

It might be hard to believe that in today's digital world there are still organizations that are so enamoured with their paper tigers (i.e. paper-based operations and filing systems) that they continue to invest thousands of dollars on expensive filing cabinets and space to house them. For less than it takes to buy a couple of good quality filing cabinets one can purchase a [professional quality scanner](#) that can readily transform a lethargic and voracious paper tiger into a nimble and docile paperless pussycat. This article discusses how to finally do away with the arduous filing demands of your paper tiger by migrating towards a [paperless office environment](#) in which your paper files would get converted into digital files that can more efficiently and affordably be managed using a filing system on your office network.

Key Benefits

The following are just a few of the benefits that could be realized by transforming your paper documents to digital ones.

- **Reduced overhead.** Costs are drastically reduced by phasing out the labour-intensive paper filing and retrieval process and just phasing-in an all encompassing electronic filing system on the office network.
- **Instant digital file-sharing.** Once documents are scanned, named and saved they become digital files that are instantly shareable by everyone on the office network thereby eliminating the need to duplicate or handle any physical copies.
- **Better use of office space.** Eliminating the paper filing process reduces the need for filing cabinets and the associated prime office space required.
- **Improved efficiency.** More efficient operations result due to the fast and precise retrieval of digital documents for processing.
- **Automation friendly.** Processing can be more readily streamlined and automated using workflow and OCR-based technology.
- **Disaster recovery.** Files can be backed up to facilitate disaster recovery and to ensure continuous uncompromised operation in case of crippling disasters from destructive forces such as fire and water.

10 Tips to move from a paper filing system to a digital filing system

Phasing out a paper filing system and replacing it with a digital filing system can present some major challenges and have negative consequences if not executed diligently. The following 10 tips are recommendations that can help circumvent some of the more common pitfalls and also better ensure the success of your endeavour.

1. Establish a network-based filing system. Do not start scanning until you have structured a filing system on your office network that is suitable for all your business activities. In most cases the current structure of the paper filing system can be a suitable point of reference but may not be the best because computer filing system can and should be more flexible to make provisions for any type of electronic file (e.g. Microsoft Office, emails and attachments, graphics...).

2. Institute structured file naming conventions. Because the file resulting from a scan is generally a PDF file with a cryptic incomprehensible name; it is best to immediately store and assign a name as per the department's prescribed [structured file naming convention](#) or policy. E.g. **GlobalSupplies_56965_INVOICE_OfficeSupplies_2010-04-26.PDF**; or **SmithJohn_3544-05_Policy_Term5yr.PDF**. This would ensure fast and precise search, identification and retrieval of files by everyone. *Note: the most suitable individuals for naming and storing files are the individuals ultimately responsible for processing the document or a dedicated resource for the department.*

3. Use tools that enforce file naming policy adherence. The effectiveness of your computer filing system is a function of how quickly and accurately everyone can search, identify and retrieve files and that is a function of how well everyone adheres to the file naming and storage policies of the department. Fortunately there are [software tools](#) that enforce adherence to storage and structured file naming policies. By taking advantage of these it would be possible to better ensure the integrity and effectiveness of your digital filing system.

4. Use a distributed scanning strategy. For everyday operations it is preferable to use a distributed scanning approach as opposed to a centralized one. By providing a professional desktop scanner on the desk of the support staff responsible for the document they will be able to scan all pertinent paper documents without leaving their desk. The results will be better than if delegated to a central scanning service or resource.

5. Use high performance departmental scanners for large batches. For higher volume batch scanning especially of existing / legacy paper files, a higher performance departmental scanner would be most suitable due to the high volume.

6. Use flat-bed scanners if necessary. If many documents are tattered, a flat-bed scanner is highly recommended. If tattered documents are more the exception than the rule, the less expensive alternative is to photocopy the document and scan the copy using the automatic document feeder (ADF). *Remember to remove staples and paper clips at all times when using an ADF.*

7. Scan using the LIFO rule (Last-In-First-Out). The highest priority paper documents that need to be scanned are always the most current incoming ones because they require immediate attention. The older documents that are already filed in a filing cabinet can wait for a more convenient time.

8. Scan only useful documents. Obsolete or unessential documents / folders should be removed and excluded from the scanning process. This can be done at the time scanning or as a separate triage activity when dealing older files.

9. Scan older documents as per anticipated use. Existing paper files should be scanned in order of importance and also based on current or anticipated activity associated with the specific file.

10. Input tracking data for possible physical retrieval. In regulated industries where compliancy dictates that the original paper can not be destroyed for a set period of time, provisions should be made in the metadata portion of the digital file to include sufficient tracking information to be able to retrieve the original paper document from the precise physical storage location. E.g. **_Box 135_** *Note: Scanned paper documents should be inserted into the banker's box in chronological order of scanning.*

Conclusion

Deciding to phase out your paper filing system or to minimize the general reliance on paper is not always an easy decision; but certainly an extremely responsible one because as time progresses it will no longer be a question of choice but moreover one of operational necessity. It does take some courage to tame a paper tiger but there is nothing to fear if the project is planned and executed properly it can be entirely painless.

About the author: Vincent Santaguida is the CEO and founder of MultiCIM Technologies Inc., a software development company that specializes in business process automation. He was an active contributor to the design of [eXadox](#), a software tool that helps name, organize and manage scanned documents and computer files. He writes and speaks on subjects dealing with paperless office and information asset management strategies as a means of encouraging productivity.