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Brief Bytes

Organizing the Workplace with Technology

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Brief Bytes: Organizing the Workplace with Technology

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Technology can be a gift and a curse. There are days I am professing my love for Bill Gates, while others I am thankful there are no windows in my office. My computer could *accidentally* fall out one day. I know you all know that feeling!

Law firms and technology is a hot market right now. I believe we are in this transition period between pen, paper, and red wells to desktops, scanners, and a superb document management system. We have seen law firms go from hand written letters, typewriters and IBM processors to iPads, laptops, and email. The North Carolina State Bar appears to agree with this considering its recent implementation of the technology training CLE.

My firm is small, around 13 people. We range from me (mid-30s) to mid-60s. I have co-workers that use technology for everything, and want it to do everything for them, but I also have co-workers that fight technology use more than a toddler at bedtime. Moms and Dads, you know the struggle!

I'm lucky that I work for attorneys that appreciate and embrace technology. This not only makes my job a million times easier, but clients benefit from the efficiency with a quicker turnaround time and less billable hours. This frees me to work on another billable matter and have less admin time. Everyone is happy, making technology a win-win for everyone involved.

The burning question is "how do we get there?". I am still learning, working through books, programs, software, and CLEs to find what works best. But what I hope to do today is hit the overall concept on how to utilize technology to streamline your workflow and organize your daily work life.

I. Going Paperless 101.

a. The Essentials.

I cannot stress this enough. Going paperless is the key to any good file management. I know, it seems impossible, but hear me out. I was you. I thought I could not be more organized. Everything nicely organized, manila folders for days, all paper in date order, held in the folder with brackets so my attorney would lose nothing. (What? No!? An attorney loses something, that doesn't even seem like real life.)

But we all know the reality. We get busy, our filing box piles up, and before we know it, we are scaling Mount Correspondensville, which is now about 2 feet high, looking for the letter your attorney wants right this second. We holler "*I'm right on top of that, Rose!*" Deep down we are not right on top, but we can never let them see us sweat. So, we curse and pull our hair, question why we are working in this profession, and then we find the elusive white cat in the snowstorm, march it into our boss and they never know we are on the verge of a breakdown.

Besides this, email has become the primary communication method between law firms and clients. It is a rarity I speak with clients on the phone after the initial call looking for representation. Prior to becoming paperless you managed emails in one of two ways. You printed every single email, which when there is an ongoing chain can quickly become excessive, or you keep them in your Outlook account, and no one can see them but you. Not beneficial when your attorney *forgets* to mention emails.

These, and so many other reasons, are exactly why we must throw out every single red well and manila folder you own and go paperless. To do that the first thing you need is to have your attorney invest in a few essentials. Obviously, a desktop capable of handling your workload is important. My favorite essential, however, is a desktop scanner. Yes, we all have the giant Ricoh copier/scanner. These are convenient for large jobs and are placed in a central location. But your personal scanner will make the transition to paperless life seamless.

Most desktop scanners range from $150 to $500. I use the Fujitsu ScanSnap. While it was pricier initially, I have used mine for over 6 years now. It has paid for itself with the time used and the time it has saved during my work day.

Once you have your scanner, I also suggest getting two monitors. It makes working much easier when you can look at one monitor and work on the other. A heavy-duty shredder, Adobe Pro/DC, the current version of Microsoft Office Suite, and meeting with an IT person to discuss data storage (on-premise server versus a cloud server) should start you on your way to paperless, the rest is up to you.

Design a system that works for you. This system includes how you work and the programs you use to work. For example, when my mail comes in each morning the first thing I do is open it, scan it, and save it the file. I then task any deadline associated with the document and give the original to the attorney if they must see it. Once you have your system, be flexible to change your change. It is a work in progress.

Change is difficult. Believe me, I understand, no one likes having to change things they have done for a decade or longer. But, I promise, once you get accustomed to it you will question how you ever worked before being paperless.

b. Document Management System.

In a paperless world I cannot stress enough how important it is for the firm to have a great document management system. Just because you are paperless does not mean you cannot just as easily become unorganized; which, defeats the purpose of being paperless.

