

THE PAPERLESS OFFICE

PRESENTED BY WENDY BULLOCH

(SECRETARY OF THE SCHOOL BUSINESS MANAGERS' ASSOCIATION)

CONGRATULATIONS!

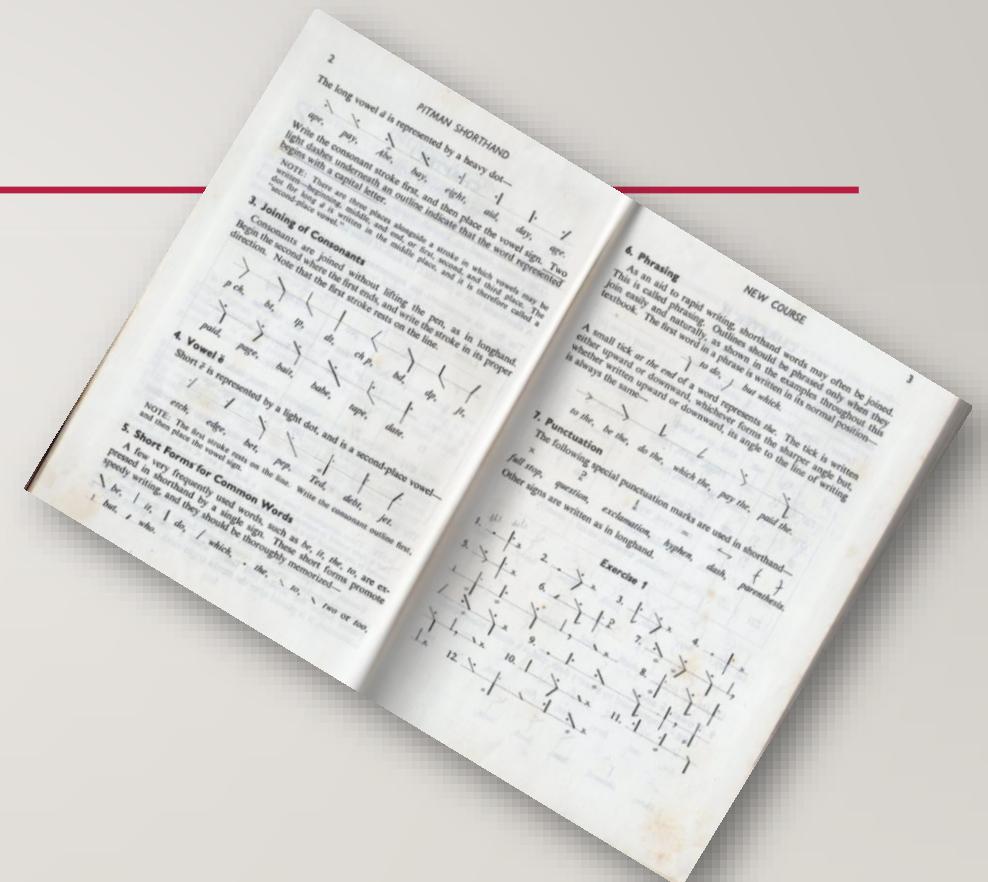
**YOU HAVE CHANGED YOUR THINKING FROM
“I CAN’T!” TO “HOW CAN I?”**

