

The Less-Paper Office: How to Do 90 Minutes of Work in 60 Minutes

By Daniel J. Siegel, Esquire

Perception: There is so much technology, that it seems to take me longer than ever to do everything.

Perception: I have way too much paper to ever go paperless.

Perception: I can't possibly work without my papers.

Perception: I'll never get out from under all this work.

Reality: Managing technology, paper *and your time* is easy once you:

- ✓ Harness the power of technology.
- ✓ Reduce your reliance on paper by acknowledging that
 - You don't need to save all of the paper you save;
 - It's faster and easier to rely on technology to handle paper;
- ✓ Organize everything you save electronically.

That's all you need to do. It's simple – providing you are:

- ✓ Open-minded;
- ✓ Willing to explore all of your options;
- ✓ Willing to *actually learn how to use the software you already have*;
- ✓ Willing to reduce or eliminate paper; and,
- ✓ Willing to automate as many routine tasks as possible.

Businesses, law offices, organizations, and individuals will often make decisions or changes in their operations that cost significant amounts of money, yet they are often hesitant to invest even a small amount for the technology, including training necessary to improve their day-to-day operations. By ignoring the ways technology makes things easier, they are stubbornly

clinging to the belief that the old way of handling paper and managing their time is still the best and most efficient method of doing business.

In fact, by doing their work the “old fashioned” way, most people take longer to accomplish most tasks. And every time they handle a piece of paper, they are actually “wasting” time. Rather, if they used just a bit of the technology available, they could probably do 90 minutes of work in 60 minutes.

Consider the following well-known example: If your time is worth \$150.00 per hour, and you can save just 6 minutes per day by using technology, a \$1,500.00 technology investment will pay for itself in less than five months (6 minutes x 5 days per week x 50 work weeks per year = 25 hours = \$3,750.00). Although this makes economic sense, many people simply refuse to trust that proper software plus sufficient training to use it can revolutionize the way they operate.

Train, Train, Train, Learn, Learn, Learn

Were you trained to drive a car? Do you take continuing education courses and attend seminars and programs to enhance your professional knowledge? Do you want to learn more so that you can do your job more effectively? Hopefully, the answers to each of these questions is “yes.” The same answer applies to technology. Perhaps you have received training in some specialized, job-specific programs you use, but have you been trained how to use Windows, Word, Outlook and the other programs that you rely on – perhaps even more than you rely upon that specialized job-specific program your organization or business uses?

But, for various reasons, most people have never been trained in the rudimentary programs that are so crucial to their daily activities. Many schools, for example, require students who graduate to have a working knowledge of Word, Excel and PowerPoint. But do they teach the students how to use the programs? Generally not. After all, students from elementary through

high school must graduate with certain levels of proficiency in math, science, history and other subjects, but the schools do not expect the students to learn those subjects through osmosis.

Why is computer software treated differently? In reality, it should not be. While students may not need four years of Microsoft Word training, a semester of practical instruction would help them immeasurably throughout their lives – just as students who were “forced” to learn typing are more adept at the keyboard than their “hunt and peck” counterparts. Think how much time those proficient typists save. And in many cases, not only do they save time, but they also eliminate or reduce the need for hiring a full-time secretary for those workers.

Acknowledge the need to reduce your use of and reliance on paper

Jane M. VonBergen of *The Philadelphia Inquirer* authored a series of articles in 2006 about the cost of clutter to businesses. In her initial article, she outlined the time and cost of paper shuffling and the inevitable search for lost paper:

Every lost piece of paper costs a business \$120.

Imagine that.

In fact, 15 percent of all paper handled in businesses is lost, according to the Delphi Group, a Boston consultancy group, and 30 percent of all employees' time is spent trying to find lost documents....

In 2000, consultants for the Connecticut-based Gartner Group - the same folks who reported the lost-paper cost - estimated that, by 2003, the average professional would waste 30 percent to 40 percent of his time on "document-related non-value-added tasks," i.e., paper shuffling. Now some of that wasted time has moved from paper to electronics, with the volume of e-mail projected to rise 30 percent a year through 2008.