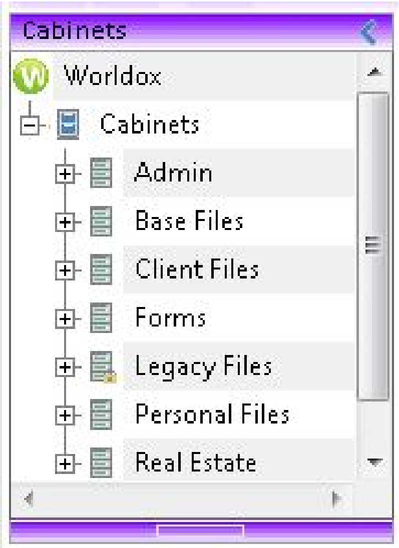
Prior to having a document management system my firm used a shared drive. This allowed everyone the ability to access files. While this was a step-up from red wells and shelves, it was still in disarray. Most were still maintaining paper files with the only items in the shared drive the draft documents. Let's talk about those drafts! Sometimes we would have fifteen .DOCX files, all named the same, with v.1, v.2, etc., at the end. When you have been working a case for 2 years you can imagine how cumbersome this quickly became.

As more firms went paperless the shared drive became this hodge podge of .DOC(x), .PDF, .XLSX, files. In addition, half a file was in electronic format and half the file still paper. Even if you tried to go paperless, like me, you most likely had 50 folders in your shared drive with hundreds of files in each folder. The naming convention was never the same in a file. Some people would scan the document and leave it named the way it scanned (i.e. 17895789074.PDF). While others would name the document there was a limitation on the number of characters you could use. This meant there was no uniformity and file names were abbreviated however it made sense to the person saving it.

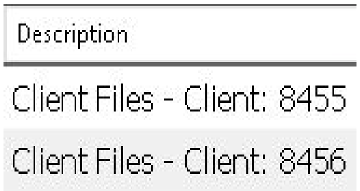
The most important and overlooked part was there were no ways to search the files once saved. Looking back, it may have been easier to stay using paper. You could go into the folder and type a name in the search bar. The problem? It didn't search the file itself, and with naming conventions not uniform, it was pointless. We had this program, Copernic, that would search your PC. But unless you OCR'd a document it didn't work, and let's be honest, more times than not the scanned/saved documents were not OCR'd rendering Copernic worthless. Then it happened. My firm purchased a document management product and I cannot believe that I ever worked without one. Paperless organization is finally possible.

We use Worldox, so most of what I say will be tailored to that. There are other products on the market, including: Tabs3; Rocket Matter; MyCase; NetDocuments; Clio; and Actionstep. I appreciate that cost benefit will always be what your attorneys ask about when presented with this idea, and that is important, but we now work in a field where it is becoming increasingly difficult to not have a document management system as courts, title companies, banks, and other firms are all going paperless. I would suggest having your attorney consult with someone about what works best for your firm. Affinity Consulting Group and Inertia Legal are two legal technology consulting firms we have worked with. In addition, my firm is working with Catherine Sanders Reach, Director of the Center for Practice Management with the North Carolina Bar Association, who my attorney states is the first person to listen to what he needs versus trying to upsell everything.

You can think of the document management system like a file cabinet. In Worldox this is exactly what you have, cabinets. We have cabinets such as: Admin, Client Files, Real Estate Files, Forms, and Personal Files.



Each cabinet then contains the "red wells". For example, the Client Files and the Real Estate Files "red wells" for each client. (Note: The client name is beside the number).

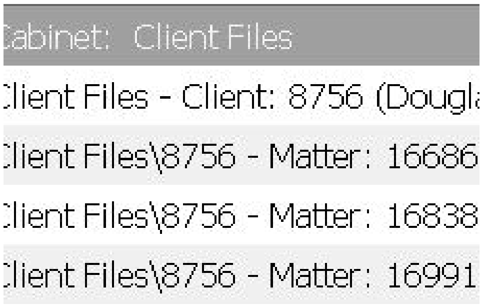


Description

Client Files - Client: 8455

Client Files - Client: 8456

Each Client File is then further broken down by matter, if they have multiple open matters with you firm.



