

Going Paperless? Here's What You Need to Think About

Why go paperless?

The paperless office is as it sounds: a workplace in which you've limited or even eliminated the use of paper. This means going digital with your documents, and that can lead to a lot of benefits.

It can save your business money, increase productivity, save space, make documentation and information sharing easier, keep information more secure, and make for an eco-friendly office.

As makers of some of the world's most popular Portable Document Format (PDF) solutions, we often consult with businesses and governmental agencies that have the goal of moving to the paperless office. They understand the benefits. What they don't always know is how to get there.

So the question we're often asked is, how do you get started?

That's the purpose of this paper. It'll give you a solid outline for the issues and areas you need to address when going paperless.

Start with a paperless office strategy

Going paperless is not an overnight process, even for small organizations or sole proprietors. No matter the size of your organization, you need to start the paperless process with a sound strategy. That means making decisions about what to do not only with the paper documents that are already in your organization but also those that have yet to arrive.

You need to consider the hardware and software you'll need for converting documents to a digital format. Determine your process for converting existing forms, which most businesses and government offices have en masse. Settle on a process for creating new forms. Consider security measures in the digital document realm. The list goes on.

So let's cover off on these topics to give you a hand in creating a paperless office strategy that works for your organization.

Plan your file structure

A solid first step is planning the type of file structure you're going to use as well as how you'll organize your documents. It's a good idea to brainstorm with key members of each department in order to develop a file structure that works across

Together, you can consider the following:

- Which documents do you want to store electronically?
- Which documents do you need to access frequently and quickly?
- How will you search for your files?
 - This requires the files to be indexed to allow system search engines to quickly and easily find them later.
- How will you handle team collaboration?
- When should you officially begin to store your documents electronically?

You'll also need a way to access and manage your digital documents. That calls for a document management system (DMS). A DMS consists of computer software that enables you to perform tasks that range from simple to complex. This includes everything from filing, indexing, and document retrieval to more as workflow and process tasks.

In general, DMSs enable you to:

- Store, organize, and locate documents.
- Ensure the consistency of documents.
- Manage metadata for documents.
- Help protect documents from unauthorized access or use.
- Ensure consistent business processes (workflows) for how documents are handled.

There are a lot of options out there. Everything from DMS systems that you put on your own servers to cloud-based and open source solutions. Microsoft SharePoint, IBM, Google, Jive Software and Box are just a few.

Many of the organizations we work with use SharePoint as their DMS and as the hub when they create websites. You can use it as a secure place to store, organize, share, and access information from almost any device. All you need is a web browser, such as Internet Explorer, Chrome, or Firefox.

One of the reasons SharePoint is so popular is that it excels at one of the key functionalities all DMSs must provide—enabling content to be found easily when you search for it.

Content on a SharePoint server can display from many sources such as columns, libraries, and pages. As a site owner, you have a lot of control in determining if and how those digital documents are accessed. Use the default and all your content will be crawled, just like on familiar search engines such as Google and Bing, enabling it to appear in search results. Set permissions and determine whether or not the viewer can see the content in search results, depending upon the kind of content it is, and the kind of user they are (customer, employee, Level One Security, etc.). The choice is yours.

The key takeaway here is, a DMS can and should be central to your paperless office strategy.

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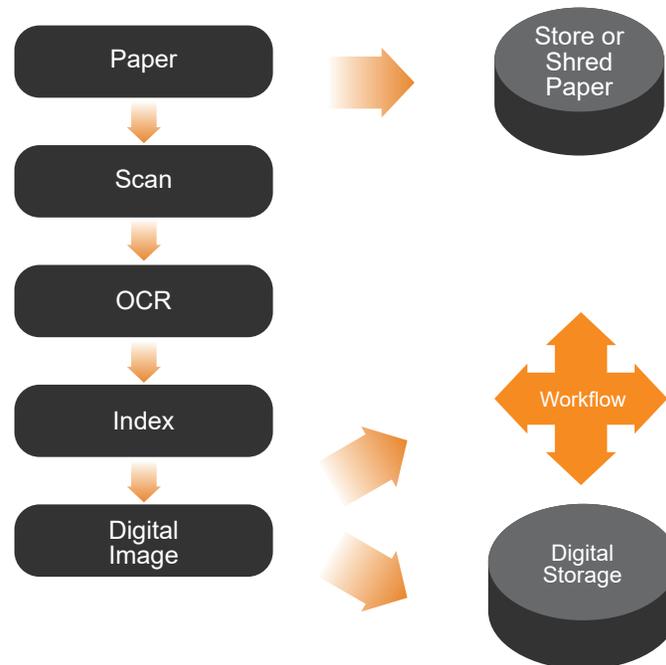
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WHITE PAPER



Plan your search strategy

Going paperless often means heavier use of PDF files, and for good reason. They're a de facto standard. They're easy to create. It's easy to convert existing documents to PDFs. They're secure. They're self-contained. And these days, they're even easily editable. What's more, you can convert documents into PDF documents and make them searchable, which can breathe new life into static image documents and paper.