Let's figure that the average professional makes at least \$1,000 a week - that's 15,600 to 20,800 wasted dollars per year per worker. Keep on multiplying. A company with 100 professionals could lose more than \$1.5 million a year.

Canadian analysts calculated in 2002 that poorly managed information was costing the Canadian government \$870 million a year in wasted time.

And in America, consultants found we're no better at managing our time. Professionals lose 2.1 hours of productivity a day to "unimportant interruptions and distractions." That's \$588 billion a year, according to Basex Inc., a research and consulting group in New York.

But from a personal perspective, it's even worse. Disorganization on the job makes people stressed, according to another study, from the office supply company Esselte Ltd., and office stress sends out ripples of difficulties:

“Getting on top of the clutter: The financial and psychological costs of disorganization,” by Jane M. Von Bergen, *The Philadelphia Inquirer*, February 26, 2006.

Think about it. Paper equals clutter, and every time you or your staff handle a piece of paper, you are “wasting time” and losing money. That is why it so important to reduce your reliance on paper. There are many ways to create “The Less Paper Office,” but the key is learning to do virtually everything you have done on paper with your computer. At its core, this means document “management;” at its best, it means an integrated plan that encompasses everything you and your business do.

What is document management? Document management is nothing more than the ability to store, locate and retrieve documents using your computer. You can devise a system yourself, or you can deploy a document management system (DMS), *i.e.*, a computer program (or set of programs) designed to track and store electronic documents and/or images or copies of paper documents. Either way, a document management system will typically focus upon the creation of uniform procedures for:

- ✓ Storing documents
- ✓ Retrieving documents
- ✓ Organizing documents
- ✓ Securing documents to prevent loss, tampering or destruction
- ✓ Handling sensitive information
- ✓ Protecting documents from fires, floods or natural disasters
- ✓ Retention and/or destruction of documents

- ✓ Distributing documents
- ✓ Creating efficient workflows
- ✓ Collaborating on documents
- ✓ Authenticating documents

In addition, document management systems commonly have additional features, including:

- ✓ Metadata

Metadata is information about data and may describe, for example, how, when, and by whom it was received, created, accessed, and/or modified and how it is formatted. In a document management system, metadata is typically stored for each document. Some document management systems may extract metadata from documents automatically or prompt a user to add it. Some use optical character recognition on scanned images, or perform text extraction on electronic documents, so that the extracted text can be used to enable users to locate documents by keyword or full text search capability.

- ✓ Integration

Many document management systems integrate document management directly into other applications, such as case management programs, so that users may retrieve existing documents directly from the document management repository, make changes, and save the changed document in the repository as a new version.

- ✓ Capture

Most document management systems use Optical Character Recognition (OCR) software to convert digital images into machine readable text; this process is called capturing.

- ✓ Indexing

A hallmark of document management software is its ability to index documents and store unique document information.

✓ Storage

Document management systems provide for uniform storage protocols for documents, including where and for how long they are stored, and when or if they are destroyed.

✓ Retrieval

Retrieving documents easily is one of the most important functions of this software. While it sounds simple, retrieval of electronic documents can be complex. Thus, the ability to search easily for documents is very important.

✓ Security

Document management systems generally have very advanced security features that allow administrators to restrict who can retrieve and store various types of documents, and under what circumstances. Thus, for example, highly confidential documents may be handled very differently from routine correspondence.

In sum – you want to use less-paper.

Even if you don't purchase document management software, you can accomplish most of these changes by yourself, as long as you and your staff are consistent in how you handle your documents electronically.

The “Less-Paper Office”

The “paperless office.” Remember that concept? Like the idea that paper checks would disappear, the promise of a paperless office remains a pipedream for virtually every business. After all, the mail still comes, faxes continue to fly out of the machine, and those e-mail printouts never seem to end, right? While an office without paper is probably not a reality for most people,

there are options that will reduce the amount of paper you use while increasing your and your firm's efficiency.

