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I’m Buried in Paper - What Can I Do?

I. **PRELIMINARY DISCUSSION**: It's not likely that any office can eliminate paper entirely. The idea of this seminar is that you can still make a significant improvement in the efficiency of your office by simply reducing the amount of paper you manage and taking some of it out of the workflow. Furthermore and maybe more importantly, the tools necessary to accomplish this are not expensive. They're off-the-shelf technologies and it's likely that utilizing them will not even require the involvement of your IT/tech support. For many of you reading this, the more you can engage in self-help, the better.

II. **SCANNERS IN YOUR OFFICE**:

A. **The Paperless Office**: For most offices, a truly paperless office just not achievable. Sometimes you just need the paper and there's no stopping the flow of paper that others send you. However, this seminar will show you how to reduce the paper you manage significantly and not only is this achievable, the benefits are dramatic. With common-sense techniques and basic hardware and software combinations, the mountains of paper will shrink. You'll waste less time searching for paper files, you'll have a healthier bottom line, and you'll likely enjoy your job a little more.

B. **Buying Scanners Doesn't Solve the Problem**: I teach a CLE class on paper reduction and I always begin by asking the audience how many of them have scanners. Every single hand goes up. In spite of that, they all still feel buried in paper. So the point is that scanners alone don't solve any problems. The solution lies in how you use the technology you buy. Scanners are just the hardware piece. Just as important is the software you're using to scan and search; the protocols/processes you're following; and the training you provide to your people.

C. **Terms and Definitions You Need To Know**: Here are some terms I'll refer to later.

1. **Imaging**: A scanned document is essentially a digital photograph of the original paper document. Imaging is the process of using a scanner and computer to capture (scan), store, manipulate, and display an image (an image is a visual representation of something). In document imaging, the emphasis is on capturing, storing, and retrieving information from the images (which are often mainly images of text).

2. **Digital Paper**: This is the product of imaging. After you scan paper documents, you end up with electronic copies of them or "digital paper." They look exactly like the original documents from which they were created and can be printed again if a paper copy is required. However, the digital version is stored on your network and is only printed if necessary. Since digital paper is stored on your network, it's much easier to find.
3. **Scanner**: A scanner is a device connected to a computer which captures images from photographs, posters, magazine pages, and similar sources for computer editing and display. A scanner functions similar to a copier and comes in hand-held, sheet-fed, and flat-bed types and for scanning black-and-white only or color. Very high resolution scanners are used for scanning for high-resolution printing, but lower resolution scanners are adequate for capturing images for computer display. Scanners usually come with software which lets you re-size and otherwise modify a captured image.

4. **TWAIN - the Common Language of Scanners**: TWAIN is a widely-used program that lets you scan an image (using a scanner) directly into the software program you're using to store or manipulate the image. The TWAIN driver runs between a software program and the scanner hardware. TWAIN usually comes as part of the software package you get when you buy a scanner. TWAIN was developed by a work group from major scanner manufacturers and scanning software developers and is now an industry standard. I've read several articles falsely claiming that TWAIN is an acronym developed from “technology without an important name.” However, the TWAIN Working Group says that, after the name chosen originally turned out to be already trademarked, the group came up with TWAIN, deriving it from the saying “Ne'er the twain shall meet,” because the program resides between the hardware and the software.

5. **OCR (Optical Character Recognition)**: OCR is the recognition of printed or written text characters by a computer. Advanced OCR systems can recognize hand printing, but most of them only interpret machine print. When a text document is scanned into the computer, it is turned into a bitmap, which is a picture of the text. OCR software analyzes the light and dark areas of the bitmap in order to identify each alphabetic letter and numeric digit. When it recognizes a character, it converts it into ASCII text. Hand printing is much more difficult to analyze than machine-printed characters. Old, worn and smudged documents are also difficult. OCR is currently in use by libraries to digitize and preserve their holdings; OCR is also used to process checks, credit card slips and sort the mail.

6. **PDF (Portable Document Format) Files**: PDF is a file format that captures all elements of a printed document as an electronic image that you can view, navigate, print, or forward to someone else. PDF files are created using Adobe Acrobat, Acrobat Capture, or similar products. To view and use the files, you need the free Acrobat Reader, which you can easily download for free (www.adobe.com). Once you've downloaded the Reader, it will start automatically whenever you want to look at a PDF file. PDF files have become the de-facto standard method for distributing electronic forms on the Internet. This is the format we recommend that you create your digital files in.
7. **File**: For purposes of this discussion, we're going to use the term "File" to mean any collection of documents and matter-specific information. That information can be stored in paper files or electronically as digital paper or database records.

8. **Document Management ("DM")**: DM is the process by which we store, classify, search, share, and eventually retrieve our documents. Before going further, this would be a good place to define what we mean by "document." In the context of DM, a document is essentially a file. A file, in this usage, is an electronic, digital container of information. A document may be a word processing file, or it may be a graphic image, or any other discrete, identifiable information unit that can exist within a computer system.

9. **Document Management Systems ("DMS")**: Document management systems (DMS) are simply hardware/software systems that automate the DM process. Specifically, a DMS provides an organization with the tools to create, manage, control, and distribute electronic documents.

Traditionally, operating systems such as DOS and Windows have failed to offer the tools and resources necessary for managing documents. The principal case in point is the paltry 8+3 file naming constraints enforced by DOS and Windows 3.x. Not until Windows 95 did the Microsoft+Intel platform offer the possibility of long, "descriptive" file names.

Understandably, the tools used to create and distribute files—word processors, spreadsheets, graphics programs, and the like—have concentrated on their core functionality, leaving document management to the operating system. Because the operating system wasn't very good at this, document management issues were largely left unaddressed. Companies (such as law firms) that create huge numbers of documents, and that have invested their intellectual capital in the content of these documents, often turn to document management software to overcome this problem. As more "corporate memory" is captured in electronic documents, more firms are recognizing the need for a document management system.

Consider that most department managers have a much better idea of the contents of their supply cabinets than they do of the electronic documents generated by their group. We're talking about the critical intellectual assets upon which their business relies. Clearly, there is a problem here.

### III. EXTRICATE YOUR PRACTICE FROM THE AVALANCHE OF PAPER:

**A. The Typical Two File Approach**: Most offices maintain two files for every client/engagement/customer. One is paper-based; the other is electronic.
1. **Paper File = Primary File**: At most offices, the paper file is the reservoir of all information related to that particular client or event and therefore, it's the primary file. Paper files normally contain every document that was received (mail, faxes, etc.) plus copies of everything sent out. Emails are often printed and dropped into the file, hand-written notes are usually present, and "while you were out messages" often find their way into the file as well.

