


GEORGIAN COURT UNIVERSITY
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Moving to a Paperless Society

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 **Cowan,
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Why Paperless?


- Improve customer service
- Improve workflow/file efficiency
- Increase productivity & profitability
- Attract & retain employees
- Mitigate risk

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Why Paperless?

- Knowledge management
- Reduce costs
- Long term availability of documents
- Shareable
- Ease of installation, operation & maintenance

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Paperless vs. Less Paper

- What goes/stays digital
- What goes/stays paper
- Operating procedures

What is Paperless?

- Content management
- Document management
- Records management
- COLD (Computer On-Line Documents) storage
- Microfilm storage
- Audio storage
- File room replacement

Considerations

- What types of documents are stored?
- Who needs to access them?
- What information is sensitive?
- Why is it needed?
- How long is the information to be kept?
- What is the economic life of the document?

Considerations

- Paper is expensive
- Management of paper is expensive
- Revolutionary change is difficult
- Resources are limited
- Requires a team effort
- Location of data files
- Hardware requirements

Considerations

- Storage requirements
- On-screen viewing
- Indexing, retrieval & security
- Private customer site
- Remote access
- Objectives
- Priorities

Life Cycle Management

- How long should the document be retained?
- Retention policy
 - Create a realistic retention policy
 - Enforce your retention policy
 - Store, backup, and management digital document formats

Electronic Record Management

- Records management program
- Records retention program
- Preservation of older digital records

Security and Privacy

- Restrict for privacy
- Restrict for security
- Different levels of security
- Appropriate level of security
 - Password
 - Encryption

Costs

- Software
- Hardware
- Scanning
- File room (on and/or offsite storage)

Keys to Success

- Leadership
- Discipline
- Focus on priorities
- Involve end users in planning
- Written standards, policies & procedures
- End-user training
- Urgent timetable
- Celebrate success

Prepare for Paperless

- Team
 - Champion
 - Technology Advisory Committee (TAC)
 - Project Manager
- Define requirements
- Prioritize needs
- Inventory current software applications
- Cost/benefit analysis

Prepare for Paperless

- Develop written plan
 - Timeline
 - Standards
 - Policies
 - Procedures
- Implement conversion
- Train personal
- Provide end-user support
- Review and update plan accordingly

The Paperless Culture

- Create right mind set
- Coping with cultural change
- Styles of imaging
- Conversion
- Implementation & training
- Reference materials
- Implementation guides

The Paperless Culture

- Define your objectives FIRST
- Match your objectives to the software & hardware solution
- Resolve internal conflicts upfront
- Make sure that there is one agenda
- Obtain buy-in

Change of Habit

- Avoid printing electronic documents
- Risk of multiple versions of the same document
- Keeping electronic vs. hardcopy
- Inconsistency of document storage
- No retention policy for electronic documents
- No procedure for deleting documents

Recommendations

- Train at high level
- Best practices for application usage
- Policies and procedures around best practices
- Annual assessments

Policies and Procedures

- E-mail
- Scanning
- Internet
- Calendaring
- Asset Control
- Fax
- Software
- Policies
- Procedures
- Accountability

Obstacles

- Resistance to change
- Leadership
- No plan/strategy
- Commitment to the project
- Department vs. company strategy
- Integrated systems
- Lack of technical & back office knowledge

In Conclusion

- Information revolution
- Competitive differentiator
- Strategic asset
- Investment in your company
- Increase Profits

A Final Thought

...the vendors & applications will not keep you from achieving your objectives, the enemy is you!

20% of the solution is the technology or tool. 80% is the process and behaviors.

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