

Digitech Systems Whitepaper

Simplify Remote Work with the Right Technology Stack

As companies rushed to enable remote work during 2020, many discovered their existing technologies simply couldn't keep up with the efficiency, collaboration, and security needs of their businesses. Yet, employees continue to express a strong preference for flexibility in working locations. Companies must improve their workfrom-home (WFH) capabilities in order to attract top talent.

In this whitepaper, you'll learn:

- What's happening with remote work and why it is growing in popularity
- Why scanning, cloud-based document management, and process automation are essential to effective remote work
- Which key features you'll need to keep information secure while enabling work at home or on the road for your employees





Were you prepared? When the worldwide COVID-19 pandemic hit in early 2020, how much effort was required for your organization to send workers home so they could comply with government orders to shelter in place? Hours? Days? Weeks? Perhaps you're still smoothing out the "rough patches" as you struggle to help your stay-at-home workers become truly effective so your business can operate at normal or nearly-normal levels.

Regardless of where you found yourself when it started, and where you're at now, the worldwide pandemic put a spotlight on a work flexibility issue that has been quietly present since early in the millennium. Many workers prefer to work at home either all or part-time, yet employers have been remarkably reluctant to enable remote work situations. Now that we've had to do so, most businesses are surprised at just how effective remote work can be, and many previously reluctant workers now express a preference for flexibility in work locations.

As we all adjust to a post-pandemic reality, you need to understand how important WFH will be to your ability to find and retain talent. You'll also need a basic understanding of the technologies that enable employees to effectively access and work with business information no matter where they're located, and the features and capabilities that will help you distinguish which applications are right for you.

Market Overview

What is the remote work marketplace? Originally called telecommuting but more commonly called work from anywhere (WFX) today, remote work happens any time you have an employee performing work tasks from a non-work location. Common examples include working at home and working on the road from hotel rooms or customer locations. This often involves the use of company equipment like a cellphone and laptop or tablet that is used to access company devices and systems via the internet.

A Growing Opportunity

PwC found that roughly half of all companies intend to make remote work a permanent option for employees while also working to improve the experience for workers.² It's a wise move, as several surveys indicate that the majority of workers (typically around 2/3) would prefer to have the option to work at home at least occasionally going forward.

of knowledge workers think the office will disappear by 2030.

Drivers of Growth

The growing popularity of telework options is being driven by three primary market factors. First, younger generations are making employment decisions based on the flexibility of company's job structures. Second, cloud will continue to dominate the technology landscape as it has for the last ten years. Finally, the COVID-19 pandemic introduced many workers to work at home, and they like it! Let's take a closer look at each of these drivers of market growth.



Trend One: Preference for Job Flexibility

Statistics from Global Workplace Analytics indicate that 43% of working adults have been working from home at least part time for some time, and job flexibility ranks highly on lists of desirable workplace benefits particularly for younger workers.³ In fact, only 19% of workers have no interest in working from home.⁴ Today's jobs lend themselves to flexible work arrangements. According to a report in *CMSWire*, nearly half of all jobs in the United States can be performed from home.⁵

There are benefits for both companies and individuals to a remote work setup. Based on estimates from Global Workplace Analytics Telework Savings Calculator, a single company can save \$11,000 annually for each remote worker who telecommutes at least 50% of the time. Many individuals prefer working at home when they really need to focus on a difficult task such as problem solving or creating something from scratch (i.e. writing content and coding software), because they have fewer interruptions. Remote workers are happier, feel more trusted and less stressed, and are more loyal to their employers than their office-based counterparts.

Trend Two: Prevalence of Cloud

Cloud has dominated business technology strategies for the last ten years, and most analysts agree that the trend will continue. In fact, CNBC's annual survey of 15,000 business leaders ranked cloud as the number one priority for 2020.⁶ Four underlying factors have kept our focus on cloud technologies:

- The amount of data businesses manage is exploding.
- 52% of companies find better data security in the cloud ⁸
- 87% of companies who invest in cloud improve process automation
- Cloud investments return 3.2 times the value of their on-premise counterparts.9

It's no wonder that 83% of workloads were estimated to be in the cloud in 2020!¹⁰ What does cloud have to do with remote work? Quite simply—it makes it easier for employees to access applications and information from remote locations. Cloud services are hosted in datacenters and users access them via the internet, making any location with internet accessibility a potential work site.