2. **Electronic File = Secondary File**: The electronic file is comprised of documents stored in a folder structure on someone's computer or on a server. The electronic file typically contains only the electronic versions of documents generated internally (Word or WordPerfect files). Since it contains only a small subset of the information in the paper file, the electronic file is usually of limited use and is therefore the secondary file.

Keep these terms (primary and secondary files) and the difference between them in mind as they will become important as this discussion progresses.

**B. File Management and Tracking Problems**: For most offices, paper overflow, file management and tracking is one of the biggest problem areas (if not the biggest). Some of the problems firms experience are as follows:

1. **The Expense of Hunting for Files**: In almost every office, time is wasted every day looking for paper files.

   To determine what it costs for someone to do something in your office, you first have to determine that individual's cost per hour. To calculate the total annual cost for any particular employee, take their annual salary and multiply by 1.4 if health benefits are provided and 1.15 if benefits are not provided. Now divide by 2,080 work hours per year and you've got an hourly cost for that individual.

   So let's say that someone earning $45,000/year spends 5 hours a week looking for documents and files. $45,000 x 1.4 = $63,000. Divide by 2,080 and you've got an hourly cost of $30.29. 5 wasted hours a week is costing your organization $161.45 per week, $645.80 per month and $7,749.60 per year.

2. **Paper Files Can Only Be In One Place at a Time**: We all know this, but it creates problems. If I find the paper file I've been looking for, then I've "captured" it and no one else can look at it. In other words, the act of removing a file to work on it causes that file to be lost again to everyone else in my office because they don't know where it is. There may have been a few people in the office who actually knew where the file was when I found it. Now that I've taken it, they may be running around the office asking, "who took my file??" By finding and taking the file, I have unwittingly annoyed and stressed those who knew where it was when I found it and are expecting it to still be there when they go looking for it.
3. **Paper Files Are Not Sharable**: You can share a paper file no more easily than you can share a book you're reading. When was the last time you tried to do that?

4. **If You Can't Share, You Can't Collaborate**: If you're all paper and you want to share your file, you're spending money on lots of copies, shipping boxes and the whole process is slow.

5. **Finding the Document Once You've Found the File**: Once you locate the paper file, now you begin the second search - finding the individual piece of paper within that file.

6. **Paper Files Are Not Searchable**: If a paper files were "searchable," you would be able to instantly locate every document from any file in your office which contains certain words or has certain characteristics (e.g., it is a thank-you letter). You obviously can't do that with your paper files. Further, paper files do not contain a table of contents and although they may be have separate sub-parts for topical segregation, that doesn't mean that people who deposit paper into the file have actually utilized that organizational structure. It also doesn't mean that things are actually clipped into the file, nor that the items in the file are in any kind of chronological order. In other words, the file may be (and often is) a mess. That being the case, now you have to find that ONE piece of paper you're looking for among hundreds, maybe thousands of pages, possibly in no particular order. Depending on the size and organization of the file, you may be faced with a bigger search than finding the file in the first place.

7. **Accessing Data on Paper Is Slow**: We're in the age of instant information. However, if your data and project information is locked up in a paper file, you're at a significant speed disadvantage.

8. **Files Are Not Updated in a Timely Manner**:
   
a. **Most Hated Task**: Almost every piece of mail that comes into an office ends up in a paper file somewhere. Of course, those files must be found first, updated, then re-filed into a cabinet (or more likely stacked on someone's desk or the floor of someone's office). Anyone who has ever been saddled with the task of filing a pile of documents/mail into paper files knows how unpleasant it is. If you've never done it yourself, just ask your admin staff which aspect of their jobs they find the most mind-numbing, frustrating and distasteful. "Filing" is probably the answer you'll get.

b. **The Filing Dead Zone**: Human nature dictates that if you give someone a task they detest, they will put it off as long as possible. That is usually what happens with filing. At any given time, the person responsible for filing in your office probably has a
nice stack of unfiled documents sitting around somewhere. The time gap between receipt of a document and its ultimate insertion into a file in your office can create problems. During that time, those unfiled documents are effectively lost.

9. **More Paper Means Higher Operating Costs:** Efficiency is the key to maximizing a company's profitability. Managing fat paper files is labor intensive and reduces any office's efficiency on all fronts.

10. **More Paper Means Limited Mobility:** If you have 4 files to take with you somewhere and they're reasonably thick, you're going to need a bag or a cart or a box. This is unwieldy, annoying and difficult.

11. **Expensive Storage:** Large paper files occupy a lot of space and filing cabinets are expensive and bulky. If you rent office space by the square foot, you're paying for your filing cabinets every month. More importantly, storage for closed files is VERY expensive. Closed storage is also typically off-site and disorganized. This means that finding and pulling old files is also expensive in terms of time spent.

IV. **NEW SOLUTION TO AN OLD PROBLEM - GO DIGITAL:**

A. **Refocus On the Digital File and Digital Paper:** Short of a global position tracking device affixed to every file in your office, there may be no perfect way to track them. Since you can't look over everyone's shoulder when they're working on a file, there is probably no way to enforce organizational protocols. But all of those approaches are focusing on the paper file. We frankly feel it's pointless trying to figure out a magical way to organize, store and retrieve paper files because of their inherent, unavoidable shortcomings outlined above.

We also accept the proposition that banker's boxes and paper file folders are not the future of file management in 21st century law firms. Since we cannot change the nature of a paper file, we propose a solution focusing on the electronic or digital file discussed earlier (see Article III.A. above). Recall that the paper file is the primary file because it contains everything (incoming and outgoing) while the electronic file typically contains only outgoing materials.

B. **Why Do We Need A New Solution in the First Place?**

1. **The Question You're Asking Yourself:** All of this begs the question: You've been operating with paper for so long, why do you need to change now?

2. **Business Has Sped Up:** Everything about business has sped up significantly in the last 30 years, and technological advances are largely responsible for this. Thanks to faxes, email, cell phones and even instant messaging, communication lines are open all the time. Information for which we used to fill out request forms and wait (during normal business hours) is now available on the Internet 24 hours a day. Schedules are
tighter because they CAN be. Computers enable us to handle more work with fewer people; and mobile technology (such as a laptop and handheld computers) enables us to work almost anywhere, anytime. In sum, every other means by which we acquire information and complete our work has gone into warp speed EXCEPT the means by which we add to and extract information from our paper files. This has become the bottleneck in our efficiency.

