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Integrated Job Costing Systems and the "Paperless Office"

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Environmental concerns and economical considerations have in recent years created a big drive in the pursuit to create a "paperless office". It seems to make little sense in an environment that is hugely based on computers, software systems and real time correspondence to rely on sheets of paper and on the bottleneck of physically transporting them from one location to another. This rationality appears to be backed up by the factual wastage of printed papers in offices. Research in commercial environments (both public and private sector) in Europe* has shown that around 25 % of paper materials, that are printed out, went to the bin more or less straight away. In small companies this ratio was even higher at about 50 % of paper wasted, impacting both on the environment and the costs to the business.

Creative agencies are no exception to that. In addition to the economical and ecological effects paper based work has for their project management, there is also an impact on the effective use of time, due to the way paper needs to be filed.

Take the example of a supplier invoice: Traditionally this document would have been filed in a supplier folder with a copy of it or a note with it's details in the job bag for which it was used. If the invoice covered costs, relating to several jobs, then more copies or notes would have been filed. Either way whenever project managers needed to look at cost details or originals for their jobs it was necessary to search in several different folders wasting hours of valuable staff time.

This time can be saved if one is able to find these details on one job and drill down to the supplier invoice or the other way around look at the supplier invoices and drill down to the jobs they were incurred for, easily accessing all the information electronically.

Having introduced an electronic job costing and accounting system is already half way to the realisation of a paperless business. All the documentation initiated and generated internally on the system is stored electronically and can at any time be redisplaid, pdf-ed and emailed or - if absolutely necessary - printed.

There will still be external documents to be received in paper form, but those can be scanned and stored electronically as well, giving everybody easy access to redisplay them on their computers when looking at the project details in their job costing systems.

It will - though - be difficult to electronically convert the details of external paper documents i.e. Purchase Invoices into computable data on the own system. Taking aside the imperfections of OCR systems, even if the documents arrived in electronically readable format (e.g. text tables), this format generated by the suppliers systems might not be compatible with the format required by the recipient's. However in most cases details will already be in the system as the purchase invoice would have been triggered by an order created for it and on arrival been linked to this order containing all the details. If the external document is then available electronically, even just as a graphic (pdf) file, it can be further used for example for an approval process: Rather than sending paper invoices round the office to have them signed by the order initiators (with the risk of those legal documents being temporarily or permanently lost), the approval can be performed online. The originator of the order is sent details of the purchase invoice displaying the invoice values and the order values. If all the values agree and the goods or services match the ones ordered, the approval might be given straight away. If there is a difference, the invoice pdf can be interrogated to find out where the difference comes from. It can be queried and put on hold, if there are disagreements in subject or be approved if the difference is caused by an

acceptable item (e.g. postage or transport charges added to the costs of goods).

The purchase invoice sample is just one of many of how the paperless office can improve efficiency in an agency in addition to reducing the costs to the business and environment. Agencies who have introduced this kind of electronic procedure have all experienced an increase to the workflow and thus profitability of their businesses.

* (lexmark.com/vgn/images/portal/Professional_wasters.pdf)

© 2008 Volker Bendel - Volker Bendel is manager of the training department of Agency Software Worldwide, the producers of the "Paprika/Rebus" job costing software (<http://www.paprika-software.com>) and (<http://www.rebus-software.com>). Originally from a legal background, he has several years experience in planning and implementing Job Costing and Accounting Software Systems in the Creative Industry. He has also delivered training courses in the UK, Europe, Dubai, the US, China and Australia. Prior to that he worked as a senior business consultant in Hong Kong and as a department manager of a design department in Hong Kong.

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