

In Search of the Holy Grail: The Paperless Office

By

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Lawyers and their staffs universally have one thing in common . . . they are buried in an unending sea of paper. Pleadings, correspondence, briefs, exhibits, memos, pink phone message slips, sticky notes . . . You name it, paper is everywhere, choking and clogging the flow of work in both private and public law practices. Sometimes getting client work out is more an issue of managing mounds of paper than applying legal brilliance. Have you ever considered how much lawyer and legal staff otherwise billable time is wasted every single day looking for information that can only be found in paper files? Have you ever wondered if there is any hope at the end of the paper-lined tunnel? The answer is maybe, just maybe . . .

1. Old Technology: OCR Scanning.

For years, lawyers have been on a holy quest for the mythical and fabled "paperless office." This endlessly elusive concept is likely the "Greatest Lie of the Technology Age." We're never going to become "paperless," at least in the foreseeable future. We just need to accept the fact that even if we reduce the amount of paper we generate, others will continue to send us paper. Early technology scanning was the next great answer, but since the dawn of document scanning, the term "scanning" has been synonymous with "OCR" (Optical Character Recognition). In other words, most people equated scanning with trying to use software to identify the characters on a page and turn it into an editable word processing document. It was a good idea conceptually, but in practice, even with the best OCR technology available, the process is still far from perfect. For example, with 97% OCR accuracy, three incorrect characters out of every 100 could mean as many as 66 errors per page on average. And what if one of those errors is a nearly-impossible-to-detect-but-a-bet-the-case-

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on-it number?? Not good. Not at all. The bottom line is that modern scanning should not be equated with OCR. Such a comparison is a fallacy that no longer needs to be the case.

2. New Technology: Image Scanning.

With a concept co-author Ross Kodner calls the "Paper LESS Office,"³ scanning is viewed from a common sense perspective: as a way to turn physical paper into digital paper.³ When scanning as *images*, the process can be 20 times faster than the processing-intensive and doomed-from-the-start OCR approach. Further, imaged documents on screen, scanned as searchable PDFs, look PRECISELY like the originals: handwriting, pre-printed lines / boxes: all scan perfectly.⁴

Here's how Hirst Applegate⁵ uses the Paper LESS Office™ process in a nutshell:

- Hirst Applegate staff receive paper documents in the mail and then scan each one using a low cost, but efficient Fujitsu ScanSnap scanner – essentially “PDF Machines.” Every staff person and attorney at Hirst Applegate has a ScanSnap on their desk in order to make converting paper document to electronic documents second nature.
- Once scanned, the electronic documents are saved in the universally readable PDF format. With a click of the mouse and a few seconds per page processing time, the text in the electronic document is converted to searchable text. The original paper document is then dropped into a redweld expandable file folder and in most cases, never touched again. In some instances, the original is mailed to the client.
- The electronic documents are stored in the attorney's electronic “in-box” using the Worldox document management system⁶, or they are routed directly to the attorney via email. Either way, a copy of the electronic document is saved on the firm's network server which is backed up nightly.
- The attorney reads the electronic document on his computer monitor. If she is on the road, she can access the electronic documents through the firm's VPN, high-speed remote connection.
- The Worldox document management system used by Hirst Applegate organizes paper documents received in the mail; e-mails received with attachments; and documents created within the office, regardless of which software program was used to create them, whether it be Word, Word Perfect, Excel, Adobe Acrobat, etc.

³ The Paper LESS Office™ concept was first put forth in an article of the same name in Law Office Computing in late 1995. Presentation audiences all over the world have favorably received the concept.

⁴ This is a core part of the concept that co-author Ross Kodner calls the Paper LESS Office™ (see www.microlaw.com/cle/plessindex.html).

⁵ Hirst Applegate is a Cheyenne firm known for trial work and successful representation of a broad range of clients in Wyoming. The firm specializes in litigation, estate planning & estate administration, energy, utility, business, and real estate law.