3. We're Being Buried In Paper: Maybe the worst tech invention in the last 40 years was the photocopier. Before copiers, it was difficult and expensive to make copies. We relied upon carbon paper, mimeograph machines and other inefficient means to create copies. Today, it's incredibly fast, easy and inexpensive. As a result, every paper file has more paper associated with it than ever before. We're all straining under the weight.

C. KEY POINT - Make Your Digital File Contain Everything In Your Paper File: The key idea is to elevate the status of your electronic file from secondary to primary by adding everything from your paper file to the digital file using a scanner.

V. IMPLEMENTATION STEPS FOR A SUCCESSFUL PAPER REDUCTION SYSTEM: The approach here is to use a scanner to add incoming documents to your digital file. What you want is an accurate representation of what the original document looked like. However, you also want the scanned documents to be full text searchable. This does not mean that you want to convert your scanned documents into Word or WordPerfect files. You simply want to scan for archival purposes, HOWEVER, you need to be able to find those documents again in the future.

A. General Outline of Steps: These steps are discussed in greater detail below, but here's the road-map.

1. Ensure You Have Redundant Backup Systems and Security
2. Buy Scanners
3. Buy Scanner Software That Creates Searchable PDFs
4. Acquire Search Program or Document Management System ("DMS")
5. If no DMS, Consolidate Folder Structure and Establish File Naming Conventions
6. Conduct Training for All Staff
7. Digitize Incoming Documents
8. Store Email Electronically
9. Write Down Your Scanning Protocols

B. Ensure You Have Redundant Backup Systems and Security: Before you undertake a paper reduction strategy as outlined herein, you need to make sure you have bullet-proof backups. This is mission critical even if you don't go digital. No matter what you do, you must get a backup system, it must have redundancy built-in and it is not optional. Losing all of your data can cripple your office. The risk is simply not worth it. Backing up take on an even higher importance when you start relying more on your digital file. Here are some Backup Rules for you to follow.

1. Backup Rules for a Law Firm or Legal Department:

   a. No Excuses: You must be backing up all of your important data every day. Every day, no matter what.

   b. You Own This Issue: Never just assume that everything is being backed up. Someone in your office needs to be responsible for ensuring that it is happening every night and you need to be able to verify that it actually occurred without errors. Ask your IT/computer person how the backup system works (generally), how often it backs up data, and exactly what data is being backed up and how you can verify that everything is being backed up (there is often an easy log you can check).

   c. Unattended Is Best: The best backup methods do not require you to remember to do anything for the backup to occur. Unattended backups are the best for two important reasons. First, if someone has to remember to do it, they'll forget. Second, backups sometimes take a long time and they'll usually bog down your system when they're running. Therefore, they're best run at night when no one is using your network or their computers. This means that you cannot use backup media that is not large enough to backup all of your data. Therefore, CDs, DVDs, Zip disks and the like are eliminated because unless you have hardly any data, it's not going to fit on a single CD or Zip disk and that means you'll have to baby-sit the backup and feed it additional media when the first one is full.

   d. Backup Everything: DO NOT backup only the data you've created (i.e., Word or WordPerfect files, etc.). You want to back up the entire drive of the computer you're backing up. Although you may not want to restore a screwed up computer right back to the way it was before a crash, there are lots of things you'll need which aren't in the standard data folders (internet favorites, Outlook's database of email, contracts, calendar, drivers, some data, etc.).
e. **You MUST Check the Backup Log Every Day:** Most backup devices don't tell you if they worked properly or not. The only way to make certain is to look at the "backup log" which the tape backup software maintains. Someone needs to do this every single day to make sure there were no malfunctions.

f. **Replace Tape Media At Least Annually:** If you're using a tape drive as a backup device, you need to write a "born-on" date on the tape and replace them at their 1 year birthday. Tapes lose their ability to hold data over time and you don't want to take the risk that your successful backup is not restorable due to bad media.

g. **Never Rely Exclusively on Internet or Cloud Backups:** Many offices are using online backup options like Mozy Pro (www.mozy.com) or Carbonite (www.carbonite.com). However, these should be secondary backups and definitely not your only backup. The problem is that even if you have a fast Internet connection, it can easily take days to get all of your data back in the event of a crash.

h. **Off-Site Storage:** If you're using tapes, take yesterday's backup home with you every night. If you're using an external hard drive, burn your important data to CD periodically and put it somewhere off-site. You can also use one of several Internet based backup options.

i. **No Incremental Backups:** An incremental backup means you're only backing up files that have changed since the last full or incremental backup. You can get quite a chain of these going and hopefully there's a full back up at the beginning of the chain. People have used this method because it's faster and takes less space. Incremental backups are NEVER, EVER acceptable. First, trying to restore something when the data is scattered across many incremental backups is a nightmare and takes a very long time. Second, if one of those incremental backups gets screwed up, it may eliminate the possibility that you can restore anything that was backed up subsequently. Third, pure incremental backups create only ONE copy of each file. If a file changes, the backed up copy of it is over-written. There are many circumstances under which you might need a prior version of a file (such as a corrupted database). You want to do a full backup of everything, every night. Ideally, you would have at least 5 full, rolling copies of everything. No increments!

j. **Run Test Restores At Least Once A Month:** You need to do this to verify that you can restore and also to make sure you know how to do it.
k. **Have a Secondary Backup Method:** Have at least two backup methods. For example, if you've got a tape backup, then add an external hard drive or an on-line backup or burn CDs. You can never have too many copies of your stuff.

2. **AntiVirus Software:** You absolutely must have a good antivirus software program running on your server and all connected computers. The virus definitions must be updated at least weekly and preferably, the updating should be automatic.

3. **Firewall:** A firewall is a specially programmed computer system that "stands" between an organization's internal network and the Internet. It is a security measure used by many companies to prevent hackers and other unauthorized users from accessing internal networks. The firewall computer is set up to monitor traffic and to keep unauthorized individuals from tampering with the system, thereby protecting a private network from a public network. Firewalls are also set up to protect the security of servers. If you're connected to the Internet (as you should be), you need to have a hardware firewall, a software firewall or both. A detailed discussion of firewalls is beyond the scope of this seminar, but you can learn more at www.firewallguide.com/faq.htm.

C. **One Big Fast Scanner In the Copy Room v. Multiple Smaller Scanners:**

1. **High Speed Copier Which Also Scans:** There are two schools of thought regarding the best way to incorporate imaging into a law office. One method is to buy one really fast scanner, connect it to the network, put it in the copy-room and let everyone use it for scanning. Copier sales/leasing companies are pushing copiers that are also network scanners and printers. Having a copier that is also a printer makes a ton of sense; and I've frankly never understood why all copiers aren't also printers. Although high speed copiers that also scan are pretty nice and can be extremely fast, there are drawbacks.

