

The Paperless Office – 2nd time lucky?

by Peter Garsden

In a previous article, long, long ago, I described how we tried to go paperless in 2003, but failed, largely for human reasons. On 6th September 2010 we succeeded. Why? This article explains.

We have been scanning in post since 2003. I personally have been paperless ever since then, but no one else joined me. In those days we did not have a case management system, but we saved documents on our computer system - effectively an electronic replication of the filing cabinet.

In 2003, I tried to introduce the system too quickly. I did not appreciate that the Fee Earners were not as confident with technology, as I thought. There was a training requirement. When the cosiness of a paper file disappeared, people felt insecure, and insisted we go back to paper. I agreed. They said that when we got a Case Management system we could give it another try. We kept the electronic file system and post scanning, but allowed them to keep their paper files, which meant we were doing the job twice i.e. scanning in and saving the paper. It did mean, however, that as we had an electronic copy on the server, we were not always forced to retrieve a file from archives. The paper archive cost escalated to £800 per month. Something had to be done.

The Case Management system we introduced in May 2008 is called "Proclaim" from Eclipse Legal Systems in Bradford – www.eclipselegal.co.uk. Eclipse is a leading provider with over 13,000 users nationwide. Its tailor made batch scanning system puts all incoming mail straight into the file without having to go through the email system, which is how we used to do it, with the consequent load on our email server. Files are saved in TIFF format, but one can use PDF if preferred. As both file types are globally recognised, obsolescence should not be a problem.

Once we had installed Case Management, and not wanting to make the same "too quick, too soon" mistake as last time, I tried to encourage the fee earners to find their own way to a paperless office by means of various meetings, and discussions. There was quite a lot of nervousness about getting rid of a paper file, and issues surrounding original bits of paper. Some of them opted for a "part paperless" system of keeping incoming post but not saving anything outgoing. To me this was worse than either a full paper file or completely paperless, because the file only told half the story.

My cashier worked out the savings we would make with a paperless system and came up with some staggering figures. I have to emphasize that we are a small firm with only 27 staff, 16 of whom are fee earners. She estimated that we would save around £60,000 a year by a switch to a paperless system. This includes costs related to secretaries and clerical assistant filing, archiving and shredding but takes no account of the extra time staff spend trying to find lost paper or moving paper from one place to another. The stationery and clerical costs are reduced by the move to paperless self evidently, but we still have to send out letters to clients, many of whom are in prison. In a different practice, where email is used more, the savings would be even greater.

I decided to take the bull by the horns and arrange an anonymous referendum. The votes were 14 paperless, 9 partially paperless and 2 for paper files. Despite a rather tense meeting, I announced that in 6 months time we would go paperless to allow people to adapt. D-Day was 6th September 2010. It passed seamlessly and without drama.

The following might be useful if you are thinking of taking the plunge:-

1. **A Case Management system** with its batch scanning delivery system and document management is very important.
2. **Two screens** are a big advantage, so that one can look at the document on one screen, and the Case Management system or Email inbox on the other.
3. **Originals?** - We have a rule that, if you want to keep a document, you have to say so. Keep it simple. We obviously keep original client documents, signed statements, photos etc. We tell clients we will destroy their records at the end of the case unless they ask for them back. In reality, most documents we hold are copies of documents held elsewhere. This article does not pretend to be a legal analysis of when only original paper will suffice, but the world is moving heavily towards digitisation. Cheques are already a thing of the past, and I am sure

that in years to come there will be a way round original signatures. The Land Registry is nearly there.

4. **Bundling** - Proclaim comes with pdf bundling, which we can use for automatic pagination of scanned documents. Although in its infancy we will be sending them to the other side, the Courts, and Counsel instead of boxes of paper.
5. If a bundle is too large for email (a common problem) we use an internet file sharing system called **Drop Box** which is free for limited use – www.dropbox.com and inexpensive. One sends a file to a confidential folder protected by user name and password, then invites another user with an email address to share the folder and download the contents. It is simple and easy to use. Counsel recommended it to me.
6. If going to **Court** or a client's house, one can take the whole file on a laptop (dialling into our server is not a big success because the Court connections are not reliable enough – lack of government investment!). If you need a document, then take a printer with you, or put it on a memory stick and ask the Court to print it for you. I do find, however, that the cost of printing at Court (£5 minimum) is prohibitively expensive. You can draft an order digitally there and then. If you have an electronic pdf bundle it is quicker to find a document digitally than on paper. I now take notes of evidence on a laptop. I find I can type quicker than I can write, and my typing speed is only 45 wpm.

So what are the advantages?

1. **Save trees** – our shredding company, who come once a month, tell us we will save about 65 trees a year as all our paper will be recycled.
2. **Save money** – obviously – my estimate above is conservative.
3. **Save space** – imagine a room without the clutter of piles of paper – and relax.....
4. **Save time** – to find an electronic document takes a fraction of the time it takes to find paper.

What are the disadvantages? Because I am biased, then the only one I can think of is a spreading backside caused by not enough walking round the office, but you can always get round that by cycling to work – I don't but should....

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Faris Humadi, the firm's IT Manager, adds:

Scanning in all the post every morning can be very time consuming, so we acquired 2 very good industrial scanners, a Fujitsu and an Epson, which are compatible with our Case Management system. This means that our post is scanned-in correctly and on time.

Going paperless also means the desk space you once needed is now the space on your screen. Therefore the use of two screens for all the staff is imperative as it gives them more 'desk space'.

As files are no longer needed in our office, solicitors can work from home. To make this possible we invested in a good terminal server allowing staff to connect to the office server and work as if they were in the office.

Most crucially if one is to go paperless having adequate backup of data is essential, because if files are deleted accidentally then they need to be recovered efficiently. We are investing in multiple types of backup procedure including offsite backup using cloud technology.

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