If PDF is central to your paperless office plan, an IFilter should be, too. A PDF IFilter is really a plug-in that lets Microsoft search engines index PDF files so that you can search them more easily. Without an appropriate PDF IFilter, you can't index the contents of a PDF file, which means you can't search it. If you can't search for files, you will have a hard time finding the file when you need it later.

Also, PDF IFilters are very useful since they're integrated into Microsoft search, so they provide search results for multiple file formats at the same time. Which means, if the information you're searching for is located in different file formats (like .doc, .docx, .xls, .ppt, etc.), you can get all these files returned in a single search.

You'll also want to consider creating a keyword list that works for your organization. Keywords could be already included in the content of your electronic documents. If they aren't, you can tag documents with identification information to make them easier to search.

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Consider your scanning needs

Getting paper documents into your new paperless office system typically means scanning documents into a universal format, aka PDF. This means you'll need to determine a document scanning solution for your organization.

You can plan for purchasing scanners and doing the work in-house, but often, this is a monumental task for larger companies, and since your current employees already have work to do, this project will be a drain on productivity.

Instead, consider purchasing a document imaging system and task your provider with scanning all your records, setting up the databases, and training the staff. A wide range of info-tech services has emerged to meet the demands of the digital transition, and they'll help make the move to paperless smoother.

After scanning, the documents need to be OCR'd. Optical Character Recognition (OCR) is a software technology that enables you to convert scanned document into documents with "live text," aka readable, searchable text that you can change, copy, edit, and basically do anything you regularly do to text.

What to do about digital document storage

After you've scanned, OCR'd, and indexed your electronic documents, or created them digitally in the first place, you'll need to store your electronic documents, and there are a lot of options for doing so.

You can install your own electronic document filing system. The pro: it gives you complete control over your records. The con: you have to purchase, set up and manage the software, computers, file storage space, backup and other components needed for your DMS.

Another option is to go with an online/cloud-based document storage service. Not surprisingly, there are many of them, serving every type of user, from personal to professional, one-man shops to Fortune 500 companies.

Cloud-based document storage options for single users and small businesses include companies such as Dropbox, Evernote, One Note, and many others.

Mid-level cloud based file storage systems offer users the chance to develop a DMS with little or no IT investment.

For very large organizations or for those who need very high levels of document security, there are major software packages that are feature rich, modular, and have tools for customization and direct integration with other software packages such as ERP systems. Keep in mind that those sophisticated features come at a price and may require devoted IT resources to maintain them.

Consider form conversion

When it comes to the humble form, most businesses and organizations have hundreds of them, along with years of legal and regulatory procedures, and thousands of hours of employee training and business practices to go with them. That's why, when going to a paperless office, it's critical to consider your form conversion strategy.

When you use modern PDF document creation software, you can convert forms designed in any application to compact, cross-platform PDF files that faithfully preserve the look and feel of the originals. You can also create interactive forms that anyone with a free PDF Reader can fill out, save, and return online. Interactive forms can also be used to save input data directly into a central database.



For larger organizations, many DMSs offer automated, all-digital processes to systematically convert forms, while still enabling your organization to keep paper where necessary.

Collaborate on document development

Most organizations develop draft documents and email them out for review. Then each reviewer prints the document out, handwrites their feedback, and then provides the paper back to the original author. When moving to paperless, consider using an electronic review solution which not only eliminates paper, but enables all reviewers view and respond to each other's feedback.

Shared review bridges the gap between mobile and desktop knowledge workers to foster positive collaboration to develop better documents. Shared review allows document authors to share a document where all reviewers can view and respond to each other's comments. Since knowledge workers use both desktop and mobile devices, look for shared review solutions that enable desktop users (Windows) and mobile users (iOS® and Android™) to participate in shared review collaboration.

Document authors can typically host a shared review on a network folder, a SharePoint workspace, or through an email based review. Authors can manage document reviews and view the status of each review. Participants in a shared review have a wide variety of annotations tools available to provide feedback. Every annotation will have the participants name and time the annotation was made, making it easier for participants to collaborate.

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To help stop information leakage, make sure your DMS has Information Rights Management (IRM) functionality. This will provide you with online and offline protection of documents and email messages and attachments. IRM aids your organization in controlling who can access, send, print, or copy sensitive data.