   In our experience, offices with one, big, fast scanner (and no small desktop scanners) are much less likely to get everyone on board. The fact is, law offices are busy places and time-consuming processes are avoided, generally speaking. A copier/scanner requires that users get up out of their chairs, walk down the hall, stand at a copier, designate where they want the scanned documents to go on the network in advance, scan the documents in, then walk back to their offices and locate the images on the server. If someone is already copying or printing, then the whole annoying process gets delayed and maybe never done. Make someone jump through a lot of hoops to scan, and I guarantee you that the annoyance factor will quickly nullify any previous enthusiasm the individual may have had for scanning.

   Notwithstanding the foregoing, if you can add scanning capability to your copier and it fits within your budget and business plan, then by all means,
do it. In fact, it may be a good, inexpensive (relatively speaking) option to add to your copier and it's certainly handy for the big documents you need to scan.

2. **Small Desktop Scanners**: The alternative method is to put less expensive, slower scanners on the desks of everyone who will be scanning. If I can sit at my desk, drop a document in a scanner's document feeder on my credenza and direct exactly where the document is going to go with one click, I'll do it and so will most people. Therefore, we recommend desktop (or credenza) scanners within arm's reach for everyone who will be scanning. This is not to say that a big, fast scanner doesn't have a place in your office. Of course, you can also use desktop scanners in addition to a large copier/scanner.

3. **Comparison of Typical Copier to Desktop Scanners**:
   a. **Xerox WorkCentre 5638**:
      i. Print 32 ppm/Scan 38 ppm
      ii. Print/copy/scan
      iii. Typical lease from Xerox for 60 months (no copies included) - $537.90/month for 60 months or **$32,274**
   b. **Fujitsu ScanScap S1500**:
      i. Scans 20/40 ppm (no print or copy)
      ii. **$415**
      iii. You could buy 77 of these scanners for the price of one Xerox.

4. **Comparison of Leased Copier to Separate Components**: In other words, a Xerox copier can print, copy and scan. If you purchased separate machines to handle each of those functions, what would it cost? Keep in mind that if you scan and print, then you probably don't need a copier because anything scanned can be printed over and over.
   a. **Copier**: Lease payments total for 60 months.
      - **Xerox WorkCentre 5638 (38 ppm)**: ................. **$32,274**
   b. **Separate Components**:
      - **Fujitsu 6140z** - (scans 60/120 ppm).......................... **$1,449**
• HP LaserJet M602x (prints 62 ppm/duplex/network adapter) ........................................... $2,315

• Stapler/Stacker/Collator for Printer (HP part CE405A) ......................................................... $249

• Toner (enough to print 120,000 pages) .............................................................. $1,345

• Unbundled total price: ......................................................................................... $5,358

5. **Comparison of Purchased Copier to Five Person Scanning System:** Below, compare what a copier would cost if purchased outright against 5 scanners and a printer.

   a. **Copier:**

   • Xerox WorkCentre 5150 Copier (50 ppm with a few options): ....................... $12,000

   b. **Separate Components:**

   • Fujitsu 6140 – (scans 60/120 ppm) ............................................................... $1,449

   • Fujitsu ScanSnap S1500 - 4 of them (scan 20/40 ppm) ...................................................... $1,660

   • HP LaserJet M602x (prints 62 ppm/duplex/network adapter) ................................ $2,315

   • Stapler/Stacker/Collator for Printer (HP part CE405A) .......................................................... $249

   • Toner (enough to print 120,000 pages) ....................................................... $1,345

   • Unbundled total price: ......................................................................................... $7,018

D. **Key Features for Small Desktop Scanners:**

1. Consider a flatbed if you scan odd-sized or bound items (books or magazines), otherwise a sheet-fed scanner is the best option;

2. It must have an automatic document feeder which holds 25 pages or more;

3. It must be fairly quiet (users should be able to conduct phone conversations without yelling over the scanner);

4. We recommend that a scanner be TWAIN compliant unless it comes with all of the software you need like a Fujitsu ScanSnap S1500 scanner;
5. We recommend a USB 2.0 connection to your computer;
6. It must be able to scan black & white, gray-scale & color;
7. It must be able to scan legal and letter sized documents; and
8. It must be fairly fast (recommend 15 – 35 pages per minute).

E. Recommended Scanners for a Law Office: If the scanner you’re considering has the right driver to work with your PDF software or if the scanner comes with the software necessary to create PDFs, then you’re probably fine. However, here are a few scanners we particularly like.

1. Basic Scanners Types:
   a. Flatbed Scanners: A flatbed scanner consists of a flat surface on which you lay documents to be scanned. They’re very similar to a copier in appearance and they’re particularly effective for bound documents. You can buy flatbed scanners with or without an automatic document feeder ("ADF"). However, buying one without an ADF is a complete waste of money as it will take an inordinately long time to scan any multi-page document. No one will like it and no one will use it. A flatbed scanner with an ADF will allow you to scan regular cut sheets of paper or bound materials. However, they’re generally slower and more expensive than their sheet-fed counterparts (see below).

   b. Sheet-Fed Scanners: Sheet-fed scanners lack the flat glass surface for scanning bound materials; and they only have an automatic document feeder. However, sheet-fed scanners are generally faster and less expensive than flatbed scanners. Of course, if the only type of scanner you have is a sheet-fed scanner and you need to scan bound materials, you could always copy the appropriate pages and then scan them.