If just **half** of US professionals stopped **commuting** to work and started working **remotely, 50 million tons** of greenhouse gases would be saved from entering the **atmosphere.**⁵



Trend Three: COVID-19 Pandemic

In 2019, the world was impacted by the first global pandemic in a century. Not since the 1918 flu epidemic have so many lives been impacted around the world by a threat to health and public safety. During the pandemic, many governments ordered shelter-in-place orders forcing non-essential businesses to close or to find alternative ways to enable work without requiring direct human-to-human interaction. Within a few months, hundreds of millions of individuals across the planet were transitioned to working at home—many with only a few days of notice to prepare.

This prolonged WFH experience has had a significant impact on the outlook toward remote work for both employees and employers. More than 40% of workers indicate a preference never to return to traditional office-based work and instead work from home full-time going forward.¹¹



Ultimately, business results will drive a widespread shift toward remote workforces, and the benefits of enabling flexibility are clear. In a roundup of remote work studies, *Business2Community* reports the following benefits:

- Employees who work remotely at least one day a month report being 24% more likely to be "happy and productive."
- 85% of companies believe flexible work has made them more productive.
- 77% of people working remotely believe it will lower their company's costs. ¹²

"Businesses save an average of \$11,000 per half-time telecommuter per year. The primary savings are the result of increased productivity, lower real estate costs, reduced absenteeism and turnover, and better disaster preparedness," according to Global Workplace Analytics.³

Critical Technologies for Effective Remote Work

The inadequacy of their information access and collaboration tools to remote work surprised many companies when they sent so many workers home during the COVID-19 pandemic. Think about the ways you use information and collaborate with team members in the office. Lots of information is shared in hallways and kitchens in between other tasks and many, if not most, decisions take place in office doorways or over cubicle walls to facilitate a smooth workflow that keeps moving without long delays.

These options have to change when we can no longer drop in on one another in natural and convenient ways face-to-face. Instead, emails and phone calls interrupt periods of focus, and instant messages and other collaboration tools contribute to an "alwayson, constantly distracted" state that inhibits work productivity. What's the answer for remote workers?

"As IT leaders plan a long term remote work strategy, support for collaboration beyond video conferencing, including professionalgrade content sharing and collaboration, are key," explains "As IT leaders plan a long term remote work strategy, support for collaboration beyond video conferencing, including professional-grade content sharing and collaboration, are key."11

> ~ Rebecca Wettemann Principal Analyst, Valoir.

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Rebecca Wettemann Principal Analyst for Valoir. And, business executives are taking notice of the need to improve remote work tools. Seventy-three percent of CFOs believe a move toward job flexibility will make their organizations better in the long run, and 56% are planning additional investment to ensure they have the right technologies to get them there. 2

The technologies necessary for effective remote work fall into three basic categories:

- Capture
- Cloud-based document management
- Process automation.

Capture

Think of capture as the collection and organization of information (regardless of what format it is), so that it can be routed into your document management system for secure access and management.

Traditionally, capture technologies work with scanners and multi-function devices (MFD) to convert paper records into digital images (commonly referred to as scanning). Electronic files are easier to store, secure, and access remotely.

Though it may be tempting to believe very little important information is in paper format, keep in mind that paper use at the average business is growing 22% per year!¹³ When setting up a remote work environment, most workers will need the ability to digitize paper-based information using a scanning application, or businesses can work with outsourced mailroom companies who receive and scan important mail directly into your repository.

Known as Intelligent Capture, the best scanning applications will also extract important information as the document is being scanned to automatically create the index values you'll use to find the document later. For example, a company would likely want to extract important information from a typical

invoice such as invoice number, date, line items, and totals. This extracted data can also be sent to other applications, such as your accounting system, to eliminate the need to hand-key the data into that system as well.

Learn more about our scanning options: $\underline{PaperVision^{@} Capture}$, which includes the AI-driven data extraction engine $\underline{PaperVision^{@} Forms\ Magic^{TM}}$, $\underline{PaperFlow^{TM}}$ and $\underline{PaperVision^{@} ScanPro}$, which comes ready to load scanned documents directly into your cloud repository.





