

From Scan to Capture to Paperless

“We’re a paperless office!” If you can make this statement about your organization, it’s a great accomplishment and it’s generally the proof that you’ve optimized your processes and that you’ve taken a huge step forward in being a more sustainable entity.

But how can you become a paperless organization? How can you achieve this in a simple way? I think that being a full paperless office is very difficult to reach, but this article presents an approach that can allow you to get close to it simply and without affecting too much your ongoing operations.

As we have developed Librex, a paper scanning AND electronic documents capture system, we have often witnessed this type of transition in organizations, and we hence recommend you to implement it one step at the time.

Step 1) The boring step: SCAN your paper documents

For most organizations, paper documents are still very present in their day-to-day activities. This first step aims at stopping to build mountains of paper. Once your documents are scanned, they will be easily accessible for your users. I call it the boring step because scanning paper is pretty boring (adding barcodes or a good OCR tool will make it less difficult), but from this step, you already give your users an instant access to their documents. After a few weeks, they will never want to go back.

Step 2) The transformation step: Change your INTERNAL paper documents to electronic ones

Parts of the documents you have to manage are the ones you produce yourselves. Your purchase orders, your work orders, your invoices are all documents that could be produced electronically from scratch. You’ll be able to continue to manage your customer paper documents by scanning them (see step 1), but at least, you’ll stop producing them yourselves. To replace your paper documents, you could for example build an electronic form on your intranet, or of course implement this in your ERP system. If you want to continue having official electronic PDF documents instead of just data, you can feed the data to a good capture tool that will recreate those documents for you so that you can send them to your customers.



Step 3) The external step: Change your CUSTOMERS paper documents to forms

Provide a simple way to your customers to communicate with you electronically. For example, instead of having them send paper invoices, ask them to send electronic ones by email, or even better, provide them with an interface on your website to submit them directly. Again, link this interface to a good capture tool so that they can be captured, recognized and treated automatically.

Step 4) The automation step: AUTOMATE your processes

Now that all your internal and external documents are electronic, you have to possibility to optimize your processes and to build electronic workflow on them. Make sure that whatever the source is, the document is managed in the same way. For example, after your proof of delivery was signed electronically, connect it to your ERP system, generate automatically the corresponding invoice, send it to your customer automatically, receive their payment online, and connect the payment to your accounting system.

Step 5) The vacation step: Sit Back and ENJOY

With all your business documents being automatically processed, you may now sit back, enjoy it for a moment and then put back all your attention to growing your business.



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