INTRODUCTION

A LITTLE ABOUT MY WORK HISTORY

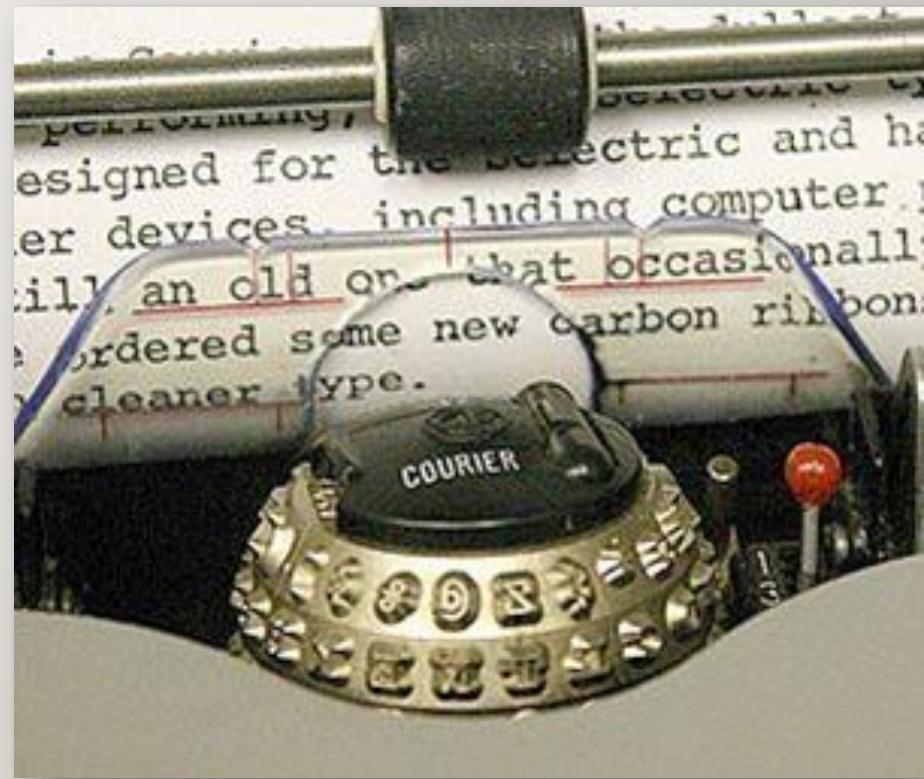
SHORTHAND TYPIST

I started my working career in 1974 as a Shorthand Typist. The tools of my trade were a typewriter, notebook, pen, typewriter, paper, ink rubber.



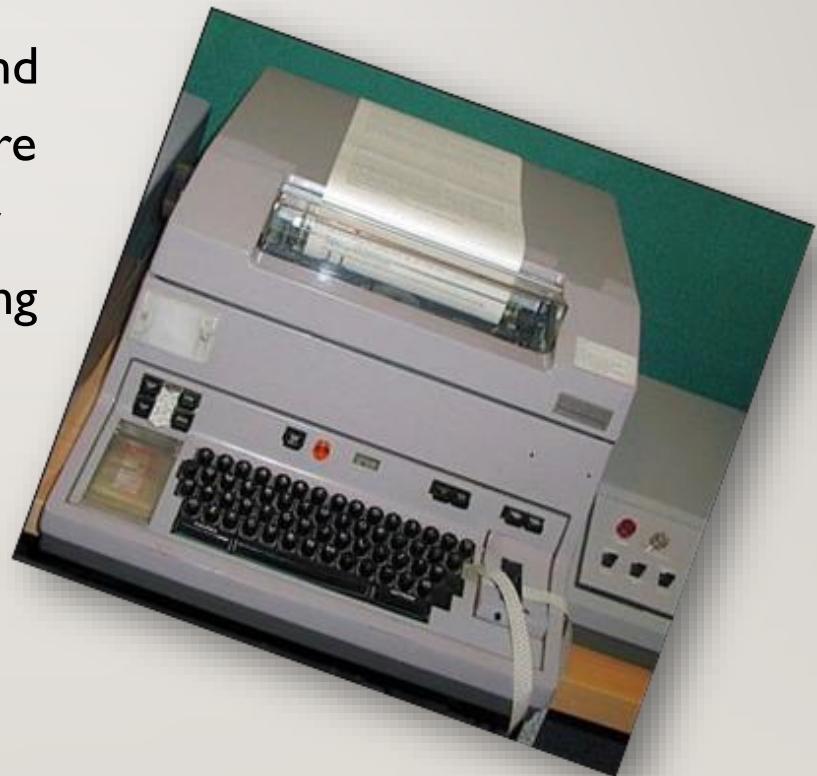
TYPING POOL

A year or so into my job our head typist got a newfangled ELECTRIC typewriter. It was a golf ball one and we were allowed to practice on it during our lunch break.



TYPING POOL - TELEX

The Telex Machine connected us with other Inland Revenue offices throughout the country. We were amazed that we could see the messages instantly as the person at the top of the country was typing a message to us at the bottom of the country.



LEDGER MACHINIST

As an Accounts Officer at the Inland Revenue Department part of my job was to enter ledger balances into a “Burroughs” ledger machine. We manually balanced the personal tax accounts of taxpayers in the Wellington Central region every 6 months using these machines.