2. Recommended Flatbed Scanners:
   a. Xerox DocuMate 3220: Scans 23 ppm, has a 50 sheet ADF and will scan color, b&w, and gray scale. $308 from www.amazon.com - Mnfg. Part #XDM32205M-WU. Part number is the same in Canada, but the price is $510 from www.amazon.ca.

   b. Fujitsu fi-6230z Scanner: Scans b&w one-sided (simplex) at 40 pages per minute or double-sided (duplex) at 80 pages per minute. Also capable of color scanning; and handles letter or legal sized paper. This scanner connects to your computer via USB 2.0. This scanner is small and quiet, handles color, black &
white and grayscale. Best of all, it has a 100 sheet automatic
document feeder (ADF). Comes with Kofax® VRS® Professional,
Adobe® Acrobat® Standard, and ScandAll Pro. Part number

c. **Fujitsu fi-6240z Scanner**: Scans b&w one-sided (simplex) at 60
pages per minute or double-sided (duplex) at 120 pages per
minute. Also capable of color scanning; and handles letter or
legal sized paper. This scanner connects to your computer via
USB 2.0. This scanner is small and quiet, handles color, black &
white and grayscale. Best of all, it has a 100 sheet automatic
document feeder (ADF). Comes with Kofax® VRS® Professional,
Adobe® Acrobat® Standard, and ScandAll Pro. Part number
PA03630-B505, $1,908 from www.costcentral.com. Canadian part

3. **Recommended Sheet-Fed Scanners**:

a. **Fujitsu ScanSnap S1500 Sheet-Fed Scanner**: Sheet-fed,
scans 20 ppm simplex, 40 ppm duplex, no TWAIN driver, but
comes with Adobe Acrobat 9 Standard and works fine with it. The
US mfg. part number is PA03586-B005 and it costs $415 from
www.amazon.com. In Canada, the part number is PA03586-B002
and the cost is $492 from www.amazon.ca. This is one of the
best scanners I’ve ever used. The Mac compatible version is
called the S1500M.

b. **Fujitsu fi-6130Z Sheet-Fed Scanner**: Up to 40 ppm/80 ppm
duplex black and white or grayscale. 50-page Automatic
Document Feeder (ADF) with enhanced hard and embossed card
scanning (Example: credit or healthcare cards); comes with
Kofax® VRS® Professional, Adobe® Acrobat® 8 Standard, and
ScandAll Pro. The US part number is PA03540-B055, and it's $829
from www.newegg.com. The Canadian part number is PA03630-
B052 and it's $1,147 from www.amazon.ca.

c. **Fujitsu fi-6140Z Sheet-Fed Scanner**: Up to 60 ppm/120 ppm
duplex black and white or grayscale. Best in class 300 dpi color
scanning at 40 ppm/80 ipm; 50-page Automatic Document Feeder
(ADF) with enhanced hard and embossed card scanning
(Example: credit or healthcare cards); comes with Kofax® VRS®
Professional, Adobe® Acrobat® 8 Standard, and ScandAll Pro.
Canadian part number is PA03630-B002 and it costs $1,850.62 on
www.amazon.ca.
d. **Fujitsu fi-6670 Sheet-Fed Scanner**: Up to 90 ppm/180 ipm in color or monochrome, landscape. Ultrasonic double-feed detection with advanced control. Loaded with "intelligent" functions for more efficient scanning. Advanced image processing in hardware with color graphics adapter (CGA). Valuable bundled software tools and applications including Kofax® VRS 4.2 Professional. Service options to fit specific requirements and budget including Next Business Day, 4-hour or 24/7 contracts available. US part #PA03576-B505, $4,149 from www.provantage.com. Canadian part #PA03576-B532, $6,842 from www.amazon.ca.

F. **Software That Creates Searchable PDFs**: In order to make scanned images searchable by the words contained therein, you need to scan those documents as special PDF files called "Searchable PDFs" or "Image Plus Text PDFs." This is similar to a regular PDF (image of the original document), but there's an invisible layer behind the image containing text and numbers. As such, you can search for text contained in the invisible layer and it will locate and highlight the text you've searched. There are multiples ways of creating Searchable PDFs.

1. **Adobe Acrobat XI Pro**: Mnfg. part # 65195200 - $433 at www.amazon.com

2. **Adobe Acrobat XI Standard**: Mnfg. part # 65196809 - $299 at www.buy.com

3. **Adobe Acrobat X Pro**: Mnfg. part #65083161 - $332 at www.buy.com

4. **Adobe Acrobat X Standard**: Mnfg. part #65085821 - $290 at www.buy.com


Having tried all of the foregoing, I would recommend Adobe Acrobat.
G. **Acquire Search Program or Document Management System:** Even if you've created a good file naming convention, you'll still need help finding some documents. Now that you've created searchable PDFs, you can search through all of them at once, quickly, by searching for particular words. Here is a survey of your options:

1. **Windows Options:** Even if you've created a good file naming convention, you'll still need help finding some documents. Now that you've created searchable PDFs, you can search through all of them at once, quickly, by searching for particular words. Here is a survey of your options:

   a. **Copernic Desktop Search:** RECOMMENDED - See www.copernic.com. There are three versions of Copernic, Home (FREE), Professional ($49.95) and Corporate ($59.95). Unless you're installing it in a very large firm, you only need the Professional version. You can try the free home version, but one of the limitations of the free version is that it does not search network drives. So unless you're keeping all of your files on the C: of the computer you're using (I certainly hope you're not doing this), the Home version will not help you very much. Copernic will search all of your files (Word, Excel, PowerPoint, PDF, HTML, WordPerfect, text and another 150 types of files). It will also search Outlook or Outlook Express email and any attachments to email.

   b. **dtSearch:** RECOMMENDED: See www.dtSearch.com - $199 - one of the most sophisticated and fast search engines I've ever seen. It provides the most search options and file types that it can recognize. If you need industrial strength search capability involving enormous numbers of documents, this is your program.

   c. **Filehand:** See www.filehand.com - FREE. Instantly search for files on your computer, by content. See the extracts of the files you found, even for PDF files. Scroll through the extracts so you can quickly find the information you're looking for. Find the file you are looking for, even when many files match, because Filehand Search sorts the results by relevance. Do complex Boolean searches and searches by phrase. Use it all the time because it is so simple to use!

   d. **MSN Search Toolbar with Windows Desktop Search:** This is in Windows XP only - see http://desktop.msn.com/ - FREE.

   e. **Instant Search** (Windows Vista and Windows 7): For more information on this, see http://tinyurl.com/6j584x. This is included with all versions of Vista.
2. **Apple/ Mac Search Program Options:**
   
a. **Spotlight Search (Mac OSX):** This is included with the Mac OSX operating system. For more information, see http://support.apple.com/kb/HT2531
   
b. **EasyFind:** Free - see http://tinyurl.com/d6se856
   
c. **HoudahSpot:** $15 - see www.houdah.com/houdahSpot
   
3. **What Search Programs Do:** Briefly, they read through all of the documents you've created in a word processor or scanned, and they build an index of the text contained therein. Once the index is built, you can search through all of those documents by either file-name OR the words contained inside them. When searching for words contained inside the documents, you can use the standard Boolean logic (and, or, not, etc.).

