

The Case for Taking Your Firm Paperless in 2016 (Part 2)

By JoAnn L. Hathaway

In last month's column, I wrote about the benefits of going paperless and the policies and procedures that should be implemented to begin the paperless journey. This month, I introduce hardware and software solutions needed for best practices.

Hardware solutions

Scanners

Good scanners are a must for a successful paperless practice. Fortunately, there are several reliable, affordable scanners available in today's market.

Equipping your practice with scanners is an area in which you do not want to skimp. Many law firms already have a scanner in the form of a large, multifunction device that prints, copies, scans, faxes, and more. While such devices certainly have a place in many firms, they should not be the only scanning device in a paperless practice.

Determining how many and what type of scanners to purchase depends on factors such as the nature and size of your practice, the number of people who will scan documents, and the layout of your office.

Ideally, everyone who scans should have a desktop scanner. A popular choice is the iX500 Fujitsu ScanSnap. Some of the reasons you may wish to consider a Fujitsu iX500 include:

- Wi-Fi scanning to PCs, Macs, and iOS and Android mobile device and tablets.
- One-button PDF creation; simply stack the paper and press the scan button.
- Document handling of up to 50 sheets in the automatic document feeder.
- Scanning of both sides of pages simultaneously; images are automatically straightened and cropped with blank sides removed.
- Scanning of up to 25 pages per minute with advanced paper handling.
- Scanning everything from business cards to oversized documents, A3 documents, photos, and much more.

Make sure that any scanner you purchase is reliable, has sheet-feeder capability and a fully searchable format output, and is TWAIN-compliant.

Servers

While not mandatory, it is wise to invest in a server dedicated to storing your

digital documents. A server coupled with a document management system (discussed below) allows everyone connected to the server to view, share, and annotate documents and enables staff to quickly and easily search files and folders to locate all documents containing author-created terms. Storing files in a searchable format on a server greatly enhances the efficiency and productivity of a paperless practice.

Be aware that when storing everything on a local server, the entire office goes down when the server goes down. Therefore, invest wisely in a server with built-in redundancy, and back up your data offsite.

Network switch

A network switch allows your office devices to talk to one another. Going paperless will increase your network traffic, so invest in the fastest possible switch.

IT support

If you don't have reliable and capable IT support, now is the time to find someone to help you make the right choices in hardware and software and be available to help with your ongoing needs. Regular maintenance and upgrades are necessary in a paperless practice.

Law Practice Solutions is a regular feature brought to you by the Practice Management Resource Center (PMRC) of the State Bar of Michigan, featuring articles on practice management for lawyers and their staff. For more resources offered by the PMRC, visit our website at <http://www.michbar.org/pmrc/content> or call our Helpline at (800) 341-9715 to speak with JoAnn Hathaway or Diane Ebersole, Practice Management Advisors.

With the proper planning, hardware, and software, you can transform your life and your practice by becoming less reliant on paper.

Backup systems

Redundant, reliable backup systems are a must—not just for a paperless practice, but for every practice. With a redundant backup, if one system fails, the other is there. A good option is to back up your computer to an external drive or server as well as secure web-based or cloud storage. Then you will have three redundancies: computer, drive or server, and Internet.

Multiple or large monitors

Multiple or large monitors in your paperless practice provide easy access to your data. If choosing a large monitor, opt for a minimum of 27 inches. Since you'll be reviewing documents on screen as opposed to in hard copy, you'll want a dedicated monitor or an area on a large monitor for viewing and working with your digital documents and another to access other applications.

Software Solutions

PDF creation software

Being able to convert a document into a portable document format (PDF) is critical to the success of any paperless practice. Created by Adobe, the PDF is the gold standard for converting documents from their original format (think Microsoft Office or WordPerfect) to a digital format that can be shared, searched, and stored across computer platforms. If not for PDFs, users would have to share and store documents in their original formats. As software becomes obsolete, newer computers and devices can't open preexisting documents. Understanding this concept helps clarify the need for and importance of using PDFs.

Another important argument for converting documents to PDFs is security. PDFs can be secured through encryption; the inability to alter, copy, or print the document; and other ways that give authors peace of mind knowing their work is protected.