None of the suggestions I offer requires radical changes to your office's procedures, and most merely require hardware and software you probably have, or may not even realize you have; in fact, most of these suggestions can be easily implemented with a scanner, preferably one with a sheet feeder, and a CD burner. What you also need is the willingness to tweak the way you (and your staff) do things.

Consider a typical client/customer/agency file. It is organized into sections, perhaps correspondence, memoranda, contracts, etc. Regardless, you should have all of these scanned to your computer or your server, and named so that you (or anyone else) can locate the documents easily. There are two reasons to do this. First, it is all too easy to misplace documents, and scanned copies serve as insurance. Second, when the client calls, you no longer have to place the client on hold, get up from your desk, search for the file, and then, once you find it, rummage through the morass of papers to locate the document you need. Instead, you simply locate the document on your computer, open up the file, and you are ready to discuss the document in seconds. You are more efficient, and your client is impressed by your ability to discuss the document and their project case at a moment's notice.

Let's jump ahead a bit. Suppose you are involved in a project in which you have to review voluminous records, encompassing dozens, if not hundreds or possibly thousands of pages. In a traditional setting, you would look through hard copies of every document. That is a lot of dead trees. Imagine if the records were electronic, indexed and searchable so that you could locate any item in literally a click of the mouse.

Why receive records electronically? There are numerous reasons. Your computer generally comes with the basic software needed to review these files, so you are already set up to do this. In addition, when you need to review the file, if you only print and highlight the truly relevant documents, they will be much easier to find instead of having to fumble your way through reams of paper. Thus, I recommend doing an initial review of the documents on your computer and printing only the pages that *may* be necessary.

For my nickel, every document should also be scanned and OCRed (optical character recognition). This process not only renders the documents searchable, it generally also allows you to copy portions for use when preparing other documents. As a bonus, if you misplace a document (which of course will “never” happen), there is a copy readily available.

One of the most important reasons to scan documents is the ability to OCR each one simultaneously. With the right software and little effort, you will be able to search virtually all of your documents in one pass, and finding that needle in the paperstack will be far easier. Although most software can OCR handwritten documents, the results vary based upon the legibility of the writing and sophistication of the software.

Consider this real-life example from my own law practice. In a recent case, plaintiff’s counsel had suddenly named a new expert. Although he worked for the same company as another expert, we could not fathom why his testimony would have any more relevance than the previously named witness. I opened up my Adobe Acrobat index and searched for the witness’ name. Lo and behold, his name appeared once in about 5,000 pages of documents. Where? In one document in which another witness had cited the newly named expert’s treatise, which of course supported plaintiff’s theory of recovery. Obviously, when he identified this witness, plaintiff’s counsel had intended to use this treatise to bolster his case, without ever disclosing

that “little” fact beforehand. Needless to say, we promptly filed a Motion in Limine to preclude testimony by this new witness.

Jumping ahead, your work is concluded. Now what? When you close the file, if you have saved copies of the documents on your computer, you can burn a CD, store it with the files on it, and dispose of the documents. You will require far less physical storage space and, should the need arise, you can quickly retrieve the documents from your computer (or an archive) or directly from the CD you stored with the file.

Now that you have read what to do to reduce the paper in your office, the question remains: how to do it? The answer is by using a scanner, a CD burner, a tif viewer, and PDF software, which most offices already have. In smaller offices, with only one or two staff members, the idea of going paperless may seem particularly daunting. For those offices, I recommend implementing these steps progressively. In most instances, once you begin the transition to electronic storage, it becomes second nature.

Regardless of how much of this process you adopt, you must also backup your computer regularly.

Scanners

Scanners have become a necessity in most offices. A scanner analyzes a document or other image and processes it in a way that allows you to save it on your computer. If the document contains text, a scanner can perform an OCR, thus allowing you to search and, depending on your software, use the text in other applications. If the document contains an image (picture), the scanner can save it in a manner that allows you to alter or enhance the image, print it out or use it elsewhere.

