

# In Search of the Paper LESS Office: What Really Works

REDUCE THE AMOUNT OF CLUTTER IN YOUR OFFICE AND MAKE FINDING, FILING, AND SHARING FILES EASIER BY GOING “PAPER LESS” RATHER THAN “PAPERLESS.” SCANNING PAPER DOCUMENTS AS PDFS AND USING A DOCUMENT MANAGEMENT SYSTEM TO EFFICIENTLY MANAGE YOUR ELECTRONIC MATTER FILES.

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LAWYERS AND THEIR STAFFS universally have one thing in common ... they are buried in an unending stream of paper that chokes and clogs 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 of applying legal brilliance. Have you ever considered how much time that otherwise would be billable is wasted every day as lawyers and legal staff look for information that can be found only in paper files? There may be hope in getting out from under all that paper.

For years, lawyers have been on a quest for the paperless office, but this concept is likely the greatest lie of the technology age. Our offices never will be paperless, at least in the foreseeable future. We need to accept the fact that even if we reduce the amount of paper we generate, other people will continue to send us paper. Early technology scanning was touted as the great answer, but it is not.

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 the page 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 percent OCR accuracy, three incorrect characters out of every 100 could mean as many as 66 errors per page on average. And what if any one of those errors is critical and not detected? The bottom line is that modern scanning should not be equated with OCR.

With a concept that coauthor Ross Kodner developed first in 1995 and has since called the “Paper LESS Office™,” scanning is viewed as a way to turn physical paper into digital paper.<sup>1</sup> When documents are scanned as *images*, the process can be 20 times faster than the processing-intensive and error-ridden OCR approach. On screen, imaged documents that have been scanned as searchable PDFs look precisely like the originals.<sup>2</sup> Even handwriting, preprinted lines, and boxes scan perfectly.

Coauthor Dale Cottam explains how his firm uses the Paper LESS Office process:

- When staff and attorneys receive paper documents in the mail, they scan each one using a low cost and efficient Fujitsu ScanSnap S500 scanner (a model since replaced by the new S510 which includes Adobe Acrobat 8.0 Standard), which essentially is a “PDF machine.” Every person at the firm – staff and attorneys – has a

ScanSnap on his or her desk to make converting paper documents 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 placed in an expandable file folder and, in most cases, never is 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 system,<sup>3</sup> 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.

- Attorneys read the electronic documents on their computer monitors. If they are on the road, they can access the electronic documents through the firm's VPN (virtual private network), a high-speed remote connection.

- The Worldox GX ([www.worldox.com](http://www.worldox.com)) document management system organizes paper documents received in the mail and scanned as searchable PDFs; emails received with attachments (when used with Microsoft Outlook, an email even with multiple attachments can be organized by Worldox in one step, rather than the usual daunting series of multiple save steps otherwise required); and documents created within the office, regardless of which software program was used to create them (for example, Word, Word Perfect, Excel, Adobe Acrobat/PDFs); the same Worldox interface is common to all file-saving processes, simplifying the approach and cutting the learning curve. Effectively, your electronic filing system can be setup and organized to precisely parallel your paper system – making it easy for anyone to understand, regardless of their technical know-how.

- If it is not possible or efficient to locate the desired document by viewing the file name, the document usually can be found by searching for key text within the document itself using a word search similar to a query in Google, Lexis, or Westlaw. Worldox searches at light speed compared to the traditional Windows file search function. Even a scanned document can be located using key terms, provided that when it was scanned the image was converted to searchable text using Adobe Acrobat 7, 8 or an equivalent product

In today's fast-paced technology world, many clients expect their attorneys to be at least at the same technical level of capability and proficiency as they are. With the relatively low cost of available scanning hardware and document management software, firms can keep up with their clients. Part of the cost of this technology will be offset by decreased expenses for postage and long-distance phone calls associated with faxing and increases in productivity. The level of stress involved in searching for lost files and documents is reduced dramatically. Figure One demonstrates the advantages of electronic versus paper files.

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

- 1) Make the commitment to the process of moving toward the paperless goal. The key is dedication and a well-organized approach, as well as educating your team of people about the "why's" for making the shift to viewing electronic matter files as the primary, "sacred" and complete client file.
- 2) Ensure your hardware is up to the demands of the increased amount of scanning, processing, and storage. Dual monitors are very helpful for simultaneously scanning, storing, and viewing multiple programs being worked on simultaneously – the productivity payoff is normally instantaneous. Network servers need the ability to store one to five gigabytes per attorney per year. Having a reliable backup system and testing it often with "mini test restores" is critical.
- 3) Plan and test. Spending time planning as well as the "pilot" testing of systems and procedures avoids having to repeatedly start over. Hirst Applegate spent more than a year planning and testing before the #Paper LESS concept was rolled out firmwide.

A truly paperless office is never going to happen while any of us are alive. No matter how diligently you try to reduce or even eliminate the paper you generate, other people will send you paper for years to come. However, a Paper LESS Office is rapidly and practically attainable. You can use less paper, have to find less paper and touch paper less often, thereby becoming significantly more efficient in your practice. By employing a creative and common sense approach to scanning, turning physical paper into searchable electronic paper, and by leveraging anti-paper PDF tools, you can transform your desktop landscape and find more profits, more enjoyment, and better client responsiveness in your practice.

**Endnotes**

<sup>1</sup>Kodner first put forth the Paper LESS Office™ concept in an article of the same name in Law Office Computing in late 1995.

<sup>2</sup>This is a core part of the Paper LESS Office concept (see [www.microlaw.com/cle/plessindex.html](http://www.microlaw.com/cle/plessindex.html), #wherein scanned documents stored as PDFs look precisely like the originals, but have searchable and even editable textual content.

<sup>3</sup>Worldox is a product of World Software Inc. ([www.worldox.com](http://www.worldox.com)) – one of the three leading legal-focused document/email management and work product retrieval systems, in addition to Interwoven (Interwoven, Inc., formerly known as iManage), and Hummingbird eDOCS (Open Text Corporation, formerly known as DOCS Open).

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*Figure 1*

**Advantages of Electronic versus Paper Files**

<b>Factor</b>	<b>Paper Files</b>	<b>Electronic Files</b>
<b>Storage</b>	Paper is expensive to file, route, and store.	Electronic documents are cheap and convenient to store. If paper files are shredded after closure of a case, 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.
<b>Finding Lost Documents</b>	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 nearly instantaneous using a search engine and indexers. A lawyer who previously wasted 15 minutes a day looking for paper files can easily recover valuable billable time by immediately locating “electronic paper” and not chasing paper files around the office.

		If this 15 minutes can be converted into billable time v. wasted non-billable time, the financial effect can be an additional \$12,000 per year for a lawyer who bills an average of \$200/hour.
<b>File Sharing</b>	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.
<b>Remote Access</b>	Paper documents must be mailed or faxed off site.	Electronic documents are available to attorneys and staff over secure, remote connections or can be received via email.
<b>Protecting Client Files from Disaster</b>	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. As "electronic paper" this is the first realistic way to protect paper files from damage by fire and natural disasters.
<b>Brief Banking</b>	Tedious filing and organization must be used to quickly find relevant briefs in paper format.	Electronic versions of briefs and memos can be located quickly using search engines and indexers that look for specific words or phrases.
<b>Email Management</b>	To make a "complete" paper file you would need to print every email and attachment that is sent and received. Sheer inefficient insanity.	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.