MANUALS OFFICER – MINISTRY OF TRANSPORT

Working in the Manuals Section of the Ministry of Transport (Head Office) I edited the operational manuals for the various branches of the MoT (Civil Aviation, Marine, Road Transport, Rescue Fire, etc.)

We “physically” cut and pasted original documents using a light box and cutting knife.

SCHOOL SECRETARY

Along with our “clunky” computer, we raised the bar when we purchased a fax machine.

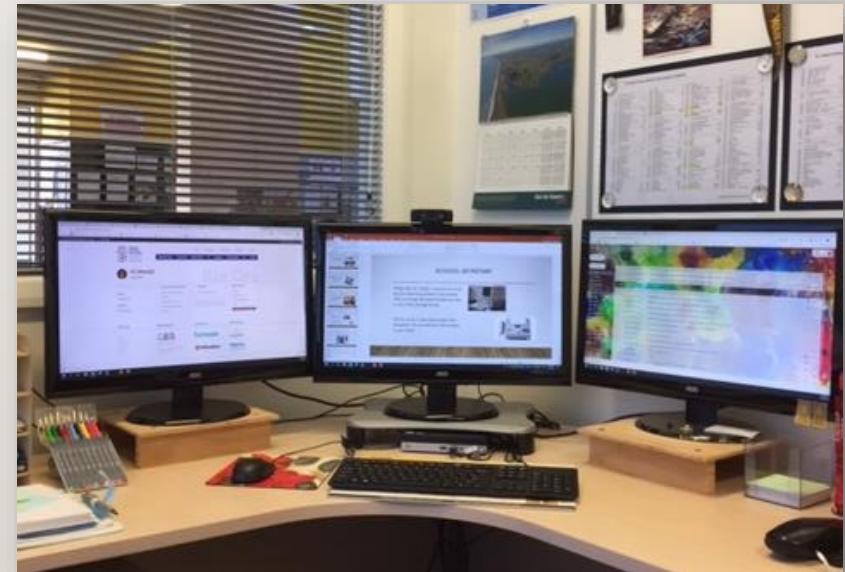
Who can forget the myriad of jokes we sent to each other through the fax.

The fax seems to have lasted longer than anticipated. Do you still have a fax machine in your office?



SCHOOL BUSINESS MANAGER

All-in-One Computer, 2 extra monitors, and a scanner are now the tools of my trade.



WHAT DO YOU PRINT AND STORE?

Draw up your page to look like this:

WHAT DO YOU PRINT AND STORE?

- Make a list of everything you personally print at work.
- Add the paper you receive from others to file in your records.
- Add the paper you send to others to file in their records.
- Head the two columns on the right “Paper” and “Digital”.
- Put a tick in the appropriate column beside each entry showing which you should keep as a paper record and which you can save as a digital copy.
- Put this list aside for the moment.

WHY DID I GO PAPERLESS



WHY DID I GO PAPERLESS?

Archives

My school has been in operation for only 11 years, which is not too long compared to others that have been around for a century or more. Although it has only been 11 years, the amount of paper in our archives is incredible. The archives are stored in the loft and although they are filed in year order, it is a mission to find particular paperwork should the need arise.

Now that I scan and save my documents, the only space this takes up is in the cloud and in my backups.

WHY DID I GO PAPERLESS?

Office Space

Ringbinders, folders, filing drawers, etc. etc. To hold these files I required a wall unit, a filing cabinet and extra desk space. If you are fortunate enough to have a large office that's probably not a problem for you. I, however, have quite a small office and felt hemmed in by furniture which was there just to hold records.

I now have NO wall unit, NO filing cabinet, and a lovely café table and chair for visitors to comfortably sit and talk with me.

WHY DID I GO PAPERLESS?

Efficiency

Using the Google Suite throughout the school has increased efficiency throughout the school in many areas - communication, collaboration and information sharing to name a few.

The first document I transferred from paper to the computer was the school order book. I have only had one book in the school and as you are probably well aware, the book doesn't get completed as often as it should due to the physical location of the book.

My Order Book is now an e-Order Book.

WHY DID I GO PAPERLESS?