Cloud-based Document Management

Collaboration has been a big challenge in our pandemic-related work-at-home scenarios. As we quickly turned to shared online drives, we discovered they were unorganized and offered insufficient security for our important business records. Video conferencing tools, while helpful for communication, didn't give us an effective way to share and organize files either. Cloud information management services offer the collaboration tools needed to keep files organized, including check in/out and version control.

Cloud also improves the security needed to lock information down in compliance with regulations, including password protection, context-sensitive access, and encryption during transmission and while information is at rest in the system. In fact, most companies discover that their overall protection from data threats improves when they begin working with cloud document management services.

Effective cloud information management services are naturally mobile-friendly, making them a great choice since many of today's work-at-home employees are using personal devices such as phones, tablets and laptops for company projects. Plus, implementation is simple, because they don't require companies to install software on each remote workstation or device.

Rather than simply filling a gap for now, cloud-based document management also represents a solid long-term investment that can last long beyond the current crisis. These benefits can lead to real business growth, as discovered by Bob Butterfield at Real Property Management Vancouver.





Case Study: Real Property Management Vancouver (RPMV)

RPMV is a property management company serving both residential and commercial properties. They manage the listings for rental properties, vet potential tenants, and negotiate leases for property owners for more than 115 properties. When they were



unable to locate a packet for an owner who visited their offices, RPMV converted from paper-based filing to an electronic process using PaperVision® Capture. They now store information in the cloud with ImageSilo® The new system allows them to:

- **Save \$115,920** annually by locating information in minutes rather than hours.
- **Reduce setup time** from 3-4 hours **to less than 30** minutes for new owners.
- **Enabled remote work** in response to stay-at-home orders during the COVID-19 pandemic.

"I knew we could do things more efficiently by leveraging newer technologies and eliminating the archaic paper filing system. For us, the efficiencies of PaperVision Capture and ImageSilo® just can't be beat. Our customers and owners really appreciate ImageSilo. The most common compliments we get are that it's electronic, easy-to-access, and time-efficient. We love what it's done for our business!"

Bob Butterfield Owner & President, RPMV

Learn more about our cloud repositories: <u>ImageSilo</u>® which offers secure records access, management, and retention, and <u>PaperVision.com</u>® which offers tiered feature groups sold at a simple per-user price.

Process Automation

Considered by many analysts as the technology that will define the next decade, process automation saves companies money by completing repetitive tasks electronically and improves efficiencies by eliminating process bottlenecks. Process automation enables digital files to trigger electronic work processes. These files may come from scanning, digital creation or even be attached to an email or an online form. When processes are automated, employees get notified of work that requires their attention, and items are instantly routed to the next step in the process once tasks are completed regardless of where the information is being accessed and the work being done.

Automation comes with numerous benefits, including:

- **Connectivity** people can access the same information regardless of location or device.
- **Transparency** employees can access the same information, which is kept in compliance with regulation requirements
- **Collaboration** two or more workers can work on the same document without overwriting one another's efforts

44% of companies indicate a need to improve process automation as part of the growing trend toward remote work.

— PwC²



Digital records, a cloud repository, and process automation enabled one New Mexico business to save jobs and keep goods flowing during the COVID-19 pandemic. Cooperative Educational Services moved employees home overnight but kept business moving without interruption.

Case Study: Cooperative Educational Services (CES)

CES is a procurement agency that provides shared purchasing services to 89 school districts, 100 Charter Schools, 221 Higher Education institutions and 250 other public entities in New Mexico. They manage Request for Proposal (RFP) processes, including solicitation, evaluation, vendor selection, and contract management for their members. In 2017, they switched from paper-based contracts and procurement packets to a fully digital records process, using the cloud-based service, ImageSilo. Like many other states, New Mexico issued a stay-at-home order during the COVID-19 pandemic. As a critical supply chain business, CES remained open, but could not allow employees to congregate at the office. Virtually, overnight, they needed to send their staff to work from home.

- CES has continued to pay \$5-8 million per week to vendors. (If those payments stopped, some of them would be forced to lay off staff or close their doors, so remote work is helping both CES and their vendors and partners stay open and keep people employed during the pandemic.)
- During the first few months of the COVID-19 shut-down:
 - CES has processed orders for schools, counties and municipalities in the amount of \$64,038,344 for goods and services they needed.
 - CES had paid out a total of \$72,201,145 to 299 vendors, helping them to keep people working.

