



## My Paperless Office- a One Year Retrospective

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Last year, I made a bold, and largely unprecedented, decision to install image management software and turn my law firm into a paperless office. As I write this article one year later, I can easily say that it was one of the best decisions I ever made.

Since scanners have become so inexpensive and lawyers are generally enamored with the idea of scanning, many have decided to buy a scanner. As a result, many firms now claim to be scanning, but few are paperless. A lot of firms scan documents for specific projects or purposes such as managing a large case. It is much easier if it is scanned and stored in a specific folder and some scan documents into programs such as *Summation* or *Sanction* for trial preparation and presentation. Though these make excellent use of scanned documents for one purpose or another, none of them will create a *paperless workflow environment* wherein every user can access, share, distribute and communicate in an elegant and effortless way. Therein lays the difference between an office that scans and a paperless office.

The difference is the software. There are many software options, such as the free software that comes with a \$199 scanner. It may be adequate to store documents into a windows directory, but it is totally inadequate to run your law firm. Scanning documents into windows may seem like an attractive way to store them, but it isn't an effective way. *Image Storage* is pointless with no *Image Management*. Scanning in a few documents is a far cry from imaging entire files, mail, faxes and other files formats. To fully capitalize on imaging, law firms need a *paperless workflow environment* that allows them to effortlessly exchange and distribute imaged documents between the entire staff (complete with electronic sticky notes, highlighting and everything else that is done offline). Daily incoming mail is scanned and then shredded (with only a few exceptions). Outgoing mail is scanned at the same time it is copied for mailing. Incoming faxes are received directly in an in-box so it can be viewed, distributed and indexed properly. Any scanned document can be printed, faxed or e-mailed directly from the software. This environment (*in which I have been basking comfortably for the past year*) can only be achieved by using a higher-end, *dedicated* image management software package like File Magic or Fortis.

Many of my colleagues have shown tremendous interest in going paperless, although very few of them have. There are still plenty of

lawyers resistant to this concept and their two leading excuses are: a) they are "not good with computers" or b) they "like to hold files and touch the paper." Others do not want to make the necessary investment, despite my contention (*which has proven to be true*) that the immediate savings in labor costs, office supplies, postage, filing cabinets, office space and, of course, paper will offset the cost of the system. Nonetheless, many lawyers are reluctant to make the initial investment, and opt to buy less expensive products, or modules of existing law office management software. These modules are a far cry from dedicated image management software like File Magic & Fortis. I had used a software module for over five years and am familiar with its image management features, but it is night and day from the *simple, intuitive and elegant paperless environment* I have designed using File Magic.

My investment in high-end image management software has paid huge dividends that simply cannot be realized with lesser products. Last year, I postulated that File Magic is virtually free. This has proven to be true. Each month, we save vast sums of money on paper, file folders, copying costs, postage and other overhead items. Hundreds of pages of document production no longer have to be printed, copied, or mailed with \$15.00 in postage. Instead, documents are burned to CD (*in a secure PDF format*) and are mailed to opposing counsel, all for less than fifty cents. After giving away ten lateral filing cabinets I have created two extra secretarial bays.

My entire staff is much more productive due to the efficiencies of our paperless environment. File, document and mail retrieval time is now lightning fast and searching for files has been eliminated as they can be accessed and worked on by several people simultaneously. Documents can be circulated between users, with electronic highlighting, sticky notes and writing on them, just like in your office. Each user's inbox can be sorted and organized for even greater efficiency. Data security is better than ever because all of our documents are stored on a series of hard drives that work in harmony and back each other up at all times, eliminating data loss so we have much greater data security than paper in filing cabinets.

Perhaps the best measure of our success is the fact that my entire staff has embraced the software, with no resistance. I don't know how I ever survived without it! My quality of life has improved substantially. Now I can connect to my office (*and have access to all of my files, mail and records*) from anywhere in the world. **Life is good!**

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