abinet: Client Files

lient Files - Client: 8756 (Dougl

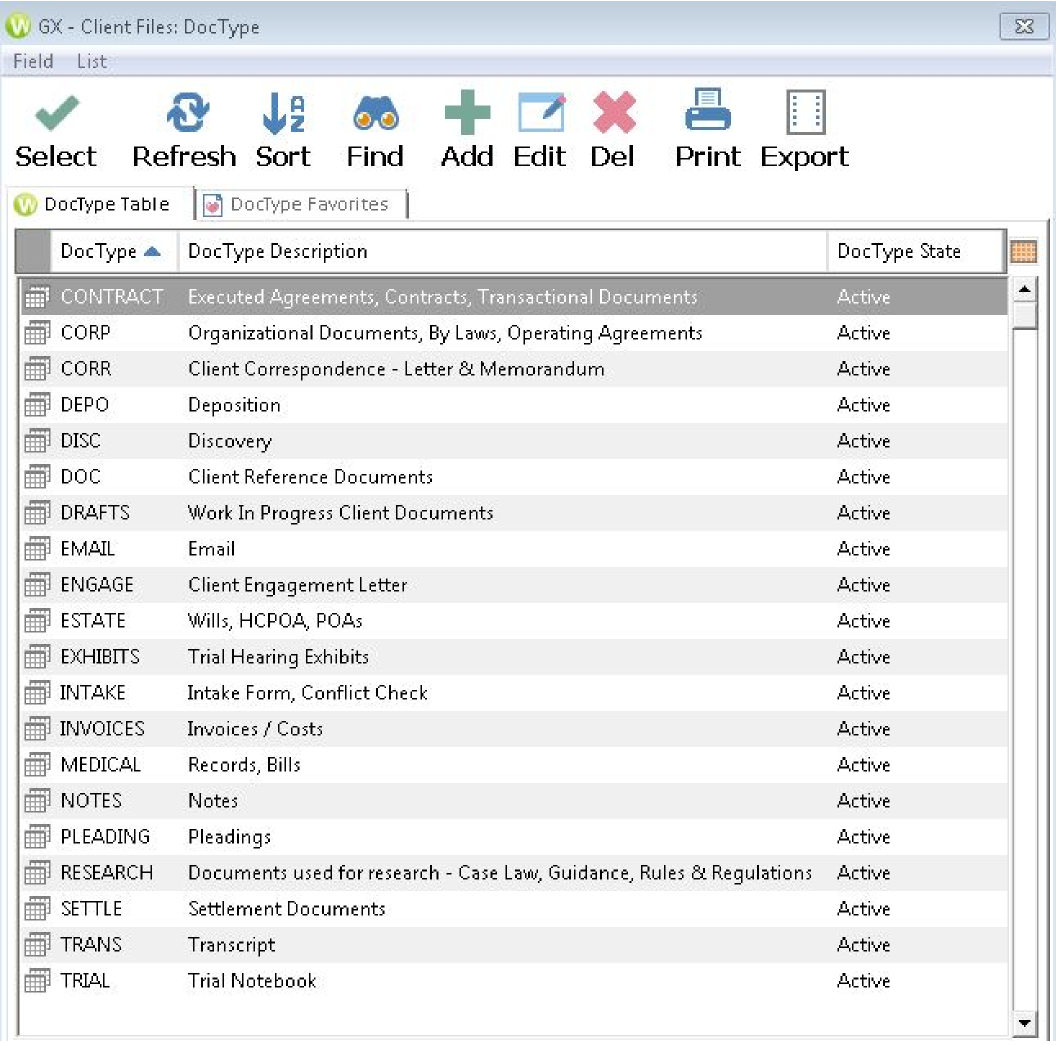
lient Files\8756 - Matter: 16686

lient Files\8756 - Matter: 16838

lient Files\8756 - Matter: 16991

The way your Client File/Matters are organized are then customized for your firm. When you save your file into Worldox you are given fields to complete. While it seems cumbersome, once you have worked in the program for a while this takes no time. It becomes intuitive. In addition, your firm must set naming conventions so there is uniformity. For example, no abbreviations.