"It's been pretty much seamless to send people home, because they were managing and accessing information in the cloud. Without ImageSilo, there would be no way for us to work at home. Our business continues. We haven't had a slow down because schools, cities and counties still need to procure and pay,"

~Robin Strauser, Deputy Executive Director

Learn more about our process automation options: PaperVision® Enterprise WorkFlow which routes business documents from step to step in a business process and the PaperVision® Automation Tools, which uses Robotic Process Automation (RPA) to complete tasks using electronic user accounts or "bots" rather than expensive manual labor.



Distinguishing Critical Remote Work Capabilities

Finding the right remote work technology stack doesn't have to be complicated! Now that you understand the Big Three critical systems, let's take a look at important features you need to enable your digital transformation. Keep your focus on:

- Effective management of information to enable collaboration
- The core security needs your organization must meet to keep sensitive information private



Remote Work Goal	Capability	Advantage/Benefit
Find information instantly	Full text search	Faster access to information speeds every process and function across your business. Allows you to find information based on any word or phrase that comes to mind, rather than requiring you to remember exact wording or titles
Keep files containing sensitive information private	Document encryption	Protects documents not only while they're being stored, but also when they're accessed to prevent information from ever being compromised
		Files shared via email or online drives can be interrupted during transfer an end up in the hands of a hacker. This method of sharing information can violate various regulations. When files are encrypted, they're scrambled in a way that cannot be unlocked without proper authorization. Encryption keeps information safe and sound both during transition and while sitting at rest in the system.
Keep employees from accessing information they don't need to see	Password protected access	Allows only authorized users to see sensitive business information wherever it is accessed
		Keeps employees out of files they shouldn't see, but also keeps hackers out as well—no matter where people are working.
		Bonus Password Capabilities: complexity requirements, forced expiration, tiered access, security groups, automatic lockout for idle sessions

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Remote Work Goal	Capability	Advantage/Benefit	
Prevent employees from emailing, saving, printing, etc. files that shouldn't be shared	Tiered access to content	The ability to setup security policies that lock down access to content and functionality not only by project but also by user group and even by the individual document	
		Gives companies the ability to control who casee information at a fine-tuned level. For example, users can be setup to only view certain records, without being able to print of edit them. You can also use this capability to give employees access to some records within a project without unlocking their access to other records in the same project that they don't need to see.	or
Prove compliance with data management regulations	Audit reporting	Keeps track of who accesses each document, what they did with it, and why	
		Allows administrators to track employee task and productivity without becoming "Big Brother," and keeps a log of why changes wer made when you aren't in person to have a conversation. You'll always know if a file has been changed without authorization.	ce
Ensure compliant disclosure of records	Enhanced audit tracking	Requires employees to log the name of the individual they're sending information to and why when they transmit data outside the company	d
		This is a requirement in certain industries lik healthcare, where regulations require records of everyone who receives or has access to private health information. It may not be needed by everyone, but is absolutely essenti for others.	S
Help users keep track of documents as they work on projects together	Document check in/out	Allows only one "master" version of a document to be checked out for editing, preventing overlapping effort	
		Offers structure to people working together on the same project. Keeps them from makin the same changes as a colleague or from overwriting each other's efforts.	ıg



Conclusion

In a difficult economic season, experts estimate work-from-home initiatives will save US employers over \$30 billion daily during the COVID-19 crisis. As organizations recognize just how significant their savings can be, the pandemic has created a tipping point for remote work. Make sure you're prepared by carefully choosing your capture, cloud, and automation technologies today.

Though CFOs are pulling back
2020 technology investments
overall, "areas integral to growth,
notably digital transformation (17%),
customer experience (9%)
and cybersecurity and privacy (5%)
are less likely to be considered."

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Additional Resources

There are a lot more opportunities to learn about enabling remote work. Take advantage of the resources below to answer your questions and provide additional guidance.