⁶ Worldox is a product of World Software, Inc. (www.worldox.com) – one of the three leading legal-focused document/e-mail management and work product retrieval systems.

- If it is not possible or efficient to locate the desired document by viewing the file name, then it usually can be located by searching for key text within the document itself using a word search similar to a Google, Lexis or Westlaw query. Worldox works at light speed compared to the traditional Windows file search function. Even scanned documents can be located this way, provided the image was converted to searchable text using Adobe Acrobat 7 or an equivalent product at the time it was scanned.

3. The Payoff of the Paper LESS Office™

In today's fast-paced technology world, many clients expect their attorneys to be at their level. With the relatively low cost of available scanning hardware and document management software, firms can now keep up with their clients. Part of the cost of this technology is offset by the savings in postage, long distance phone calls associated with faxing, and an increase in productivity. The level of stress involved in searching for lost files and documents is reduced dramatically. The following chart demonstrates the advantages of electronic vs. paper files:

Factor	Paper Files	Electronic Files
<i>Storage</i>	Paper files are expensive to file, route, and store.	Electronic documents are cheap and convenient to store. If paper files are shredded after closure, storage costs are cut dramatically, yet lawyers have all old file information accessible instantly via electronic searches. Archiving on the firm's server takes the place of physical storage.
<i>Finding Lost Documents</i>	Finding lost documents takes significant time—sometimes many hours. If a document has been misfiled, it may never be found.	Searching for electronic documents is instantaneous using search engine and indexers. A lawyer wasting 15 minutes each day looking for paper files can easily recover valuable billable time by immediately locating “electronic paper” and not chasing paper files around the office.
<i>File Sharing</i>	Collaborating on paper documents is cumbersome—copies must be made and routed.	Collaboration, revisions, remote access, and sharing of important information are very convenient when documents are stored electronically.
<i>Remote Access</i>	Paper documents must be mailed or	Available to attorneys and staff over

	faxed off site.	secure, remote connections, or can be received via e-mail.
<i>Protecting Client Files From Disaster</i>	Paper documents are at risk for being destroyed by fire and natural disasters.	Electronic files are easily backed up and stored off site, and can be restored to the firm's network in little time. It is the first realistic way to protect paper files from damage by fire and natural disasters.
<i>Brief Banking</i>	Tedious filing and organization must be employed in order to quickly find relevant briefs in paper format.	Electronic versions of briefs and memos can be quickly located using search engines and indexers looking for specific words or phrases.
<i>Email Management</i>	Do you really want to print every email sent and received to make them part of a "complete" paper file? What about the attachments?	The Paper LESS Office™ approach using the Worldox document management system allows you to save ("profile") a stand-alone email or one with multiple attachments in a single step – for both inbound and outbound messages – a Godsend.

4. Making it Happen.

If you are considering moving from paper to electronic files, but aren't sure where to start, here are a few suggestions.

- First, make the commitment to the process of moving towards the paperless goal. The key is dedication and a well-organized approach.
- Second, ensure your hardware is up to the demands of the increased amount of scanning, processing, and storage. Dual monitors are very helpful in simultaneously scanning, storing, and deadlining. Network servers need the ability to store 1 to 5 GB per attorney per year. Having a reliable backup system and testing it often is critical.
- Third, plan and test. Spending months of planning and isolated testing of systems and procedures avoids having to start over and over. Hirst Applegate spent over a year planning and testing before the Paper LESS Office concept was rolled out firm wide.

A *truly paperless* office is never going to happen. No matter how diligently you try to reduce or even eliminate the paper you generate, others will still send you paper for years to come. Even so, you can become Paper LESS™ and much more efficient in your practice. Employing a creative and common sense approach to scanning, and leveraging anti-paper PDF tools, you can transform your desktop landscape. Once you go paper LESS,™ you will find that piles recede and billable time increases. You will touch the paper less, chase around the office for the paper less, and you'll find more profits, more enjoyment, and better client responsiveness in your practice.