Profile in Green

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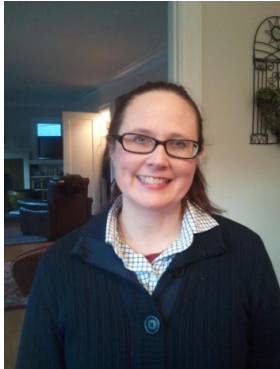## Abby Larson

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Keeping Records Paperless

Tips and resources

- Think about what you want to print

- How can you print the least amount?

- Assign printing goals

- Track printed paper monthly

Resources

Paper Conservation
http://green.washington.edu/paper-conserve

Green Purchasing
http://f2.washington.edu/fm/ps/green-purchasing

Email questions to:
savepaper@uw.edu

What was the driver for this initiative?

I personally wanted to use less paper, and I also wanted my records to be more accessible to staff.

What did you do to achieve your goals?

I made my PDF-creating option my default printer. Whenever I went to print, I had to choose to make it a piece of paper; otherwise it would automatically create a PDF for me to save.

I communicated my preference for paperless communication to staff.

I unplugged my printer, unplugged my student's printer, cancelled my fax line and notified the one vendor who must fax that they needed to find another way to send me documents.

I moved supply requests to an online form which automatically saves requests in an excel spreadsheet.

I moved my paper purchase record documents into my departmental folder on our administrative network, by scanning and printing to PDF. Each purchase gets its own uniquely named folder, and included in that folder is the original purchase request, proof of delivery (signed packing slip--scanned to PDF- or substitute), and vendor's payment receipt, and any other correspondence.

Were there cost savings or other benefits?

The new supply request system removes record-keeping and filing steps for my office and creates an easily searchable set of records. Besides saving on paper and ink, we saved electricity, fax line charges, staff time, copy services ISD, mail room handling, and office space. I never get paper cuts anymore; I've saved on band-aids too!

Suggestions and recommendations for others looking to implement a similar program

Standardize your filename conventions as soon as possible! Also, I name my files so that most information (budget numbers, dates of the order, supplier name, order numbers, transaction ID numbers, EI numbers, etc.) is visible when I open the folder. This makes things more searchable, too.

Also, set up your computer so that your files are organized and it is easy to work on. I created a shortcut to my network folder on desktop. I now work a lot more in my network files. I leave a little room around my open windows so I can see more shortcuts. A second monitor has been very helpful. Windows 7 half-screen options are very nice as well.

Profile in Green

Links

Environmental Stewardship & Sustainability
http://green.washington.edu

Records Management
http://f2.washington.edu/fm/recmgt/

How do you measure success? How are you performing?

I went from using a case of paper a year to only a ream of paper a year. I simply don't have printing needs anymore. When I do need a hard copy, I use the shared multifunctional device one floor up.

Did you experience any barriers? If so, how did you overcome them?

My emails are the majority of my purchasing records. PDFs are currently an acceptable format for most legal documents, used widely by businesses and the federal government.

I currently use Google Apps for my email program, which does not offer a way to save emails as PDF files. So, I needed a way to make my emails and any other odd format documents into PDFs, or an acceptable substitute for 'printing' my emails and the vendor order confirmations/receipts that were just web pages to print. However, our IT department does not supply or recommend a PDF writer ("print-to-PDF driver") to those of us without Acrobat. I researched free PDF writers and downloaded one through CNET at my own risk.

Scanning documents to PDF: My little desktop inkjet multifunction would only scan to .png or .jpg, and not to .pdf. In order to make a PDF, I had to click 10 or 12 times. I learned in my Records Retention class that these files are not accepted by state as good records, but PDFs are. I'm hanging on to my hard copies, filed by month. All records that originate as digital, though, stay digital.

What's next on the horizon?

UW Records Management will be publishing a scanning best practices document on its website soon, scheduled to be published on *March 16, 2012*. Records Management also plans to offer trainings on scanning best practices.