One field you will customize is your DOC types. Below are the DOC types that my firm chose. This can be different for each cabinet. Our rule is that unless it is a draft, or a note, there should only be executed PDFs in the DOC type. This makes it easy to know that anything other than DRAFT is an executed or filed document.



DocType	DocType Description	DocType State
CONTRACT	Executed Agreements, Contracts, Transactional Documents	Active
CORP	Organizational Documents, By Laws, Operating Agreements	Active
CORR	Client Correspondence - Letter & Memorandum	Active
DEPO	Deposition	Active
DISC	Discovery	Active
DOC	Client Reference Documents	Active
DRAFTS	Work In Progress Client Documents	Active
EMAIL	Email	Active
ENGAGE	Client Engagement Letter	Active
ESTATE	Wills, HCPOA, POAs	Active
EXHIBITS	Trial Hearing Exhibits	Active
INTAKE	Intake Form, Conflict Check	Active
INVOICES	Invoices / Costs	Active
MEDICAL	Records, Bills	Active
NOTES	Notes	Active
PLEADING	Pleadings	Active
RESEARCH	Documents used for research - Case Law, Guidance, Rules & Regulations	Active
SETTLE	Settlement Documents	Active
TRANS	Transcript	Active
TRIAL	Trial Notebook	Active

Another perk of the document management system is the ability to customize your view. I prefer to sort by DOC type, then by CREATED. But, the beauty of the document management system is that you can make this yours and tailor it to how you work best.

A neat feature is that it also works like Google. When working in your file, you can simply type the name of the document you want to pull up and it will take you to the document. Or, you can use the filters tab to only look at drafts, word documents created by you, etc. It makes locating a document within your file quick and painless.

Finally, Outlook and Worldox (and most document management systems) integrate making the ability for everyone to have access to emails sent and received by everyone in your firm. When you email, the save box will automatically pop up. When you receive an email, you save it to Worldox. Again, these document management systems are so intelligent that they become intuitive and more times than not you are not required to complete the information. You should *not* be working from your inbox but should be working towards Inbox Zero.

While there are tons of items we could discuss with your document management system, perhaps the feature that has all my attorneys saying it is worth its weight in gold, and me thanking the paralegal Gods above, is the search feature. I can search and find a document in minutes. Sometimes less.

The first item to point out is that each night the documents added that day are OCR'd. This means that all documents are made into readable text and made searchable. You then have search templates for each cabinet.

I can search by name of the document or by key words within the document. I can limit this search to documents created within the past 6 months, certain files, or the attorney that drafted it. This is why the naming conventions and DOC type uniformity are so important. But, when I can locate a document I need, out of thousands upon thousands of documents, within a matter of minutes, it seals the deal that document management software is essential to running a paperless law firm.

III. Organizing your Workplace.

Now we have reviewed how to organize our files, the documents we create, and the importance of going paperless, we must organize our work product by utilizing the every day programs that we use. I would guarantee that every paralegal in here touches Adobe and Microsoft Word every day they work. I also guarantee that most of us are not utilizing these programs to be beneficial for us. I openly admit that it is only the past two years I have dug into how to use these programs to work smarter and not harder.

a. Microsoft Word.

My first recommendation, is attend Barron Henley's *Mastering Microsoft Word in the Law Office*, do it. The NC Bar Association is doing video replays of this program in May. It is worth every dime. I learned more in that day than I have learned in all the years I have used Microsoft Word. What I quickly learned is how much I had and still must learn.

We are paid by clients to produce a professional document. These clients do not pay us to learn how to use the programs, they do not pay us to spend hours creating a document that should take 30 minutes due to our lack of technological knowledge, and they do not pay us our hourly rates (mine is $165/hour) to create incorrectly formatted sloppy documents. If you learn to master any program this should be the one.

Mastering Word is not something we can do today, there are books with thousands of pages on this alone, but I would like to touch on a few hot topics that will help you organize your work and produce a better work product.

i. Saving Documents - DOC v. DOCX.

The DOC file extension has been used by Word for a long time, however, the last time it was included in Word was in Word 2003. The next update for Word occurred in 2007 and their default file extension used for word processing was changed to DOCX.

