis at this point in time of how great the savings and advantages are and will be in the future.

3



Recognize acquisition paths and determine data storage

In the first 30 days, the focus is on examining the processes in which paper has played the main role so far. To do this, it is necessary to recognize the interfaces of external and internal communication in the company and to follow their life cycle, which can be:

- Telephone calls (e.g., an order form that is then filled out)
- E-mail communication (e.g., mail will be printed out for the next meeting)
- Letters
- Business customer visits (e.g., see telephone calls)
- Accompanying documents
- Internal correspondence

The next step is to determine when and where the transition to printed paper takes place in electronic forms, as well as the path from paper to archiving or just to the wastebasket.

Process documents are digital from now on

Avoid using paper as far as possible: meetings, minutes, incoming mail, outgoing invoices, and notes can all be created directly in PaperOffice. Tasks and workflows are also implemented digitally.

Digitize invoices and gradually implement paperless accounting

The issuance of invoices as such is also part of the paperless office, although not only to be seen in this context. Digitization and proper processing are a problem and must also be planned and implemented correctly.

Anyone who maintains their invoices digitally and also creates their digital bookkeeping recognizes the greater potential for savings and can make the general accounting process more efficient.

3

Data storage

If you've already decided that your physical files are now going to be digital ones, the immediate question is to decide where you are going to store those digital files. Will you store them in a database locally or on an external NAS device?

When switching to a **paperless office**, you should not save on one of the most important facets. Local data storage and use of NAS devices.

Or you do not want to have the data storage or the database in your company in order to avoid fire, robbery, etc., but using a cloud solution is out of the question for you for legal reasons. Then of course the solution with the use of the database on a **dedicated server**, which is assigned to you alone, is a very good option.

There is a wide selection.

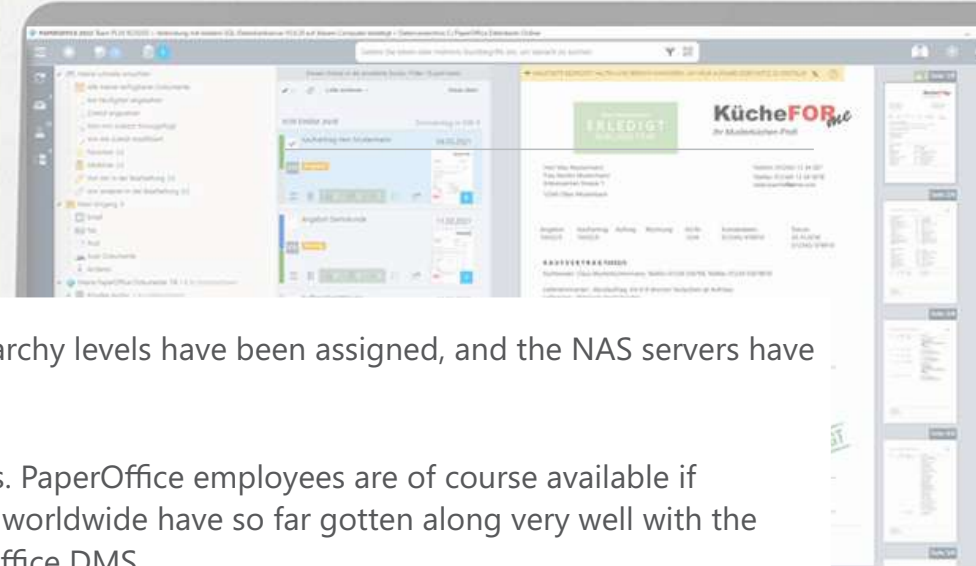
Actually, the search for solutions also belongs in the section of the first 30 days. With the PaperOffice DMS document management and NAS hardware, integrated into the company network, all the solutions are available to implement the transition from paper to digital.



4



Introduction of PaperOffice DMS plus hardware



After the software has been installed on the computers in the company, the hierarchy levels have been assigned, and the NAS servers have been set up and networked, training on the software takes place.

This does not require external (usually synonymous with "expensive") consultants. PaperOffice employees are of course available if required. The more than one million companies that work with PaperOffice DMS worldwide have so far gotten along very well with the detailed tutorials and videos or the telephone advice on questions about PaperOffice DMS.

Most of the processes are self-explanatory and are accompanied by a very well laid out help menu. By the way, you don't have to be stubborn about sticking to the exact 30-day timeframe. If everyone involved in the changeover from analog to digital is of the opinion that it will work, the process can be shortened as desired.

Folder structure

A meaningful folder structure is important so that you can easily find yourself again after the changeover. Easily organize your digital folder structure according to your existing "real" one.

Rely on automation

Thanks to the intelligent AI recognition, you can recognize important document data in the document, extract it, and use it for document keywording. This saves time and therefore money.

5



Complete the transition to the paperless office

The last 30 days (or less) start and the employees finish the education and training phase. E-mails are no longer printed out, but are instead saved.

Use workflows and stamps

Documents and emails can be accessed, edited, and made available to other employees at any time via the workflow function in PaperOffice DMS. Freight documents from deliveries or incoming letters are digitized using a scanner or a cell phone cam and converted into text documents using PaperOffice's OCR software.

The stamp function enables various workflows to be triggered and further actions to be carried out. Dynamic variables can be added to stamps and even email notifications are automatically sent upon use.



5



Don't forget to back-up

There is only one central memory with a backup function. The question never arises again as to which employee has a specific document stored on his or her computer and how to get to it because he or she is currently unavailable on vacation.

An encryption of the data that is also used by the US military is done. The currently popular and lucrative game of hackers with ransomware bounces off PaperOffice.

Remain consistent: The beginning is always difficult, because processes that have been rehearsed for years are new for the time being. Don't fall back into old patterns.

Stay consistent and experience the paperless office.

CONCLUSION

Operational processes are now transparent and comprehensible.

PaperOffice software saves your electronic documents with reference to the underlying process and additional document keywords. This way, the paperless office only brings advantages for your business, and thanks to PaperOffice you can make your customer relationships more transparent. Every process is digitally solved in one way or another, digital workflows and automation will help you with that.

It saves time and work and increases the quality of your results. Take advantage of all the benefits of a paperless office.

Internal routes are shortened and, of course, the cost of purchasing paper is reduced, but more importantly, the world's forests and thus ourselves, are being done a favor. No company has to be ashamed when it talks about the changeover to the paperless office with the help of PaperOffice DMS and advertises with it. On the contrary, demonstrable, honest sustainability is seen everywhere as a reputation plus. Start now.

What's next? The digital path with PaperOffice - that's the way:

So that you are not overwhelmed by the range of functions, and can quickly and easily manage the digital change in your company, in order to achieve relevant improvements and the breakthrough to the paperless office as well as workflow and cooperation between employees, we have developed proven methods over 20 years to get you started to make it as easy as possible.

Together step-by-step.

Request a presentation today: We would be happy to show you PaperOffice on a prepared system via TeamViewer meeting without obligation.

www.paperoffice.com