Aiming for the Cloud-hosted paperless office

See Clearly Accounting Corp. (SCAC) of Vancouver, Canada, is a professional services firm that is owned and operated by Edward Wear, C.A. whose purpose is to provide productivity improvement solutions for small accounting firms and their clients. For several years SCAC has been undertaking productivity initiatives with a special focus on establishing methods for migrating toward paperless office practices. They have recently completed the deployment of the eXadox document management system. It is serving as a technological foundation for their paperless office solution.

Mr. Wear was always intrigued by how other accounting firms were reaping the benefits of going paperless; therefore, two years ago he decided to invest on professional office tools that came with an integrated paperless filing system. Unfortunately, they discovered that the new solution was not a good fit for the way they wished to operate and had to rethink both the tools and their approach. Mr. Wear recalls, *"… so I went searching on the internet for a paperless filing system, and found eXadox. I read all the material on their web site; it sets out what is required of a great system, and so I bought 3 copies of eXadox. "*

Although they were quite pleased with their eXadox purchase and overall progress, Mr. Wear wished to raise the bar even higher. He wanted to have paperless office applications hosted in the Cloud and be able to access files and operate virtually via the Internet. He opted for InsynQ-CPAASP Cloud hosting services that especially cater to accounting professionals. This presented another challenge because eXadox software was not certified for Cloud-hosting operation at the time; however through a collaborative effort between InsynQ and eXadox technical staff, See Clearly Accounting's Cloud-hosted paperless office was finally becoming a reality.

Paperless office planning

See Clearly Accounting's biggest overall effort was the actual planning phase. They had to review and realign their working process to complement a paperless office strategy. Paper documents would have to be scanned and electronically filed with eXadox as soon as possible to render them digitally accessible to all stakeholders. Provisions had to be made for just about every type of document associated with each of their business activities.

Typical eXadox implementations involve the creation of only two to five profiles to start with; however they wanted to execute a detailed and all encompassing action plan. See Clearly Accounting initially started with approximately two dozen profiles and later added several more. They wanted to ensure that the file naming structure had sufficient elements to precisely identify each document in terms of purpose and content. They made extensive use of list-field elements and built their lists with applicable content, in order to minimize keying when selecting folders and constructing file names.

Paperless office deployment with eXadox

The eventual deployment of eXadox was quick and smooth. See Clearly Accounting personnel were able to personalize the eXadox system themselves and satisfy their specific filing requirements. That meant that they had to create their own eXadox profiles to help them enforce the folder and file naming conventions (policies) for each of their business activities. Although they had the option to let eXadox consultants provide a turnkey deployment, SCAC felt quite confident that they can handle it. Mr. Wear assigned, Ms. Heather Tong, their office manager, with the personalization task. After a brief training session by eXadox staff, she instantly felt comfortable with the setup procedures. On several occasions she called for eXadox support with questions, but for the most part she worked
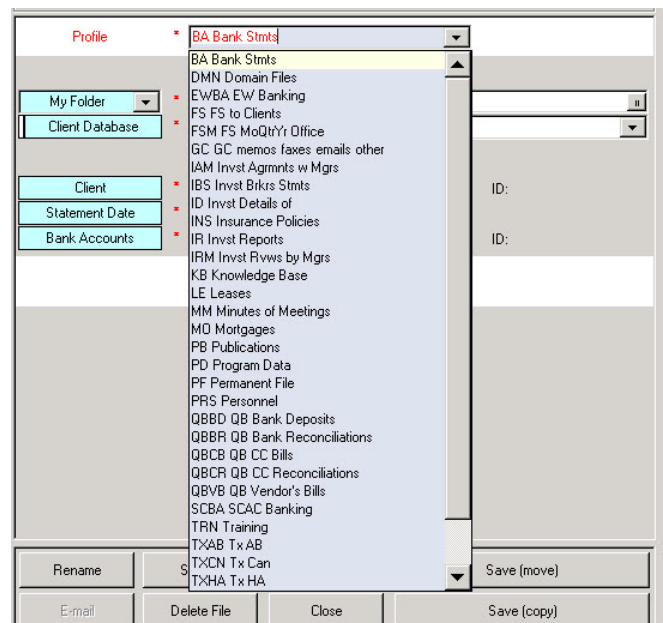

Fig.1: List of all eXadox profiles – courtesy of SCAC.

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autonomously. She managed to create and rework almost 30 profiles (cf. Fig 1) until they were in perfect alignment with the way they wish to operate and organize their electronic documents. Ms. Tong states, *"You can create as many profiles as you need to store all the different types of documents you have."*

What impressed Ms. Tong most was the relative ease with which she could create the various profiles and most of all: the flexibility of being able to easily personalize the profiles to fulfill her specific requirements in file naming structure. She enthusiastically explains, *"Within each profile you can edit the settings to how you wish the file name to appear* (cf. Fig.2)*. There is the option to create a Text-field or List- field within the file name. The List-field can be very useful if you are creating a profile which may have more than one type of document (example: emails, faxes, memos). Instead of creating 3 different profiles for each of these, they can all be included in 1 profile in a list to identify the document type in the file name* (cf. Fig.2)*. The list is also saved in the eXadox public folder so you wouldn't have to recreate it if you wanted to use the same list for another profile".*

