

**Paperless Systems**

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Many people complain about the amount of paperwork involved with the systems they have in place for ISO 9001, ISO 14001, etc. In addition, shelves groan under the weight of forms and reports and it is difficult to find and manage data. This article discusses the benefits of going paperless and shows how this may be achieved.

**Benefits**

Apart from the obvious outcome in reduced paper use, the following benefits apply when a paperless system is in place:

- People do not have to search for blank forms and then complete them.
- The need to transpose information from forms into spreadsheets, etc., is removed. This has the secondary benefits of:
  - Removing the cost of doing this
  - Removing the risk of errors in transcription
  - Removing the time delay between data being recorded on paper and it being transposed
- It becomes easy to find audits, objectives, and all the other recorded information; you don't need to keep masses of files that you have to search through.
- Data is live. Instead of having forms which may have actions added to them, and who knows what is up to date?, you can have a single set of data which is always the most current.
- You can have a single personal To Do List, with all the actions from meetings, audits, etc., for a person listed in one report.
- You can manage actions easily. For example, you can see all the outstanding actions, or overdue actions with a single click of a button.
- You can see outstanding topics from previous meetings.
- You can create analysis reports with the click of a button. It is no longer necessary to count, say customer complaints and transpose the data into a spreadsheet. Counts and other analyses can be done at the click of a button.
- External auditors love paperless systems, because of the analysis function and it being so easy to see the complete picture. The Objectives section shown below is an example of this

**Can ISO 9001 etc., systems be totally paperless?**

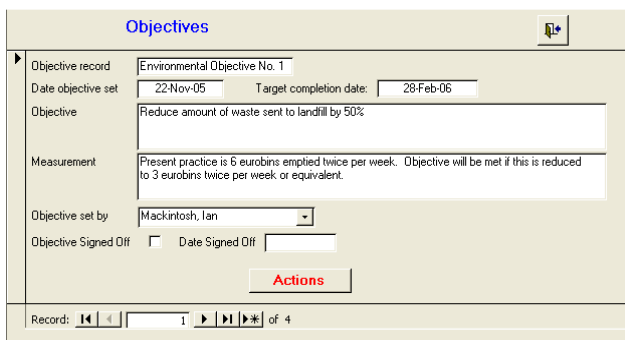
The short answer to this is "probably no". What can, and should be done, is to avoid paper for data input and recording. However, you may find it desirable to have paper outputs such as labels for non-conforming parts, reports or communications to external parties.

**What examples are there of paperless systems?**

The following are some examples of paperless inputs from the SSS INTACT integrated action management system. It is not an exhaustive list, but it gives a flavour of what can be done. The key approach is that everything can be regarded as an issue, and for every issue there can be any number of actions attached to it, ranging from no actions to multiple actions on different timescales to different people. The actions for each issue are entered via the **Actions** button.

**Objectives**

Objectives are entered by the form shown below and actions to achieve them entered via the action button. The report shown here shows the complete story for this objective



**Objective**

<b>No: Environmental Objective No. 1</b>			
<b>Objective</b>	Reduce amount of waste sent to landfill by 50%		
<b>Date objective set</b>	22 November 2005	<b>Target completion date:</b>	28 February 2006
<b>Originator</b>	Ian Mackintosh		
<b>CrossReference:</b>	Di-110		
<b>How the objective is measured:</b>	Present practice is 6 eurobins emptied twice per week. Objective will be met if this is reduced to 3 eurobins twice per week or equivalent.		
<b>Status:</b>	Reduced to 4 bins rather than 3 but due to segregation of waste streams we believe we have achieved target, 4 bins rather than 3 is practical.		
<b>Signed Off:</b>	Yes	<b>Date Signed Off</b>	10/05/2006 <b>Was the object achieved?</b> Yes
<b>Actions to meet this objective</b>			
<b>Proposed Action:</b>	Discontinue external skip	<b>By:</b> Chris Haresnape	<b>Due Date:</b> 15-Dec-05
<b>Actual Action:</b>	External skip cannot be discontinued until March 2006. Have decided to discontinue this after that date but to have number of eurobins and use external skip as a relief if this reduction causes problems.	<b>Completed?</b> Yes	<b>Date Completed:</b> 30-Nov-05
<b>Proposed Action:</b>	Review contract to see if eurobins can be reduced	<b>By:</b> Chris Haresnape	<b>Due Date:</b> 15-Dec-05
<b>Actual Action:</b>	Have reviewed this. To be reduced to 4	<b>Completed?</b> Yes	<b>Date Completed:</b> 30-Nov-05
<b>Proposed Action:</b>	Obtain "Slim Jim" or similar type waste bins for office waste.	<b>By:</b> Chris Haresnape	<b>Due Date:</b> 20-Dec-05

## Meetings

Instead of having individual minutes in Word documents with actions arising, INTACT has the ability to record the minutes. At first glance, this doesn't seem to offer a benefit; what does it matter where you record the data? However, as there typically actions arising from the meeting, the use of INTACT automatically includes such actions in the action management system, appearing in personal To Do lists, etc. In addition, INTACT can display the open actions from previous meetings, and these are reported in the minutes report, thereby meeting a requirement of ISO standards with no effort. Note the Standard Heading button shown in the form below; these are the mandatory topics from the ISO standard(s).

## Audits

There are two sides to audits, the audit schedule and the audit record. INTACT has both of these.