4. **Document Management System ("DMS") Options:** As described in paragraph II.C.9. above, a DMS is a hardware/software system that automates the process of storing, classifying, searching, sharing, and retrieving electronic documents. A DMS also provides an organization with the tools to create, manage, control, and distribute electronic documents. The main players are:
   
a. **Worldox GX:** WORLDOX's unique SQL-free software is installed in more than 2300 companies worldwide, 2000+ of which are law firms and legal departments. It is a “SQL-free” document management system. For the law firm, the total cost of ownership, especially over the long haul, is considerably less. For more information, go to www.worldox.com.
   
b. **iManage WorkSite:** Autonomy WorkSite™ is a SQL based integrated application suite that combines document management, collaboration, portal access, knowledge management, workflow and business process automation in a single solution on a highly scalable and secure Internet platform. From an end-user's perspective (ease of use), this is, by far, the best program available on the market today. Its integration with Microsoft Outlook is fantastic. See http://www.interwoven.com. Interwoven does not disclose pricing information on their web site.
   
c. **NetDocuments:** NetDocuments provides a document management via the web, so you store your documents on their server and basically pay a monthly fee for the utility of the software. Since you pay by the user, this solution can work for a single lawyer up to thousands of users. For more information, go to www.netdocuments.com.
5. **Functionality of a DMS**: The foregoing document management systems offer most, if not all, of the following:

a. **Ability To Save and Manage Any Type of Document**: The DMS should be able to hold any type of file you've created in-house as well as any type of scanned document (PDF, TIF or JPG) which will typically represent the documents you're received from the outside. A search will turn up all relevant documents regardless of physical location, format, and source application. For example, I have seen plenty of copier-based applications which only hold documents you scan. It does little good to have scanned documents in one system and all of the documents you've created in-house in another system. The idea is to get everything related to a matter in the same system, including documents you've created in-house, documents you've scanned, faxes, hand-written notes, email and attachments to email.

b. **Forced User Compliance**: The system must require user compliance. In other words, if a user wants to save a file from within any program you use (Word, Acrobat, Excel, etc.), it must be saved into the DMS (or it cannot be saved at all). The DMS can be configured so there is no back-door or way to circumvent the system. This will absolve anyone in your office from having to police usage of the system and it will ensure the success of the project. For example, when I try to save a file in Word, I get this (see next page):
c. **Email Integration**: This is extremely important. With a DMS, all emails related to a particular matter can be easily saved along with the other matter related documents. Important features include:

- Ability to save emails from within Outlook without "exporting" them or saving them somewhere else before they're moved into the DMS.
- Ability to save the email and any attachments into the DMS.
- Two click saving: People will be doing this constantly, every day. The process can't be time consuming, tedious or have too many steps.

d. **Integration With Other Programs You Already Use**: In order to be convenient to use and force user compliance, the DMS must integrate with Word, Acrobat, Excel and any other program in which you save documents or files. When someone clicks the Save button in Word, the DMS must intercede and ask the user to "profile" the document.
e. **Integration With Any Case Management Program You Are Considering:** If you are considering a case management system, then you would like your DMS to integrate with it. For example, Worldox integrates with Time Matters, Amicus Attorney and Practice Master (top 3 case management programs).

f. **Metadata Searches:** In the realm of document management, metadata is the additional information stored about the document (other than the file name). For example, when I search for a document, I get the following screen:

![Metadata Search Screenshot](image)

Metadata includes the information you can see above like Profile Group, Client ID, Matter ID, DocType, Author, Description, Comments, etc. All of these things can be search criteria.

This search capability can help ensure continuity and a smooth transition when someone leaves or joins your office. For example, if someone unexpectedly (and suddenly) left the your office, it would be pretty difficult to determine exactly what they were working on before they left. However, if a document management system were in use, it would be quite easy to find...
every single document or email that person touched in the last 90 days (for example). It's one thing to have a log or list of documents they were working on; it's quite another to actually be able to find those documents. Furthermore, the searches can be narrowed down considerably. For example, I could easily find every pleading (document type), containing the phrase "motion for summary judgment" (text in file), created by a particular employee (author), between 11/1/2008 and 11/1/2009 (date created range), for any matter having to do with ABC, Inc. (client name). I imagine that it is presently impossible for anyone in your office to even contemplate a search like that.

g. **Full Text Searches:** Full text searching gives users wide-open access to their documents by framing searches based on concepts rather than categories. Users can search by many criteria - words, combinations of words, phrases, words within proximity of each other, expressions, etc. Each document matching the search terms is returned as a "hit" and the integrated file viewer will highlight each occurrence of a search term in the returned documents. This is exactly like doing a Lexis-type search through your own documents. When evaluating DMSs, you want the ability to view the documents in a viewer without actually opening them, you want to be able to use Boolean logic terms (and, or, not, near, etc.), and you want the search terms highlighted in the document the system found.

h. **Date Range Searches:** Although it isn't a field that users fill out when they save a document (date created), it's important that users be able to search on date created or date last accessed.

i. **Fast Searches:** People will be running searches every day, all day so the process needs to be fast. This might not seem like a major point, but if you have to wait on a system to catch up every time you use it to look for something, you'll want to stop using it.

j. **Security:** Document security places the DMS at the focal point of access and permission to the document repository. Document security involves documents, users, and groups of users. The DMS must give the saver of the document the ability to assign rights and permissions to documents based on individual users, groups of users, and the roles in which users serve within the organization. For example, documents saved in the administrative profile group would likely not be available to all users. Those documents can be secured by user, user group or by role. You would also have the ability to secure an individual document that otherwise would be available to everyone.
k. **Check-In/Check Out Capability**: The DMS must handle documents the same way a library handles books. When you "check out" a document, the system locks it and won't let someone else have the original. Instead, the DMS will notify the second person that you have the document checked out (if they try to open it) and that they can have a read-only copy of it. Of course, once you check the document back in, then it is available for someone else to check out. This prevents accidental over-writes of documents when multiple people are working on it at the same time.

l. **Version Tracking and Audit Trail**: The DMS can keep multiple versions of every document. This becomes very important when a document is undergoing revision and is being passed back and forth between attorneys. Most DMSs will keep 256 or more versions of every document along with a detailed audit trail noting who did what to the file and when.

m. **Ability to Compare Documents**: Related to version tracking, users must also have the ability to compare different versions of a document or compare one document to another. In order to compare documents, some people use the compare features built into MS Word while others use 3rd party applications like CompareDocs or Workshare Professional (fka DeltaView). Since all of the documents being compared to one another will be stored in the DMS, the DMS must integrate with these functions in Word or 3rd party programs. Not all DMSs incorporate this functionality which is why this is an important question to ask up front.

