

# **An IT Manager's Guide for Moving Toward the "Paperless" Office**

**An idea whose time has finally come?**

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While the totally paperless office is a vision that has yet to be achieved, integrating paper into electronic business processes is an attainable accomplishment that can improve operating efficiency and deliver profit to the bottom line.

Small-and-medium-size businesses in particular are well positioned to take advantage of technology that can move paper into the digital mainstream. Unencumbered by corporate IT departments and lacking excess resources to mask operational problems, smaller businesses have the agility to respond quickly to challenges. So while the paperless office remains a myth, eliminating paper from business processes to create a seamless digital workflow is a definite reality.

## Why should paperless office be on IT's agenda?

Businesses that excel at managing information will see increased productivity from office professionals, improved workflow efficiencies, better customer service, and lower overall expenses. Since business processes almost always involve paper, the challenge is to merge parallel work flows—an electronic process and a manual paper-based process—into a single, efficient work stream.

The solution is to develop information management strategies that manage and control for both electronic and paper-based processes. That is where IT can take a leadership role.

Bundled with the base product, eCopy Quick Connect™ can easily automate a single workflow by integrating scanned documents into existing business processes using versatile file naming, indexing, and custom "scan to" buttons, with no programming required. Additional Connectors provide integration capabilities that enable paper documents to be scanned and distributed to leading document management systems, including Microsoft® SharePoint®, and to e-mail, fax, cost recovery, and other business applications directly from the copier or scanner.

## What steps should IT take to pull paper into electronic processes?

The first step is to consider the types of documents being used. For instance, are they used in high-volume, repeatable transactions or in ad hoc business processes? That will dictate whether you need a specialized, production-focused scanning operation or if you can distribute document imaging capabilities at multiple points in an organization.

Next, evaluate document imaging solutions with your office environment in mind. Look at your office workflows and how your company is organized—for instance, single site or multiple sites.

Finally, consider the user experience. If you plan to distribute document scanning capabilities to 20 or more people across the organization, look for applications that are easy to use and readily adopted. Avoid solutions that require on-going user training and IT support.

## **Will opening up document scanning to a large community of users create security concerns?**

No, it won't. Even though scanning capabilities are distributed throughout an organization, IT managers can deploy document imaging applications that are protected by the existing security processes that safeguard intellectual capital and conform to government and corporate compliance programs. This means that businesses of any size can implement a document imaging application without requiring additional IT resources.

The document imaging software should allow IT to leverage existing network connectivity to require user authentication, so that access destinations and other security rights are all enforced at an individual-user level.

With this approach, companies can maintain document audit trails, logging which documents were scanned, when they were scanned, who scanned them, and to whom they were distributed.

## **What administrative and support considerations should an IT manager be aware of when considering distributed scanning technology?**

By managing scanning capabilities centrally on the network, IT managers can make available only the features and settings they want users to access—on an individual basis.

IT managers will want to deploy scanning software that connects directly to the network's e-mail address list. This will enable authorized users to scan and e-mail documents without delay from any networked MFP without entering individual e-mail addresses.

The software should increase productivity by giving IT managers the ability to create one-step processes, so that repetitive tasks—such as scanning a document to a specific repository location—can be executed automatically. This includes, for example, a scan-to-HR button to manage resumes or a scan-to-Finance button for invoice processing. The IT team should be able to deploy these applications without writing programs that require on-going maintenance.

## **What should an IT manager look for when integrating document imaging with existing business applications?**

Document imaging software needs to provide IT with API-level integration to the applications that are core to running the business—such as e-mail and content management.

This will allow scanned information to be available immediately, so that users can participate fully in a business workflow by introducing high-value documents at the point of their choosing.

## **Have small businesses successfully integrated scanning with their important business processes?**

Consider Minuteman Group, an insurance firm with about 20 employees based in Nashua, NH. Every piece of paper—insurance policies and revisions, applications, and more—that comes into their office is scanned and electronically routed to the staff—ready for use in customer accounts.

Minuteman integrated eCopy document imaging software into its IT infrastructure that included Microsoft Office and Outlook, Facsys, a fax server system, and AfW software, an insurance agency automation package.

Employees now have all of the data they need to do their jobs available electronically and ready to go. They no longer need to search for documents, and they can attach documents to a record in their AfW insurance system or e-mail policies to customers for their signature.

## **How has the addition of document imaging affected Minuteman's business?**

Their entire service process is more efficient. Tasks that used to take 15 minutes are now completed in less than 60 seconds at a desktop. Employees no longer spend time at fax and copy machines or waste time searching for missing paper documents, giving them more time to spend with customers.

Since every document can be accessed on the server, it is much easier for agents to work remotely. They can manage their schedules more efficiently and complete important tasks even if they are away from the office—and they no longer return to piles of paperwork on their desks.

## **How can an IT manager assess all of the different offerings?**

Your tactical goal is to convert paper documents into electronic images and integrate those images into digital workflows. But you should begin with a clear understanding of the objectives your business wants to achieve. In that way, your evaluation of solutions from different vendors will be grounded on your criteria.

You can read more about document imaging technology, learn from companies that have already implemented the technology, and discuss the technology with others who—like you—are assessing potential solutions by visiting the eCopy Document Imaging Blog at <http://documentimaging.typepad.com/>



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