Speedier Audit

My Auditor spent 1 hour with me going over the usual checklist. Sighting of documents was the quickest part of the audit. I could call up any document they required (approved invoices, signed SUE Reports, approved staffing changes) and at the click of a button the Auditor had the information.

I also copied the relevant documents, leases, Analysis of Variance, etc. into a folder and downloaded it onto a USB drive for them to take away with them.

HOW FANATICAL AM I ABOUT BEING PAPERLESS?

Although it is quite PC to be “Green”, going paperless was not motivated by my wish to save the environment, however, that is a positive by-product.

I wanted more efficiency, more space in my office, and a nicer environment to work in and meet with people.

I have all that now.

HOW DID I START?

- The first action I took was to contact my Auditor and my Accounting Service Provider advising them I wanted to go paperless and asking if they could see any reason why I couldn't.
- The Auditor was thrilled that I was looking at going down the paperless track and encouraged me to investigate the software, systems and processes required.
- My Accounting Service Provider had absolutely no problem with the plan I had.

WHAT RESOURCES DID I NEED?

- A new mind-set
- Digital Signature programme
- Scanner
- An organised computer filing system

A NEW MIND-SET!

The hardest challenge to overcome when starting to organise yourself is your mind-set. It's amazing how it has become a habit to print out a document prior to looking at it. When you start going paperless, pretend your photocopiers are down and you need to send a document to Novopay, a signed copy of a lease agreement, or obtain a signature on board minutes. Forget paper copies – do everything digitally!

When discussing the whole paperless issue with colleagues, most were reluctant to go down this track as they like to scribble notes on paper when reviewing or starting a document. By all means do this if that is your preferred way of working, but once completed, scan the document, file it in the appropriate area, then throw away the paper copy.

DIGITAL SIGNATURES

- Almost every document that ends up being filed has some sort of authorisation on it. SUE Reports are signed by the Principal, leases require signatures, invoices are coded and authorized by budget holders. You name it, it requires some sort of signature and/or text.
- My Auditor indicated they would be happy to see documents signed digitally so I searched for a programme that would enable me to not only obtain signatures, but also be able to add text to a document.

DOCUSIGN

- After researching programmes, I purchased a licence from DocuSign for an annual subscription of \$383.00 (Basic Plan).
- This programme allows me to obtain signatures from as many people as I require. Additional licences would be required if anyone else in your school wanted to initiate the signature process.

SCANNER

- I then purchased a personal scanner which sits on my desk. It only measures 28cm wide and 26cm deep when open and ready to accept paper.
- If your photocopier scans and sends to your email address that is another option. However, once you start scanning everything it is much easier to have a personal one sitting on your desk.

AN ORGANISED COMPUTER FILING SYSTEM

I can't express enough how important it is to have an efficient filing system in your computer. You are the one using it, so set it up the way your mind would look for a document. It could be as simple as having the following MAIN folders:

- Administration
- HR
- Finances
- Property
- Board

ORGANISE YOUR COMPUTER FILING SYSTEM

Within those folders add your sub-folders, e.g. within Finance you could have:

- Bank Accounts
- Ministry Funding
- Audit
- Budgets
- Accounting Service Provider

SCANNING AND NAMING DOCUMENTS

DocuSign will only accept PDF's. Most invoices and documents received via email are in PDF format, but if they are not, save them as a PDF.

How you name your document is extremely important. When saving invoices, I follow the same naming procedure – Office Max 190701 \$153.26 1330. This breaks down as an Office Max invoice dated 1 July 2019 for \$153.26 and is being coded to budget code 1330. This is for my benefit and system only - you can name them as whatever is best for you.

You will see the benefit of naming the document this way later.

SCANNING AND NAMING DOCUMENTS

Other documents are named according to what they are, e.g. 2019 Operating Grant – April. This is how I name them, but remember, you name it with a system or naming protocol you are familiar with. You are the one going to be looking for the document after all.

SAVE SCANNED DOCUMENTS

I have set my personal scanner settings so that anything scanned goes straight into a folder called (of all things) “Scanned Documents”. This documents in this folder take the place of the hard copies that used to sit in a tray on my desk waiting to be actioned.

I have another folder on my computer called “To Be Signed”. The documents that need to be signed get dragged into this folder.

Documents that are scanned and saved in the “Scanned Documents” are dragged to wherever appropriate.