Digitech Systems

At Digitech Systems, information management is our bread and butter. We want to help you understand what it is, and our website is one of the best places for you to learn more about the technology, accompanying products, education and expertise we offer.

www.digitechsystems.com

https://www.digitechsystems.com/features/scanning-capture/

https://www.digitechsystems.com/features/cloud-information-management/

https://www.digitechsystems.com/features/process-automation/

AIIM

Get more information on ECM news and industry research from the ECM industry perspective. This organization follows the industry closely, including the capture market, for news, updates, market watch and more.

https://www.aiim.org/SearchPage?keyword=remote+work



Vocabulary and Terminology

Cloud Services

Cloud services provide an alternative way for companies to run their business. Instead of implementing, maintaining and running content management applications themselves, business simply access everything they need through the internet. ImageSilo is a cloud ECM application.

Collaboration

To work together on a document/information with another person or group in order to achieve a common goal.

Document Check-in/out

Allows only one "master version" of a document to be checked out for editing, preventing overlapping effort. Digitech products enable users to check-in either a revision (minor editing) or a new version (significant changes) of a document.

Document Encryption

Protects documents not only while they're being stored, but also when they're accessed to prevent information from ever being compromised

File Share and Store (FSS)

A category of applications (primarily cloud-based) that allow individuals to exchange files and collaborate to make edits. Common examples include Dropbox, and Good Drive.

Full Text Search

Allows you to find information based on any word or phrase contained within a document or its index values that comes to mind, rather than requiring you to remember exact wording or titles.

Password protected access

Requires users to login with a username and password when accessing an application to allow only authorized users to see sensitive business information wherever it is accessed.

Telework

Working style that allows professionals to work (execute projects, complete work tasks, collaborate) outside of a traditional office environment utilizing the internet. Also known as telecommute, remote work, distributed work, mobile work, work from home (#WFH), smart working (UK), and workshifting (Canada).

Version Control

A system that records changes to a file or set of files over time so that you can recall specific versions later. In Digitech Systems products, changes to a document can be checked back in as a revision (minor changes only) or a new version (major changes/complete rewrite).



Workflow

Electronically routes your documents from step to step, alerts users of pending work assignments, and tracks and reports progress. By automating the flow of information, workflow software can dramatically improve business efficiency.



Remote Work Case Studies

For more real-world applications and testimonials on how companies are enabling remote work, please visit https://www.digitechsystems.com/category/case-study/.



<u>Real Property Management Vancouver</u> saves \$115,920 annually by locating information in minutes rather than hours for property owners and tenants.



<u>Cooperative Educational Services</u> moved employees home but kept \$5-8 million worth of goods and services flowing in the New Mexico economy during the COVID-19 pandemic.



<u>GPC Contracting</u> used to keep only paper files in their offices, requiring employees to drive 2-3 hours out of their way. Now they enjoy "access anywhere [they] go."



Netcare Access knows that in crisis intervention mental health, every second counts. They've enabled medical personnel to view patient information and provide care from vitually anywhere anytime it's needed.



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Digitech Systems, LLC

Digitech Systems, LLC enables businesses of any size to more effectively and securely manage, retrieve and store corporate information of any kind using either PaperVision Enterprise content management (ECM) software or the world's most trusted cloud-based ECM services, ImageSilo and PaperVision.com. By significantly reducing the cost, Digitech Systems has moved ECM from a luxury convenience to an essential element for every well-managed business.

Digitech Systems continues to raise the standard of excellence in the ECM sector, as evidenced by the numerous awards they have received including multiple Nucleus Research ROI Awards. In addition, Buyer's Lab has repeatedly chosen PaperVision Capture as the best data capture and workflow solution, ImageSilo and PaperVision.com as the outstanding cloud content management systems, and PaperVision* Enterprise as the most outstanding ECM software in the marketplace. The company's Process Automation Tools were recently named as a Top Ten solution. To learn more about the company's software and services that deliver any document, anywhere, anytime, visit www.digitechsystems.com. You can also connect with us on:

- LinkedIn (https://www.linkedin.com/company/digitech-systems)
- YouTube (https://www.youtube.com/user/DigitechSystemsInc) and
- Twitter (@ECMNow)

Contact Information

Digitech Systems, LLC 8400 East Crescent Parkway Suite 500 Greenwood Village, CO 80111

Toll Free: 866.374.3569

Email: SalesTeam@DigitechSystems.com

www.DigitechSystems.com

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