There are many PDF viewing, creating, and conversion applications available in the marketplace, ranging from free to very expensive. It's time well spent to fully understand the functionality available with the various applications.

When assessing which application might be best for you, consider some of the following features.

Editing functions

Software should allow users to make minor corrections to the PDF without having to convert it back to its original format. This becomes especially important when creating a PDF from a scanned document. The software should let you collaborate with others by marking up the document (e.g., comment, highlight, strikeout text). If editing is an option, there should be document signing and securing functionality and the ability to redact sensitive information.

Multimedia inclusion

Full-featured PDF software should provide basic multimedia capabilities to add life to plain text documents. At a minimum, the software should allow the addition of images and hyperlinks.

Usability

PDF software should easily create PDFs from many different file types and locations. It should be intuitive and easy to use with an uncluttered workspace.

Support

Getting help when needed can save you valuable time and the frustration that results from figuring it out on your own. Does the software include a help menu? Does its website have videos, tutorials, or articles on usability? Is there a live chat and 24/7 customer support?

Optical character recognition

Optical character recognition (OCR) is the mechanical or electronic conversion of scanned or photographed images of typewritten or printed text into computer-readable text. Basically, using OCR on your documents will enable you to search and accurately retrieve them. Understanding its importance in a paperless practice cannot be overstated.

Many scanners are already integrated with OCR, making it easy to buy a package that meets the needs of your practice. Adobe

Acrobat Standard and Pro versions both have OCR functionality, and several other OCR software options are available for the paperless lawyer.

Bates tool

Having the ability to apply Bates numbers to one or multiple files can be very helpful. When documents bear unique sequential numbers or alphanumerical markings, questions about whether they were or were not produced can be avoided. For example, when 2,000 pages of documents are produced in response to a discovery request and they are Bates numbered, there can be no dispute about whether a particular page or set of pages was produced.

Document management software

Document management software (DMS) is an application used to track and store electronic documents. Numerous such applications currently on the market incorporate naming conventions with lock-down systems and many other functions. DMS can prevent users from developing their own naming protocol contrary to a firm's paperless policy. While coupling DMS with a paperless plan is not a necessity, it can be a lifesaver to ensure uniformity, prompt and accurate document retrieval, and the ability to access documents remotely. Here are some of the features that can be found in DMS:

- Add files from external sources
- Document imaging
- Multiple security levels
- Central document repository
- PDF conversion
- OCR capabilities
- Document workflows
- Version control
- Workflow history
- PDF merge/split
- Search tools
- Metadata and full-text search
- Integration with word processors, mobile devices, and e-mail clients

Some DMS systems are better for larger firms, and others for smaller firms. Here are a few of the players:

- WORLDOX
- Autonomy iManage Worksite
- OpenText eDocs
- NetDocuments

Metadata scrubbers

Metadata is “data about data.” The term itself is ambiguous, as it is used for two fundamentally different concepts. Structural metadata is about the design and specification of data structures and is more properly called “data about the containers of data.” Descriptive metadata, on the other hand,

refers to individual instances of application data and the data content. Regardless of how you break it down, metadata can be totally benign or extremely harmful.

The first step in protecting yourself from the dangers of metadata is being aware that it exists. Spend extra time checking for metadata when working with confidential files being sent to external parties. Invest in software to remove metadata from your files. This software is typically under \$100. There are a number of products available, such as Workshare Protect and Metadata Assistant. Adobe Acrobat is another commonly used law firm application with metadata removal functionality. For more options, use an Internet search engine to find metadata removal software.

Conclusion

There are many benefits to going paperless. With the proper planning, hardware, and software, you can transform your life and your practice by becoming less reliant on paper. ■

JoAnn L. Hathaway is a practice management advisor for the State Bar of Michigan. Previously, she worked as a legal liability claims director and risk manager. She is an Adobe Acrobat certified expert and holds software certifications in Clio, LexisNexis Time Matters, and Billing Matters software. She is active in the ABA Law Practice Management Division and is a frequent speaker on law firm technology and risk and practice management topics.

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