CONVERTING SCANNED DOCUMENTS

Almost all of you should be able to save a document as a pdf, but if not, you can convert documents using Zamzar (www.zamzar.com).

Go into the site, upload the file you want converted, send it to Zamzar and they will send it back to you in the desired format.

OTHER PAPERLESS DOCUMENTS

- Landing Page (Internal School Directory of Documents/Notices)
- Shared Documents
- Calendars for Rosters / Meeting Room Bookings / Library Schedule / etc. etc.
- Minutes of Meetings – Team Meetings / Admin Meeting / Senior Leadership
- Reimbursement Claim Forms
- Dirty Work Allowance Claim
- Leave Forms
- Relief/Absent/Extra hours for Staff Notifications

LEAVE FORMS

Staff can go into what we call a “Landing Site” which is a shared document with links to all forms and documents in the school. They can open the Leave Form and are immediately advised they are to make a copy of the master and use the copy. Once they have entered the details, the form is printed and given to the Principal to approve the leave.

I receive the form and record the leave (if granted). I make a calendar entry into my Reporting to Novopay calendar. I scan the signed Leave Form and file it in the personnel file (digital) for that person.

The hard copy then goes to the Assistant Principal to record in her records if there is a need for a relief teacher, etc. then that copy goes to the relevant staff member.

REIMBURSEMENT FORM

As with the Leave Form, staff go into the landing site and click on the Reimbursement Form.

Once details are completed, they can either print out the form or scan receipts and send the scanned documents to me for reimbursement.

DIRTY WORK ALLOWANCE

Once again, a shared document has been set up on our Drive. Staff who have performed duties which entitle them to the Dirty Work Allowance enter the details on the document. I then check these each week and notify Novopay.

When Novopay have been notified, I shift that data to the bottom of the document so staff members know it has been actioned, and can add new claims to the top of the document.

MINUTES OF MEETINGS

Senior Leadership, Administration, Team, Health and Safety, - you name it, minutes of these meetings are shared with everyone on staff.

They are NOT printed out – they are shared documents accessible on our Google Drive.

RELIEF/ABSENT/EXTRA HOURS FOR STAFF

I have set up a calendar dedicated to reporting to Novopay. In that calendar I place:

- Absences/Relief Teachers/Extra hours as advised by the Principal and/or Assistant Principal.
- Leave as per Leave Forms shared with me.
- Any other notification affecting pay, e.g. Increment Dates.

RELIEF/ABSENT/EXTRA HOURS FOR STAFF

I use this calendar when reporting to Novopay. The reporting is made much easier if you operate with two monitors. On one monitor I have the open calendar, on the other my Novopay site.

I enter to the Bulk Timesheet and Leave screens from the calendar, and change the colour of the event to show I have recorded it.

This calendar is also shared at the Senior Leadership meeting so they are aware of any upcoming absences, etc.

WHAT DO YOU PRINT AND STORE - REVISITED

Take another look at the list you prepared at the start of this workshop. Do you want to change anything?

PROGRAMMES TO AID THE PAPERLESS OFFICE

- Google Suite (Doc's/Sheets/Calendar)
- Payroll Toolkit
- Kindo
- DocuSign

THE PROCESS

The next page has a video showing the process involved in receiving, saving, and certifying an invoice.

00 Invoices received via Email - E-Order Book - Google Sheets

https://drive.google.com/drive/folders/1L1v3gCNXRLE47vLH20PETPFbzvLdmGW

Search Drive

My Drive > School Business Managers > Paperless Office Workshop > 00 Invoices received via Email

New

My Drive

Shared drives

Shared with me

Recent

Starred

Bin

Storage

31 GB used

Name ↑

Name	Owner	Last modified by me	File size
email-doc.aspx.pdf	me	17 Jun 2019	26 KB
Food for Staff.pdf	me	10 May 2019	50 KB
Rubberband Airlines.pdf	me	10 May 2019	48 KB
T_PRODUCTIONOFFICEMAX_DAILYFORMATTOFFICEMAX_DAILYINV_STMT.PDC 1.pdf	me	21 Jun 2019	27 KB

Te Totara PRIMARY SCHOOL

9:57 AM 02/07/2019

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- CSG for providing the USB sticks for your workshop notes.
- School Business Manager's Conference Committee for suggesting this workshop.
- You – for attending.