

## **Have You Gone Paperless?**

Going “paperless” offers many benefits. You save on office supply costs and filing time, plus eliminate lost reports to name just a few of the advantages. GMS Accounting and Financial Management Software enables you to easily go paperless using the PDF Reports option found at the top of your screen between Tools and Help. The system can automatically generate a PDF file for selected reports and store them in a specific folder that you designate. No additional steps are necessary by you for these files to be generated and stored once the setup is completed. In addition to identifying where the PDF files will be stored, you also select for which user this process will happen.

How this works, for example, is typically one employee is designated to run Monthly Processing, even though several other users may look at certain reports under Monthly Processing at different times of the month. On the Setup PDF Reports tab, you will select that employee from the combo box and also select the location you have set up to store the PDF files. Keep in mind what location you choose for confidentiality purposes. For those reports that you want to save as a PDF file, you would put a checkmark next to the report name. Each time that employee prints one of the reports selected, it will automatically form a PDF file.

When you want to view the PDF files, go into PDF Reports and select a report. It will give you a list of PDF files with the name of that report for every period ending date stored in the current location.

Before setting up the PDF Reports, be sure to think through how you will structure your paperless filing system. Will it work best for you to have folders set up for each fiscal year or by function (monthly processing, payroll, accounts payable, etc.), or by groups of reports? Is it necessary to save a PDF file of Timesheet Reports under Monthly Processing since you can easily prepare a report at any time? If you do, will Timesheet Reports be stored in a different location than other monthly processing reports? Who has access in your agency to the drives and folders you have selected? Are rights restricted to these folders for those who should not view the information contained? As a final note, be certain the folders selected to hold your reports are backed up regularly.