

Going Green With EDM

Replacing your paper-based processes with an electronic document management (EDM) system can not only significantly reduce your company's paper and energy consumption, it can help you save money and even win sales.

Integrated Solutions, May/June 2009

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Going green is not just a laudable environmentally friendly goal anymore. Cutting your use of paper and reducing your carbon footprint will inevitably lead to reductions in your operational costs as well. While it may seem obvious that EDM solutions – which replace your paper-based processes with digital ones – can help you reduce your consumption of paper, printer and copier supplies, and storage space, as well as eliminate the need to shuttle paper to warehouses and among dispersed offices, cutting fuel consumption and emissions, EDM solutions offer much more.

EDM is not just a means to digitize your documents so your employees can access them from their desks and transmit them electronically to colleagues, customers, suppliers, and contractors. It also enables you to automate a wide variety of business processes and workflows, eliminating paper, postage, shipping, and hours of labor to hunt down, retrieve, and manually update or process documents. It can streamline your operations and provide much greater visibility of and control over key information. "Digital tracking of all file interactions in an EDM and workflow system also enables electronic audits that show who interacted with files at any given time and in what manner," notes Ron Prichard, president of Optical Image Technology, Inc. "Electronic audits and e-Discovery capabilities further reduce paper production and fossil fuels that might otherwise be wasted in auditor transit and visits to off-site storage facilities to locate requested files. Does your company have remote staff or clients who routinely have to travel to your office to access documents or deliver them? If so, secure self-service of digital documents or the ability to review, approve, sign, and return documents digitally via workflow will streamline company, customer, and staff expenditures of paper and fuel, not to mention the savings in time and added productivity."

Melinda Stoker, director of marketing communications for Xerox DocuShare, notes that there are numerous process automation applications or solutions that run on ECM platforms that can help just about any company in any vertical eliminate paper from its processes. "These include, for example, accounts payable invoice processing, insurance forms processing, court case management, school student registration process, mortgage/loans processing, customer self-service portals, healthcare authorization forms and other policy/procedures, human resources on-boarding, employee evaluations, etc., contract renewals, and records management, just to name a few."

IMPLEMENT 'PAPERLESS' PRACTICES ALONG WITH TECHNOLOGY

To be truly effective in meeting both your cost-reduction and green goals, you need to incorporate some key business practices along with your EDM solution and take proactive steps to avoid common pitfalls. First, according to Stoker, "Companies should choose a solution that provides a flexible, robust, scalable platform that works with commonly used systems including UNIX. It should provide the ability to ingest large volumes of paper [up to many millions of documents] rapidly and reliably and the ability to create workflows and process automation. Many of the most paper-centric processes that are repeated on a daily and weekly basis can be standardized and automated through robust content management software."

Make sure you purchase a system that's up to the task. "It's tempting to skip in the beginning by buying a low-end solution," Stoker continues. "However, companies find that the total cost of ownership over time can become higher than if they had invested in a scalable solution that will meet their needs as they grow. At first blush, some 'free' or 'hosted' ECM/EDM solutions look attractive, but if you study the features, flexibility, and scalability of these systems you might find they will not be able to handle the volume or the complexity of what you need unless you invest more in customization, added servers, etc. Make sure you have an all-inclusive solution out of the box."

Give some serious thought to how paper moves through your organization, and develop a workable plan for

eliminating it. "One of the most important things to consider is getting rid of paper as early in the process as possible," notes Prichard. "If documents can be created digitally [via online forms or bar code capture], no paper is created, and the data is immediately secure and available for processing. If files are scanned in a mailroom or office upon receipt, they are also made available quickly for digital distribution and quicker processing. If papers are worked on manually and simply scanned at the end of the business process, after all file interaction is complete, the real opportunity for eco-friendly business and cost savings has been lost. Whenever possible, capture or scan documents before the work related to them begins. If you are looking for a truly 'green' solution, find out whether the technology allows users to electronically print from their desktop directly into the system in common formats such as TIFF or PDF. This makes it possible for no paper to be generated at all, creating a truly green environment."

As with any new technology, training is important, but in this case, you'll have some additional obstacles to overcome, such as breaking ingrained paper-based habits and in some cases, eliminating fear. "All users need to be thoroughly trained on the system and understand that it is beneficial for them, rather than a technology that is meant to replace them," explains Prichard. "Users who are not adequately trained or are scared about position elimination may sabotage the implementation. Notification needs to be in place from the executive level down to the end users, demonstrating how and why the system is good for the company and its employees."

INDEXING CRITICAL TO ACHIEVING USABILITY

If you really want to go green, and not just add a digital component to your document management processes, you will need to make sure your solution is implemented in a way that does not encourage your employees to print documents as they process them. "One common mistake is scanning documents to get them in the system, then printing them to work on them and rescanning them, which creates unnecessary paper and wastes time," notes Prichard. "This often happens unnecessarily with emails as well. Emails related to business processes should be indexed and stored in the EDM system, used to launch appropriate business processes or to initiate requests electronically via a business process management system that follows your business rules. By doing so, there is no more need to print emails as a reminder of what to do next, and a lot of paper waste can be eradicated."

The first step to achieving a workable, paperless system is to thoroughly understand the documents your company has, the processes in which each document type is involved, and the people or job roles that use the various document types. "In order for an electronic document management system to function the way it is intended, people need to know they will find the information required for their jobs 100% of the time, without fail, which occurs as a result of thorough indexing," continues Prichard. "If people don't trust the system to provide accurate and complete information when they need it, they may replicate digital records with paper copies, defeating the purpose of electronic document management."

A logical, usable indexing system is the key to your employees being able to locate and retrieve documents quickly, and developing and implementing a well-conceived indexing plan for your digitized documents will require involving all of the people who need access to each document type. "Files that are indexed poorly or incompletely will fail to consistently deliver the information requested, through no fault of the technology," says Prichard. "Documents that are over-indexed using criteria that no one will ever need may result in unnecessarily slow performance of the EDM system, which will also frustrate users. One or two indexing criteria are not enough for most companies to index their documents so they can be found by a variety of employees who search for the same information in diverse ways. A good EDM system should be flexible and robust enough to enable indexing to be thorough. It should also have the capability to access other databases to populate relevant information on common forms [such as HR documents] so limited input is needed into the form."

Once you have robust scanning and indexing systems in place, you can enjoy the benefits of digital storage, including the associated cost savings. And while going green has lots of obvious paper- and labor-saving benefits, it might even help you increase your sales as well. "Numerous companies are now making it a priority to select vendors that are 'green organizations,' so by making improvements in reducing their carbon footprint, companies can gain access to opportunities with a growing base of customers who choose to work with eco-friendly companies," says Stoker. "An easy-to-use and deploy ECM system saves resources, team members are more productive and nimble, and customers are more satisfied because they are serviced quickly and accurately."