

Paperless Office

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Paperless Office

What is the paperless office

The Paperless Office allows you to store and retrieve electronic documents for client projects.

The automation tools available today provide the opportunity to receive faxes electronically, scan and save paperwork electronically and save emailed documents. All of the documents regarding a client's project can be saved and stored in one central location. This process can eliminate the need for paper files and increase your firm's overall organization.

In this User Guide, we will describe how to setup electronic folders in Windows to store your documents. We will also provide guidance on how to receive and save electronic documents. After you have this structure setup, we will show you how to retrieve documents in Studio Designer.

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Setting up document folders

The first step with the Paperless Office is to create a filing structure in Windows to hold documents.

Documents must be stored in a folder named “Client” in the “StudioDesigner” folder on the server. Then you will create a folder for each Client/Project combination that you want to store documents for. The last step is to create a folder for each Room in the client’s project.

Creating the “Client” folder

The client folder will contain all electronic documents for your design projects.

- Select **My Computer**
- Select the folder where Studio Designer is located on the server. This is probably “c:\Program Files\StudioDesigner.
- Select **File**
- Select **New**
- Select **Folder**
- Name the new folder Client

Creating Client/Project folders

Next, you will create one folder for each Client Project combination to store the client’s documents.

- Select the **Client** folder
- Select **File**
- Select **New**
- Select **Folder**
- Name the folder the Client ID in Studio Designer plus the Project ID (if the client has projects).

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Example:

- Client ID = SMITH
 - Project ID = LA
 - Folder name = SMITHLA
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- Client ID = SMITH
 - Project ID = there are not projects for this client
 - Folder name = SMITH

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Creating Room folders

Next, you will create one folder for each Room in the client's project to store the client's documents.

- Select the **Client** folder
- Select the client's folder, SMITHLA
- Select **File**
- Select **New**
- Select **Folder**
- Name the folder the Room ID in Studio Designer
- Repeat the above steps for all rooms

Setting up room folders is optional. If you setup room folders you will be able to store and organize client documents by room rather than grouping all client documents in one folder.

The following is an example of how your folders may look:



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How to store electronic documents

After the client folders are setup, you can begin saving client documents on your computer.

Selecting the folder to save your document in

You can save word, excel and other electronic documents. You can have your faxes sent to you as an electronic document instead of printing on your paper fax. You can scan paper documents and save them electronically. There are many ways to obtain electronic documents instead of paper documents.

When you save the document you will select to save it in the client's room folder in the client folder.

Example:

Saving a quote for item "001-A" in room "01" for client "Smith" project "LA"

Select to save in it folder StudioDesigner\Client\SmithLA\01

Naming client documents

The most important part of saving your electronic documents is naming the document. You want to be able to easily and quickly find the document you are looking for.

We recommend prefixing the name with the item's number and component in Studio Designer. Then we recommend adding a description of what the document is. This will keep all documents related to an item organized together.

Example:

"001-A quote for item"

The full name and location of the document would be:

"c:\Program Files\StudioDesigner\Client\SmithLA\01\001-A quote for item.doc"

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How to open client documents in Studio Designer

After the client's documents are stored on your computer, you can open them in Studio Designer.

Open a client document

To open a client's document in Studio Designer:

- Select **Design Projects**
- Enter the Client and Project the document is for
- Optionally enter the Room (entering the room narrows the list of documents listed)
- Select the **Paperless Office**
- The list of documents for the Client/Project are displayed
- Select the document you want to open
- Select **Open**
- The document will be opened with the appropriate program
- Word documents are opened in Word, Excel documents are opened in Excel