n. **Archiving Old Files**: Archiving is a means to move dated or unused files off the main storage medium to secondary storage. The DMS ensures that users can still search for information in the archived files and that there is a ready means to restore it. Many DMSs will allow site administrators to set "triggers" in the document profiles that enable automated archiving. For example, it may be desirable to set internal memos to be archived automatically after say, 24 months.

o. **Remote Access/Offline Access**: The DMS must be accessible offline (on a laptop when you're not connected to the office network) and via the Internet.

p. **Scanning Integration**: Scanned documents must be easily added to the DMS so that they are included in the document store and can be associated with matters, clients, and the like.
q. **Consistency**: The system must ensure that documents are consistently labeled and stored.

r. **Don’t get a DMS Without Training**: The DMS will likely be the most used program in the office. Therefore, it is critical that everyone knows how to use it for saving scanned documents, email, attachments and word processor documents; how to search; and how to use it for workflow management (like tracking the status of a contract). Therefore, it is imperative that you get hands-on, on-site training on how to use the system.

s. **Intelligent Method of Bringing Existing Documents Into the System**: Your office has probably built up a pretty large store of documents that need to be accessible within a new DMS. Bulk importing all of your existing documents without any matter association or metadata is not exactly an intelligent way of doing this. I would equate that approach to starting a new paper filing system by pulling all of the paper out of your old files and throwing them on the floor in the middle of a new file room (to be sorted out later). Ideally, your existing documents could stay where they are, but still be searchable within the new system. Once an old document is opened and re-saved, then the DMS should intervene and move it into the new system.

H. **If No DMS, Consolidate Folder Structure**: It is critical that documents are saved by client/seminar/issue, not by user. Saving documents by user can create lots of problems, such as:

- Docs for one matter in more than one folder
- Revision conflicts
- Losing things permanently if staff turns over

Saving documents on users’ C:\ drives is a big no-no. Saving documents by client or matter in one central location is a better option. You can create a logical directory layout, find documents easier, it makes backing up your documents simpler, and you can use Windows security to limit access for users. Two main options for file structure:

I. **If No DMS, Establish File Naming Conventions**:

1. **The Old Way**: File naming has become more intuitive since Windows 3.1 (we used to be limited to 8 characters). Document extensions used to identify the type of document (.ltr, .fax, .dep, .pld, .cor, etc.)

2. **The New Way**: You now have 255 characters to name a file or folder in Windows. Therefore:
3. **Acceptable Characters**: A file name may contain any of the following characters: A-Z 0-9 ! @ # $ & ( ) - _ ' { } ^ ,

4. **Unacceptable Characters**: A file name may not contain any of the following characters: * + = [ ] : " ~ < > ? / \ %

5. **Recommended Protocol**: In house, we like everything sorted by date so we precede every file name with a date, year first. If you enter the date month/day/year, then all of the January files (for all years) are lumped together, all of the February files are together, etc. Our file naming convention:

   - 2004-10-30 - Letter to Bill Biviano re billing system.doc

   The date indicates the date the document was mailed out if it's a letter, and the longer description makes it clear what this document contains without even opening it.

J. **Conduct Training for All Staff**: This is the most important aspect of the entire project. Ideally, you'll have someone conduct the training for you at your office using your new equipment. Even people who don't think they'll be scanning or who have said they don't want to should be included in the training. The reality is that once resistant individuals see how easy and constructive it is to scan, many of them will change their minds. Seeing it work first hand is pretty inspiring.

K. **Digitize Incoming Documents**: Some law offices scan all incoming mail which is then forwarded via inter-office email to the recipient (except for obvious things like magazines, etc.). The recipient can then view the mail, save it into the appropriate electronic file, or discard it. The person who scans the mail into the computer system retains the originals for one week and if they're not requested by the recipient, they are shredded. In the alternative, let everyone scan in their own mail and that way time won't be wasted scanning things that would have been thrown away anyway. If everyone has a desktop scanner, this is easy.

L. **Store Email Electronically**:

   1. **Saving Email As A Document**: The classic problem that law firms have if they do not own a document management system is saving and finding matter-specific email. Why? Because people (1) keep them in their individual inboxes, or (2) save them in subfolders within their own inbox (which no one else has access to), or (3) delete the email altogether. Email is valuable correspondence that in most circumstances should be
saved. However, it should not be saved within one's own individual inbox.

You can save email much like you save a Microsoft Word document clicking the File menu ➔ Save As (Outlook 2003 & 2010) OR Office Button ➔ Save As (Outlook 2007). We recommend that you save as **Outlook Message Format - Unicode (*.msg)**. If you’re using Outlook 2003, it will default to HTML but you can switch to MSG. If you’re using Outlook 2007 or 2010, it will default to MSG.

You may notice that you have a choice of Outlook Message Format and Outlook Message Format - Unicode. The Unicode format is the current standard for Outlook and holds support for international characters. The non-Unicode one saves msg-files in the ANSI format. The ANSI format is the only format that Outlook 2002 and previous can read. Outlook 2003 and later can read ANSI formatted and Unicode formatted msg-files. Dragging and dropping messages out of Outlook into an Explorer folder will by default save it in the Unicode format.

You can also save email as **Text Only** although you'll lose any formatting that was in the email. Saving as an MSG file will retain the original formatting, look and feel of the email.
2. **Saving Email By Dragging Into a Windows Explorer Folder:** You can clean out your inbox or subfolders under your inbox by cascading the windows and simply dragging and dropping all of them into the desired folder. This will COPY the emails over into that folder, saving them automatically as MSG (native Outlook Message Format) files, which preserves the metadata and all attachments.

![Dragging email into a folder](image)

M. **Write Down Your Scanning Protocols:** After the training, have meetings, experiment, and develop protocols which include what to scan and who will scan it. If you're using a DMS, determine how scanned documents will be saved and profiled into the system. If you're not using a DMS, determine folder organization and file naming conventions.