System	Due date	Accountable person	Completed	Date completed	Site
[6.2 pA - Evaluation]	08-Jan-11	Chambers, Phil	<input type="checkbox"/>		PC
[3.3 pA - Objectives and Targets]	08-Jan-11	Simmons, Mick	<input type="checkbox"/>		PC
[4.1 pA - Roles and Authorities]	08-Jan-11	Chambers, Phil	<input type="checkbox"/>		PC
[6.6 pA - Customer feedback]	08-Jan-11	Chambers, Phil	<input type="checkbox"/>		PC
[1.1 pA - Management Review]	08-Jan-11	Chambers, Phil	<input type="checkbox"/>		PC
[3.7 pA - Part B Compliance]	08-Jan-11	Chambers, Phil	<input type="checkbox"/>		PC
[5.7 pA - Spillage and Major Fire Respons]	08-Jan-11	Chambers, Phil	<input type="checkbox"/>		PC
[3.1 pA - Aspects and Impacts]	08-Jan-11	Simmons, Mick	<input type="checkbox"/>		PC
[5.5 pA - Finishing]	12-Mar-11	Chambers, Phil	<input type="checkbox"/>		PC
[5.6.3 pA - Pre-Press FTP]	12-Mar-11	Chambers, Phil	<input type="checkbox"/>		PC
			<input type="checkbox"/>		PCP

This shows the audit schedule form. A scheduled audit will appear on the accountable person's To Do list 4 weeks before the due date.

When the completed box is ticked, a new audit is automatically scheduled, normally 12 months hence.

You can print the audit schedule if desired.

This shows a typical audit entry form. It has standard headings and the normal Actions button for any corrective actions arising.

In addition to the standard report for an individual audit, INTACT also gives a summary report of any actions arising or non-conformances between a selected date range.

## Customer feedback

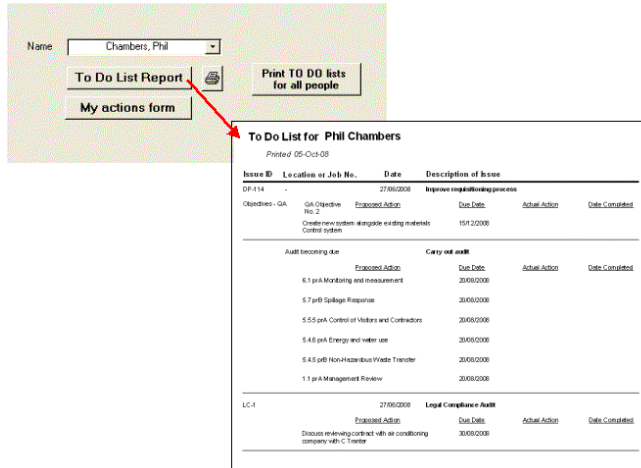
Customer feedback can be both positive feedback and complaints. The form below shows complaints.

The form is normally completed by the person receiving the complaint. Some users of INTACT use an e-mail function where a defined person is e-mailed automatically when a complaint is entered.

The "complaint type" box enables a report to be automatically generated giving a Pareto analysis of counts and costs of complaints types.

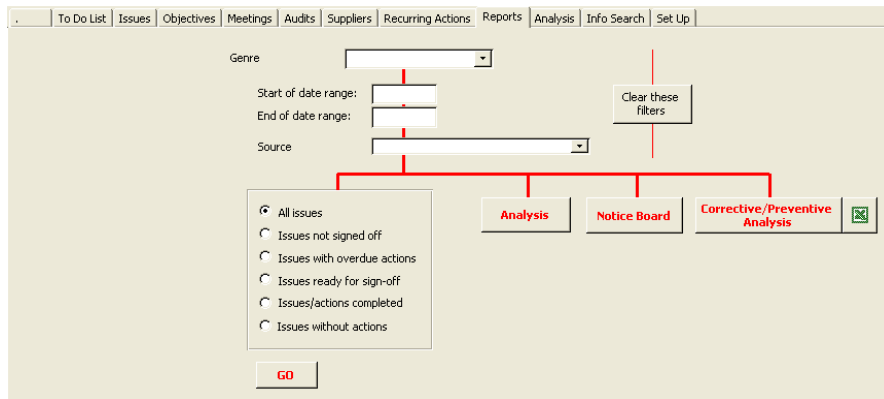
**To Do lists**

The To Do list is automatically generated. It shows all the open actions for a person, plus scheduled activities, such as audits, becoming due



**Management information**

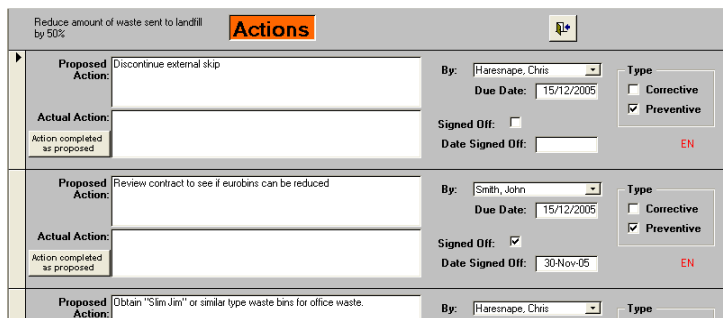
Typical management information automatically generated is that shown on the menu below.



The analysis button gives a count of issues raised, actions completed, actions overdue, etc. The corrective/preventive analysis is a count by month of corrective and preventive actions.

**Actions**

The actions form is opened from any of the other forms.



It shows to whom the action is assigned, the due date and whether the action is corrective or preventive.

The actions form allows the actual action to be different to the proposed action.

**How do I find out more?**

More details on INTACT are available from the INTACT pages of [www.strategicsafety.co.uk](http://www.strategicsafety.co.uk). Alternatively, e-mail or phone us on the numbers below