In recent years, scanning technology has improved dramatically. Sheetfed scanners have become far more common and much more affordable, and allow you to scan large documents at the push of a button. For around \$300.00, you can purchase a scanner such as the Fuji Scansnap or Xerox Documate with a 35 to 50 page sheet feeder, which is sufficient for most small to mid-size offices. In addition, large copiers generally also serve as scanners. Either way, scanning is as easy as making a copy.

But the key to successful scanning is in the software. Most manufacturers supply all of the software you will need for free when you buy a scanner. For example, Hewlett Packard offers user-friendly software that makes scanning a snap; Fuji generally provides a copy of Adobe Acrobat (its mid-range version) with many of its scanners. Scanning is easy. You either open the software or click on the scan button, and the scanning begins. Once the scanning is over, the software asks you what format to save the images in, generally a pdf, and where to save it. Of course, if you need to save your document as an image, such as a tif or jpeg, you can do that just as easily. The advantage of the pdf format (rather than a jpeg or other “image” format) is that, with proper software, you can search one or more documents for keywords.

After You Scan – You Need Software

Scanning documents is just the first step. After your documents are scanned, you need the proper software to review them. Selecting the correct software for handling your documents is crucial to reducing paper and increasing efficiency. If you save your documents as pdfs, you can review them with the free Adobe Acrobat Reader (downloadable at <http://www.adobe.com>). Adobe Reader allows you to view your documents, but not much else. If you purchase Adobe Acrobat, or comparable software, however, you can accomplish much more. For example, Adobe Acrobat easily performs an OCR on a document, allowing you to search its text, export it

to Microsoft Word, or use it in other applications. Adobe Acrobat is relatively expensive (ranging from \$300 to \$500 per user/license, depending on the version); other companies offer less expensive alternatives, but without all of Adobe's bells and whistles.

My favorite feature in Adobe Acrobat is its ability to index documents (Adobe calls it a "catalog"). In the example above, the index encompassed over 400 documents, ranging from pleadings to exhibits to legal research to correspondence. It took about three seconds for Adobe Acrobat to find the one instance in which the newly designated expert witness' name had appeared in any of the documents. Without the index, we might not have learned until trial about the witness' treatise.

While Adobe is the standard for pdfs, the world of images (tifs, bmps, jpegs, etc.) is far different, and requires image software, called a "viewer." A viewer is a program that displays the contents of an electronic (digital) file. A viewer may be a stand-alone program or a component within a larger program. Generally, stand-alone viewers are more versatile than those contained in other programs; however, you cannot OCR an image. Thus, viewers are not an inexpensive alternative to pdf software.

Windows PCs come with Microsoft's viewer, which is extremely basic. If you plan to view images frequently, then the Microsoft viewer, which requires a user to open and close every image manually, is inefficient and will become a source of increasing frustration. There are many other viewers that allow users to scroll from image to image without having to open and close each document. Users tend to have their own preferences, and most viewers are relatively inexpensive and generally offer free trials. Among the more popular viewers are IrfanView (<http://www.irfanview.com>), which is free for non-commercial use, and ACDSee (<http://www.acdsystems.com>), which is extremely easy to use, and sells for about \$50.00.

File Naming

No matter how you implement your less-paper office, one factor critical to its success is creating a file-naming protocol. Where possible, your office should use a protocol that makes locating files easy, and allows anyone to determine the contents of a given file. Document management software (DMS) automatically performs this function, although many offices do not have DMS. For those offices, files should still be organized in an easy-to-use style, generally by client/organization name (after all, who remembers every account number?). There are then, generally, subdirectories for correspondence, memos, invoices, contracts, etc.

After you establish a file organizational structure, you should define a file-naming protocol. For example, save all letters as “Ltr to XXXX re YYYY, Date.” I recommend that dates be in YEAR-MONTH-DATE format (2005-10-28) because it makes sorting similarly named files far easier. Thus, if you have four letters to your client, they will sort in date order when you are searching.