Many IRM options exist, but we're partial to Microsoft Directory RMS, as it:

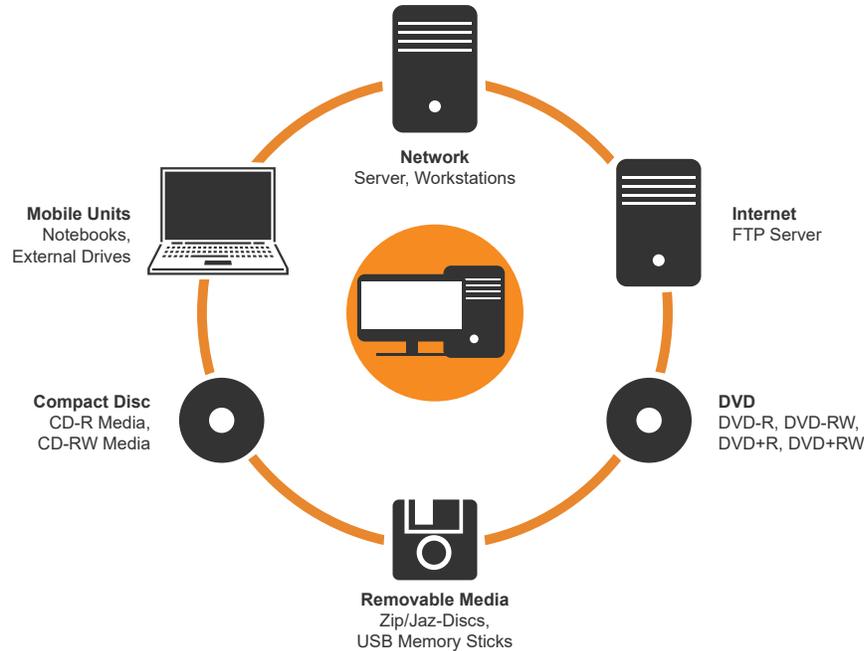
- Works across all popular Microsoft Office applications and PDF, making it a natural for most office use.
- Lets users define who can open, modify, print, forward, or take other actions with the information. Organizations can create custom usage policy templates such as "confidential - read only" that can be applied directly to the information.
- Offers persistent protection by locking the usage rights within the document itself, controlling how information is used even after it's been opened by intended recipients.

Make data backup a priority

Paper documents get lost. Unfortunately, so do electronic documents. Files get overwritten or deleted, drives crash, natural disasters occur. So, if you're going paperless (and even if you aren't), a backup plan is critical.

The best backup strategies consist of a combination of local backup, network backup and remote backup.

Local backup includes flash drives, external hard drives and media like CDs or DVDs.



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Your backup strategy should include local backup, network backup and remote backup.

Network backup typically means a network-attached server (NAS) that saves copies of your data right on your network.

A remote backup server stores your data in another geographical location and keeps it recoverable in case of a local data loss. That means if your office is in Chicago, you might keep your remote backup in Saskatchewan.

Taken together, this backup strategy is an ironclad way to ensure your paperless office data is always protected and available.

Plan for training

As with any new system or process, there's a learning curve. The same is true for implementing your paperless office.

One way to reduce the curve is to adopt systems and software that have interfaces, features and functionality your teams are already familiar with. For example, if your organization relies heavily on Microsoft Office products, choosing DMS components and PDF software that work with those products and offer similar interfaces and feature sets might be a good idea. That way, you'll make your new paperless system easier to adopt.

All that said, providing employee training for the information systems you use is going to be necessary. No matter how well designed your paperless office system is, you won't enjoy its advantages if employees don't know how to use it. That's why training should be mandatory, not optional. In this way you can help change old habits and introduce new, necessary skills for your paperless environment.

When to seek outside expertise

There's no question that going paperless can be a timesaving, resource-saving move for businesses and government organizations of all sizes. There's also no question that it can be a monumental undertaking.

Foxit has helped prominent companies such as First American Bank and Goodfellow Bros., Inc. achieve their goals to automate business processes and become a paperless office environment.

In the case of First American Bank, the high performance of our PDF Reader in their Citrix environment had already won over this full-service bank with nearly 50 Chicago area locations. So moving up to Foxit PhantomPDF on all Citrix servers was a natural.

For the family-owned Goodfellow Bros., Inc., a renowned national construction company, the fact that the Foxit solution works with all their PDFs—including those that are PDF/E compliant—was critical. As was our PDF software's easy deployment and top performance both at their offices and on mobile devices at construction sites.

To learn more about how Foxit's fast, affordable, and secure PDF solutions make the paperless office process efficient and easy to implement, read our case studies. Or contact us at 1-866-680-3668 or sales@foxitsoftware.com.