

# The Paperless Office

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## SUMMARY

Becoming a paperless office begins with defining a system for scanning and archiving specified office communiqués. Tips to help a firm define and implement a paperless office are included below.

## MAKING THE TRANSITION

Becoming a paperless office is not as futuristic as you might think. Tate Snyder Kimsey Architects has been virtually paperless since 1997.

## DEFINING THE SYSTEM

Follow the steps outlined below to get started using less paper in your office.

1. Form a staff planning team. Include staff from disciplines such as information technology, quality control, project management, and administration.
2. Develop a flow chart of all communication that comes in or goes out of the office, including phone calls and e-mail.
3. Establish guidelines for the filing system. Our staff planning team agreed on the following:
  - Scan all incoming and outgoing documents that are 11" x 17" or smaller, including phone records and all project-related documents.
  - Do not scan CAD drawings or specifications already created and stored electronically. Establish guidelines for archiving these electronic documents on CD-ROM.
  - Do not scan shop drawings, other submittals, or samples. Do scan all transmittals that record the receipt and issuance of submittals to and from other parties.
  - Scan all financial and contractual documents not already created and stored electronically. Protect these documents with passwords.
  - Establish a firmwide policy for scanning and archiving.

## IMPLEMENTING THE SYSTEM

4. For hardware and software, you will need a scanner and scanning software (we use Laserfiche); an electronic document numbering system to stamp and date all items (we use a machine by Simplex); and software to distribute via e-mail, within one hour, electronic copies of all scanned documents to their intended recipients.
5. Develop a template to assist in searches. Our initial template consisted of document number, project number, document type, date, description, sender, and addressee. We also developed a word search feature.
6. Provide for daily system backup. This may seem excessive, but it will keep to a minimum (one day's worth) the number of documents that must be rescanned following a system crash.
7. Establish guidelines for short-term retention of paper documents that have been scanned. Our retention period is four months.
8. If your volume of documents is large, consider hiring a document control clerk to scan the documents. Our 60-person architectural firm has about 45 projects in progress at any given time. The clerk's time is charged to the projects.
9. Develop electronic filing procedures and then train all staff to use the system.

Will our electronic files hold up in court? According to our legal counsel they will, because documents cannot be altered without detection once they have been scanned as TIF files. Consult your attorney for advice and guidance.

## RESOURCES

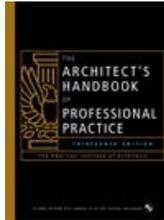
### More Best Practices

The following AIA Best Practices provide additional information related to this topic:

- 10.01.02 Project File Organization
- 10.01.04 Quality Control: A Project Record Retention Checklist
- 10.01.06 Fundamentals of Record Retention

### For More Information on This Topic

See also “Information Management” by Elena Marcheso Moreno, *The Architect’s Handbook of Professional Practice*, 13th edition, Chapter 13, page 380.



See also the 14th edition of the *Handbook*, which can be ordered from the AIA Bookstore by calling 800-242-3837 (option 4) or by email at [bookstore@aia.org](mailto:bookstore@aia.org).



### Feedback

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### Key Terms

- Practice
- Information management
- Firm management automation
- Computerized information management

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