Email & Faxes

More and more, businesspeople and their clients communicate by email. The volume of email in some offices is overwhelming, and if the communication involves a client, you almost certainly have to save a copy – not only of the email, but also of your reply, and the reply to the reply, and the reply to the reply to the reply, etc. At times, the volume of email seems infinite. There is no reason, however, to print out every email you receive. The ubiquitous Microsoft Outlook, and virtually every other email program, allows you to easily store email on your computer. So, unless the email is *that* important, don’t print; instead, hit the save button.

As for faxes, old habits die hard. Many offices continue to rely on the machine, but there are better alternatives. For smaller firms, an online service such as efax (<http://www.efax.com>)

may be the answer. Efax assigns you a fax number and sends your faxes to as many as five different email addresses, all for one annual fee, which is generally less than the cost of a fax line for a year. For larger offices, programs such as Right Fax (<http://www.captaris.com/rightfax>) may be the answer, albeit at a significantly greater cost. Using efax or RightFax, you can view an incoming fax on your computer in a host of formats, including pdf and tif. If the fax is unimportant, you can delete the email (without ever wasting the paper to print it). If it is important, however, you can save it to a client's file and, if necessary, print a hard copy. Most electronic fax programs also allow you to send faxes, but for most users the real convenience is the ability to receive and review faxes on their PCs.

Backup Software

This article has focused on ways to reduce paper by storing more data on your computer. If you intend to do so – and even if you do not – you *must* backup your data in case of a system crash. Although it is harder to lose an electronic file than a paper one, accidents happen, and you must backup your data daily (and religiously) to avoid arriving at the office only to learn that all of your data – in essence, all of your work – has been reduced to a large useless heap of metal. Regardless of how large or small your office, performing daily backups is a necessity.

It is unlikely that most businesses will ever have a truly paperless office. Instead, many can and should have an office with less paper. If implemented correctly, a proper backup solution provides insurance against a hard drive crash and, more importantly, gives you the peace of mind to know that, when and if you go paperless, everything you need is just a moment away – on CD.

There Are Many Types of Time-Saving Software & Hardware

Among the types of technology you can use to accomplish more in less time (in law offices and other businesses) are:

- ✓ Back-Up Software (Onsite or Offsite) – Performed Regularly
- ✓ Bates/Document Numbering Software
- ✓ Calendaring Electronically
- ✓ Case Analysis Software
- ✓ Case/Matter/Membership Management Software
- ✓ Closed File/Case Procedures – Standardized & Electronic
- ✓ Database Software (Such as Microsoft Access, To Maintain Lists of Data)
- ✓ Deposition/Document Review Software
- ✓ Desktop Scanners or Network Scanners
- ✓ Desktop Search Software (Such as Copernic, Google Desktop, etc.)
- ✓ Dictation/Voice Recognition Software
- ✓ Document Management Software (To Assist with Proper Electronic Document Storage)
- ✓ Document Scanning (To Achieve a “Less-Paper” Office)
- ✓ Document Viewers, Including Adobe & Other Products
- ✓ Documents – File Naming Protocols
- ✓ Electronic Document Production
- ✓ E-mail Rather Than Snail Mail
- ✓ Fax Software & Services (To Send & Receive Electronically)
- ✓ Form Creation Software (Or Using Adobe to Create & Fill Forms)
- ✓ Medical Records – Electronic Procurement (In lieu of hard copies)
- ✓ Metadata Removal Software
- ✓ OCR (Optical Character Reading) Software (To Permit Easy Searches of Scanned Files)
- ✓ Paper Use Reduction
- ✓ PDAs & Blackberry Devices
- ✓ PDF Creation Software (Such as Adobe Acrobat Standard & Professional or PDF Create)
- ✓ Portable Scanner (Such as Neat Receipts & Similar Devices)
- ✓ Research Online
- ✓ Time Billing Software

- ✓ Time Line Presentation Software
- ✓ Trial Presentation Software
- ✓ Word Processing – Use Templates/Standardized Document Preparation Methods

Conclusion

You really can do 90 minutes of work in 60 minutes. All you need to do is stop handling paper, and transform your paper files into electronic ones. While the transition takes a little adjustment, I have yet to meet someone who, upon going “less-paper,” ruminates about the good old days with all those piles of files.