File naming and storage via eXadox
Using the eXadox software was practically uneventful because the See Clearly Accounting staff found it sufficiently intuitive and user-friendly from the start. Ms. Tong explains, *"It only takes a few clicks to have the desired file name instead of having to type the entire name out manually. When you save the document, you can click the drop-down list* (cf. Fig. 3) *and it would show all the different types of documents that you set up. This can be set up so that it identifies what type of document it is in the profile name and makes it easier for the user. The content in the blue box* (cf. Fig.4) *is very helpful as it shows the folder that the file will be saved in, and also how the actual file name will look, so you have a preview and can make any changes necessary."*
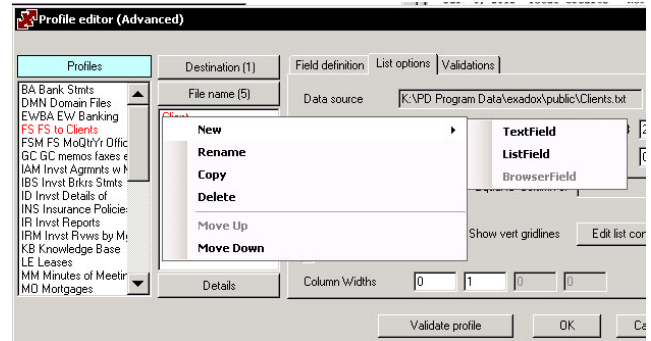

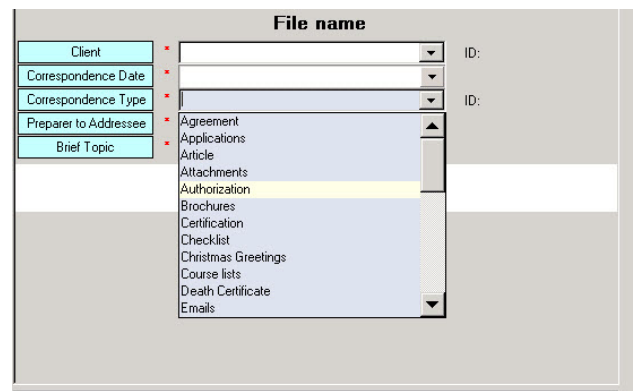**Fig.2: eXadox Profile editing- courtesy of SCAC**

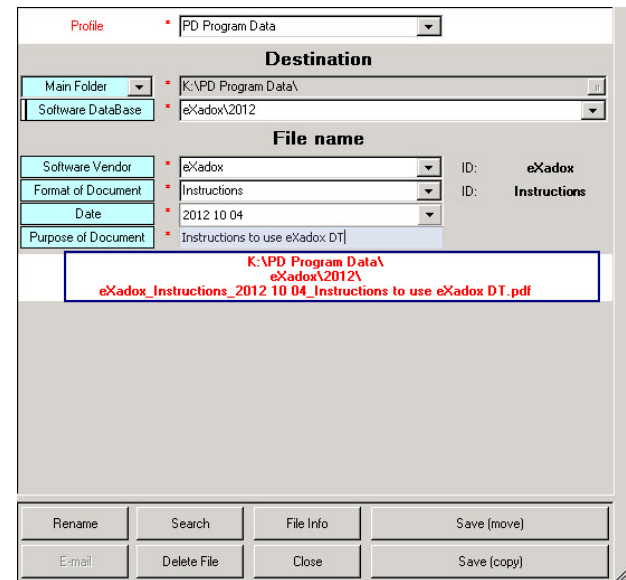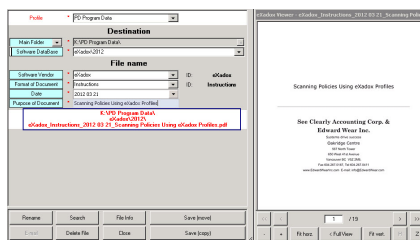**Fig.3: eXadox drop-down list-field- courtesy of SCAC**

Fig.4: eXadox folder and file naming - courtesy of SCAC

Fig.5: eXadox user interface including document viewer - courtesy of SCAC

Benefits of eXadox paperless office solution

Today See Clearly Accounting Corp. is benefitting from the fact they are able to operate more efficiently because all electronic documents are instantly accessible virtually from anywhere there is an internet connection. When Ms. Tong was asked specifically on how eXadox has benefitted them, she provided the following list:

1. *Saves a lot of time with saving and naming files.*
2. *No need to manually type in a file name each time.*
3. *Keeps documents organized and set up with the same format (example: we prefix all client documents with an abbreviation of the client's name so that it is easy to identify if the document has been misfiled).*
4. *Ability to create profiles for virtually all types of documents.*
5. *User-friendly and very easy to use.*
6. *Lists only need to be created once and can be saved for future use in another profile.*
7. *Settings can be adjusted so that all documents scanned automatically go into the inbox where they will show up as a list when eXadox is opened; no need to reopen each file after scanning just to confirm what it is.*
8. *eXadox viewer shows a screen of what you are saving so you know exactly what kind of information you want in the file name.*
9. *Ability to delete the file in eXadox if it was not meant to be scanned.*
10. *Profile elements can be set up so that whoever is looking for a file can identify what it is right away just by looking at the name without having to open the file to check.*

Conclusion

Using eXadox paperless filing solution in combination with InsynQ-CPAASP Cloud-hosting provided a solid foundation to build a Cloud-hosted paperless office for See Cleary Accounting Corp. The technological components were no doubt essential; however it was the vision, leadership and commitment of Mr. Edward Wear, C.A., Ms. Heather Tong, and their dedicated staff that made their virtual paperless office a reality and a major success.

About the author: Vincent Santaguida is the CEO and founder of MultiCIM Technologies Inc. He was the driving force and principal architect for eXadox™ , a software tool that helps name, organize and manage electronic documents and computer files. He writes articles and speaks on subjects dealing with paperless office and information asset management strategies as a means of encouraging productivity.

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