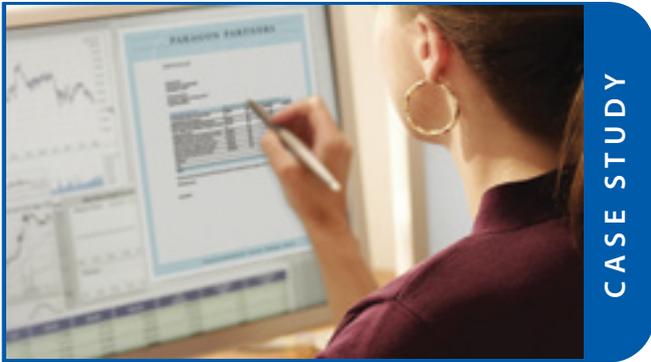


From Paper to Digital: How Canon USA's Credit Department Streamlined its Document Processes as Part of a Move to a New HQ



CLIENT	Canon U.S.A., Inc.
INDUSTRY	High Tech Manufacturing
SOLUTIONS	Imaging Services: Consultation and File Conversion to Digital Format

Client Profile

Canon USA is a provider of consumer, business-to-business, and industrial digital imaging products and services. Since the corporate headquarters opening in 1955, the company had accumulated decades worth of paper files. Now, in preparation for an upcoming move to a new corporate building, the company considered how to eliminate paper files, and create a strategy for managing documents in the future.

Challenges

Challenges of managing the accumulated documents were especially evident in the company's Credit Department. The existing records management process was slow and highly manual. Paper files, gathered during the 30 years at the current location, totaled about 700,000 pages, and filled up 35 cabinets (175 drawers).

The manual record keeping process, including the daily update of files was time consuming and costly. While a unique account number was assigned to each customer to keep track of the customer's records, in practice it was difficult to trace all documents if the customer purchased more than one type of product. This could potentially result in errors, such as associating files with the wrong account. There was clearly a need to scan and index all the files, to create a transparent digital records database.

Additionally, when Canon USA moved its headquarters, the company set a goal of becoming one of the most environmentally friendly offices in the country, which entailed the need to reduce file storage space and usage of paper.

Solution

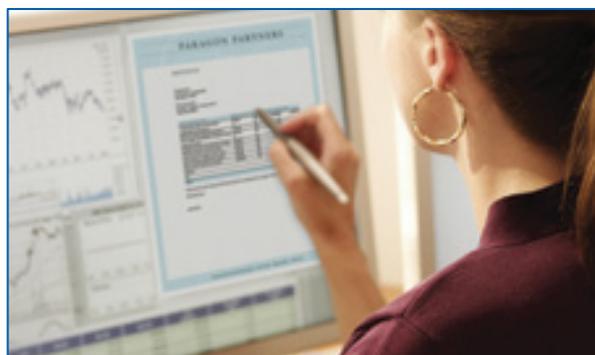
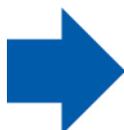
The Canon Information and Imaging Solutions (CIIS) Professional Services team provided **Imaging Services**, which included detailed assessment of the unique needs of the Credit Department, strategy formulation, and design of a solution for converting the files to digital format as well as ongoing management of future records. Then, the existing files were scanned using Canon scanners, and indexed for archiving and easy retrieval.

"In the Credit Department, we eliminated 35 file cabinets (700,000 pages), and made the records available electronically to multiple users, who can now view the files on their desktops. Even though many of these documents have been accumulated over many, many years, they need to be accessed regularly and this product / process has given us that ability. Documents were in so many different formats and conditions (thermal paper faxes, different sizes...) and this process eliminated all of those issues. It also eliminates any misfiling or missing documents that may have been on users desks. It has really increased efficiency, eliminated physical storage requirements and manual filing needs."

Michelle Renee Giacalone,
Director of Credit Risk Assessment
for Canon U.S.A., Inc.

Solution – Key Points

- A detailed analysis of the records keeping needs specific to the Credit Department was prepared.
- CIIS team designed a solution that not only eliminated the existing back-files, but also planned for a go-forward records management process.
- All existing paper documents were scanned to reduce storage space .
- The records were indexed, to enable consistent archiving in the Customer Master Data File system.
- Users are able to find and retrieve relevant information by document code or customer name within minutes, increasing productivity and accuracy.
- “Therefore” digital management system was adopted, to ensure an ongoing uniform record management .
- Consultation and project management was provided by the CIIS Professional Services – a team of experts with experience across various verticals, and a number of industry certifications, such as Project Management Professional (PMP), Certified Document Imaging Architect (CDIA+), Certified Information Professional (CIP), Certified Six Sigma Greenbelt Professional (CSSGP), among others.



BEFORE	AFTER
Over 35 cabinets of files, 175 drawers, 700,000 pages!	Electronic files – no physical storage space needed
Spent hours to search for misfiled records.	Time to search for records reduced by 90%
Inconsistent, manual and error-prone records management process.	Consistent and uniform digital records management process. Improved compliance.
Limited access to files. Only one user at a time can work with the paper record.	Easy, any-time access to digital files. Multiple users can see the records right from their desktop.
Lack of transparency – inability to see related records.	All related documents can be tracked, using the indexing system.
Ensuring secure access to records can be challenging.	Information security, with needs-based access for authorized users.
Challenges with accommodating the growing number of records.	Created a strategy for managing records now and in the future.
Paper-intensive office setting	Increased environmental sustainability

Moving Forward

The move from a paper-intensive office setting to a new, environmentally-friendly headquarters, designed to meet the LEED® Gold certification standards, was only the first step in the process of productivity improvements. The solution for ongoing digital records management that was planned, helps the Credit Department operate more efficiently and increase compliance, as a result of the greater transparency and easier accessibility of records. In addition to the Credit Department, Canon USA has leveraged Imaging Services to convert files in various other functional areas. Overall, approximately 2 million pages of documents were turned into electronic format.

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