

Choosing to invest in a paperless solution involves assessing more than a system's dollar cost. Other prized outcomes – efficiency, improved access, and user confidence are key measures of success. Achieving these benefits is the ultimate measure of the value that going paperless can bring to your litigation practice.

The Rewards of Scanning

Going paperless offers many benefits for litigators beyond convenient access to scanned files. Having key information right at your fingertips means you are always on top of your cases.

A dedicated paperless system like Primafact can provide tremendous trial preparation benefits including

- Complete file mobility
- Deeper Case Knowledge
- Better client service
- User-friendly trial binder presentation
- Built-in OCR (converts scanned text to computer searchable-text)
- Global full-text search
- Work delegation tools including user inboxes
- Non-destructive markups for structured, shareable case analysis
- Easy integration existing electronic documents
- Easy document sharing

Doing Paperless Better

Many firms recognize the value of going paperless, but are unsure of how much added value dedicated paperless office software can bring to their practice.

Attempting to go paperless using only off-the-shelf tools like Windows Explorer and Adobe Acrobat does get scanned documents onto the network, but it's a very cumbersome approach, and discounts the value of staff time spent on both scanning and retrieval. Input is slower and more labour-intensive; retrieval requires navigating through Windows directories to find documents (sorted alphabetically or by date) or waiting for Windows' often leisurely search results when you need to find text within a document. A robust system like Primafact can make that staff time more productive by offering a more efficient system and user interface.

Getting Started

Starting on the right foot can go a long way toward establishing a paperless system that maximizes your team's performance.

Whether you're taking the DIY route or using dedicated paperless software, it's important to have an implementation plan in place. Among other benefits, a concrete plan produces a reliable paperless record, which is essential if the goal is eliminating dependence on paper files.

Decide on the scope of what you want to scan – substantive documents only (such as pleadings and client records like employment records and medical reports) or all incoming documents including correspondence or somewhere in-between. Deciding what's important to your practice helps ensure your scanning investment pays off.

Getting the Right People Involved

At least one partner-level decision maker should be involved in developing the plan to ensure your goals are met and enforce ongoing commitment to the project. Including someone, perhaps a paralegal, with day-to-day knowledge of the files and firm practices can also ensure scanning practices are realistic and sustainable. Your solution provider should be able to provide workflow blueprints based on successful implementations at firms similar to yours.

The Golden Rule – Scan Before Sharing

However you choose to scan, remember the Golden Rule of reliable record assembly – distribute nothing before it is scanned. Making scanning Step One of your mailroom protocol ensures you have a complete record.

“Going Live”

Many paperless proponents recommend simply jumping in by scanning all new “in-scope” documents beginning on a set “go-live” date. However, if you're using paperless office software, you'll want to get the most out of your system from the outset. In addition to the “go-live” approach, we

recommend selecting a set of “active files” (files with an upcoming milestone, like depositions, trial or a settlement hearing) that you’re already actively reviewing, so you can take advantage of features like annotation, file sharing, mobile access, and of course, speedy full-text searching to boost case preparation right away.

Distributed vs. Centralized Scanning

Centralized scanning means that all scanning is immediately handled by a dedicated scanning operator or department, using a high-volume scanner. Distributed scanning means that each team member or group will do its own scanning. Each model has its advantages and disadvantages.

While the distributed approach may be preferable for some firms, we see better results when firms follow the *Golden Rule* – scheduling centralized scanning soon as documents arrive. When document scanning is always the priority for assigned staff, the record is more reliable since incoming documents are more likely to go missing when scanning is delayed.

Quality control for centralized scanning is also better as dedicated staff tends to be more consistent and methodical.

While centralized in-house scanning can introduce the expense of a scanning clerk, the cost is offset by improved productivity of higher-paid paralegals and clerical staff, who can focus on higher-value tasks. Scanner staff time might also be charged back as a disbursement as part of the per-page cost of assembling the paperless file.

Working your Paperless File

Once you have a good set of documents in the system, it’s time to enjoy the dividends of your scanning efforts – electronic access to your scanned files. Here’s where you realize the benefits of a dedicated paperless office system.

Unlike navigating the fixed file structure of Windows, Primafact lets you navigate files in a natural way – with

documents organized as you would expect to see them in your trial binder (not just sorted alphabetically or grouped by ‘date modified’ or file type). Even Document Management software misses the mark, with files presented in “matrix-style” lists, and search results requiring manual effort to identify desired documents. This means that Primafact can be used by everyone in the firm – not requiring lawyers to rely on a clerk or other assistant who has the training to locate needed documents.

Powerful searching is another great feature offered by Primafact. Built-in OCRing ensures that text documents are fully searchable, so your entire database can be searched instantly – far faster than a Windows search. Seeing matches highlighted in context right on the page can be invaluable in high-pressure situations, like confirming facts at a deposition.

Portability options like full-file synchronization and mobile device access make it easy for litigators to have everything they need when out of the office for days a stretch.

Easy Adoption with JumpStart

Since the success of a paperless system ultimately hinges on reliability of the record, establishing simple, reliable protocols should be a priority right from the beginning. Primafact’s JumpStart program has been designed with the needs of litigators in mind, so your whole team can get the most out of Primafact, without disrupting your practice. Our firm-tested “best practices”, file organization and workflow blueprints allow firms to easily configure Primafact to suit their practice needs. Training and support tailored to diverse staff roles helps to ensure that the entire team gets the maximum benefit from your firm’s paperless investment.

Investing in a well-designed paperless system that’s right for your firm can add tremendous value, making your paperless office a practice asset that can provide a winning advantage to firms that do it right.



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