N. **Make Your Electronic File Mirror Your Paper File and Run Them Parallel To One Another:** The documents you've created in-house are probably already in your electronic file. We propose that you simply add everything else in your paper file to it as well. In other words, if you receive a fax, scan it into your electronic file and put the hard copy of the fax in your paper file (like you've always done). If you receive a document in the mail from opposing counsel, scan it into the electronic file and deposit the original in the paper file. If you aren't happy only retaining the original Word or WordPerfect files, then after the letters are printed and signed, scan copies of them before you put them in the envelope. You can continue at this stage for as long as you'd like. This way, the paper addicts in your office will be appeased, but you'll still reap a lot of the benefits of an electronic file. When you're ready, move to the next step.
O. **When Possible, Start Shredding The Items You Scan:** We're not talking about the elimination of the paper file. Instead, we're suggesting that you could store a lot of your paper in digital form only and there is no penalty. For example, if someone sends you a fax, do you need to retain the original fax? Since a paper fax is not evidence of anything other than the death of a tree and could be modified imperceptibly with a cheap scanner and software, it's unlikely that you need to keep it in paper form. Therefore, faxes are great candidates for scanning and shredding. If you ever need to print the fax, of course you can do so from the scanned image. By starting this policy, you'll see that your paper files start becoming a lot skinnier, easier to search and easier to manage. If you are paranoid about losing your paper file, then you can certainly keep stuffing it with everything that comes in or goes out; but I'd respectfully submit that you're missing out on an enormous benefit of going digital.

VI. **PROBLEMS SOLVED WITH A COMPLETE DIGITAL FILE:** Okay, let's take the foregoing list of problems and see how they're addressed:

A. **Electronic Files Are Always In The Same Place:** The scavenger hunt is over if your files are digital. Anyone in your firm can instantly find any electronic file. No searching, no walking around the office, no rummaging through file cabinets. Need to answer a simple question, the answer to which is in a letter you received from opposing counsel last month? If it was scanned, you know right where to go and you can find it in seconds.

B. **Managing Less Paper Means Lower Operating Costs:** Of course, you get this benefit only if you stop cramming every shred of paper that comes into your office in a paper file somewhere.

C. **Electronic Files Are Easily Searchable:** There are several third party programs you can buy which will search the content of your digital files. If you scan your documents as PDF Searchable Images (image with text), even they can be searched by content.
D. **Your Files Now Have a Table of Contents:** If you’re using a DMS, then you can easily see all documents related to a particular file. If you’re not using a DMS, you can still easily see a table of contents for your files by simply clicking File Open in Word:

![Image](image.png)

E. **Electronic Files Are Easily Sharable:** Unlike paper files, you and anyone else in your firm can be looking at the same file simultaneously. You can make copies of the entire electronic file in a few seconds and store them on a wide assortment of media.

F. **Electronic Files Are Easily Transportable:** If you’re out of the office and you need information from a paper file that is back at the office, you’re often out of luck. If the file were electronic, you could access it with a Virtual Private Network (VPN), Terminal Services, Citrix, a www.gotomypc.com account or even PCAnywhere. In other words, if you have standard remote connectivity, you could get that information from anywhere you had an internet connection. Moreover, you could take ALL of your files with you on a laptop.

G. **Since You Can Share an Electronic File, You CAN Collaborate:** If you need to collaborate with clients, experts, courts or co-counsel, you can give them instant access to your entire file. Items can be sent instantly via email or burned
to a CD that costs $0.25. If you needed to give your entire file to someone, you could simply hand them a CD. It’s a nice alternative to hauling banker’s boxes of documents to the local copy center, paying them a lot of money, killing a lot of trees, and then walking out with twice as many banker’s boxes, a hernia and a big shipping bill from UPS or FedEx.

H. **Accessing Digital Paper Is Instant**: Instant data access, instant answers.

I. **Updating Electronic Files Takes Virtually No Time At All**: Let’s say you get a piece of mail that needs to go into a particular file. Even with a “low-end” scanner, you can deposit 20 pages per minute into that digital file without first searching for the file. No file clerks necessary, no office scavenger hunt and no wasted time.

J. **Inexpensive Storage**: The number of electronic files I carry around on my laptop would fill a house if they were in paper form. I can find all of them immediately and I have no storage costs.

VII. **ADDITIONAL IDEAS**:

A. **Stop Injecting Paper Into Your Workflow**: This is something you need to start thinking about all the time. People habitually print things and make copies so it can be difficult to break the habit.

B. **Stop Making Copies of Everything You Send Out and Putting Them In The Paper File**: There are unquestionably a lot of paper documents in your files that you don't actually need in paper form if electronic copies of them are on your server.

C. **Stop Printing Email**: Stuffing your paper files with printed email accomplishes little, if anything, useful. It makes your files fatter and makes it even more difficult to locate the particular documents you’re looking for once you find the file. Email needs to be captured electronically and this can be accomplished electronically by any of the following methods:

   1. You can save the email itself as a .msg or .txt file in the electronic folder related to a matter. This is the preferred method if you don't have a DMS.

   2. Use Adobe Acrobat (or other PDF creator) to create PDFs of email and their attachments, then store those PDFs of email in the electronic folder related to the matter (or DMS).

   3. If you have a DMS, you can store the email in its native format inside the document management system.

D. **Buy Monitors That Rotate to Portrait**: Many lawyers print documents in order to review them because they find it difficult to review documents on a computer screen. This difficult typically arises out of the fact that when viewing
a document on a typical monitor, one can only see a few paragraphs of each page because the monitor is landscape (wide) and the document is portrait (tall). To remedy this problem, we recommend buying monitors that rotate to portrait (see screen shot below). Monitors with this capability usually only cost a few dollars more than those without it and it is completely worth the extra money. As you can see below, a standard 22” monitor rotated to portrait not only allows a user to see an entire page of text at once, but it makes it nearly twice as big as it would appear if you printed it on 8.5 x 11” paper.

E. **Buy Dual Monitors:** This concept simply allows you to spread out and not spend so much time minimizing and maximizing applications you’re working with in order to switch between them. The reason you’d want to go with two monitors rather than one larger one is that it is far less expensive to do so. For example, two 23” monitors can easily cost $400 for both ($200 each); however, a 30” monitor can easily cost $1,500 for one of them. New desktop computers can be configured to include two monitor ports for this purpose. Many laptops also come with two monitor ports on the docking stations (Dell Latitude laptops, for example). If you have an existing desktop computer, you can buy upgraded video adapters which provide dual video output ports. Finally, you can buy USB to VGA adapters which are designed to allow you to add additional monitors via the USB port on your computer.
F. **Scan Non Client Related Items First**: For example, you probably have a lot accounting records stuffing filing cabinets (bills paid, bank statements, etc.) that would be excellent candidates for scanning. Try those first as they are great candidates.

G. **Consider a Press Release or Marketing Materials About What You've Done**: By reducing paper, you're reducing your firm's carbon footprint, reducing landfill waste, helping the environment and saving money. This is something to crow about. Many firms incorporate these facts into marketing materials, their web site, etc.

**Questions? Contact me!**
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