Why did it change? The DOC file format was proprietary to Microsoft. This means that software from other types of word processing products frequently had trouble with DOC files because they couldn't read the files. Microsoft wanted to create a new file extension for word processing that was an open standard format. In addition, DOCX files cannot store macros that contain viruses/malware, where DOC files can.

Moral, any DOC file you open should be saved as a DOCX.

ii. Customizing Word, the Basics.

Foremost, customize your Word. Set your default fonts, paragraph spacing, and line spacing. This will save you minutes every time you open a document. While that seems trivial, each little trick you learn that saves time adds up.

Customization also includes items such as changing your auto-correct options to stop items such as (c) to automatically changing to the copyright symbol.

One of my favorite items to customize is my Quick Access toolbar. If there is a tab or item, I constantly look for in Word I add it to my Quick Access toolbar.

1. Copying and Pasting.

How many of you have went into a document that your attorney copy and pasted throughout from Westlaw or Lexis? The formatting will drive you crazy! Most people simply highlight, Ctrl+C and then Ctrl+V. If you use your mouse to paste when you right click, however, you are given these options:

1. Keep Source Formatting - This option preserves the look of the original text.

2. Merge Formatting - This option changes the formatting so that it matches the text that surrounds it.

3. Keep Text Only - This option removes all the original formatting from the text.

By using your mouse/right click versus Ctrl+V you can control how the items you copy are pasted, which saves you time when making your document pretty, as my attorney calls it. This is also something you can customize for your Ctrl+V.

Besides using the mouse to copy and paste, using the Clipboard feature will save you tons of time, especially if you are preparing discovery responses or other documents that will use the same wording repeatedly.

Did you know that you can copy multiple wording/information in a document and not be limited to **ONLY** the last wording/information you copied when pasting? By opening your clipboard you can view the last 24 items you have copied and paste them into your document. (i.e. Plaintiff denies the allegations in Paragraph; or Plaintiff admits the allegations in Paragraph) We all know how beneficial this is when drafting documents, especially discovery.

2. Formatting.

Another common issue we run into when working daily is formatting. Sometimes you collaborate with people and each one uses different fonts and styles. Sometimes you convert a PDF to a Word document and need to clean up the formatting.

If you have rogue paragraphs that are formatted incorrectly you can use the format painter to replicate the proper format. If you want to clear all formatting in a document, select the text you want to clear formatting on and then select the A with the eraser. Both features are important to making your document uniform and professional.

Finally, you should never ever use the numbering library created by Microsoft to number your paragraphs and headings. Each time you must use auto-numbering you should define a new multilevel list. The reason is that the Microsoft numbering feature is only capable of one level of numbering. So, if you have multiple levels it will not work. By defining your own you can set the multilevel and the indent/tabs locations.

3. Miscellaneous Word Features to Learn.

There are several features you should learn to utilize, these include: changing the case of text; expanding the find and replace (especially searching whole words such as he and she); track changes/comments; creating a table; creating and utilizing the 5 tab types; compare documents; and creating and using the Auto Text Gallery, something I use daily, especially in Outlook for repetitive emails. Finally, mail merge is the most underused, but probably one of the most beneficial features. Learn it!

b. Adobe Acrobat.

Let me begin by saying, convince your attorney to invest in Pro/DC. If you are going paperless it should be fully functional. Adobe may not necessarily be the program you work in all day, like Word, but it is important to being paperless, organizing your workplace, and maintaining an adequate filing system.

Much like Word we could spend all day discussing Adobe, its functions and the best way to utilize the program in a paperless office. Since no one wants to hear me drone on and on all day, I will highlight the important parts and suggest that you should follow up on learning them. This is when YouTube becomes your best friend. You can watch the video and walk through the steps simultaneously!

i. Utilizing Adobe in a Paperless Office.

There are many items that Adobe can be used for. The most common reason we use Adobe is to make a final executed version of a document. This can be accomplished by converting your Word document to a PDF, or printing and then scanning the document. If we are not filing the document, and need not serve the original, then I convert the document and stamp a signature. If I must file the document or serve the original, I will print and scan. Hopefully the Rules of Civil Procedure will make email a valid service method soon. We could cut down on time, money, and save a few trees.

If you convert your Word document and stamp a signature it is always best to CYA. I send my attorney an email with the final version requesting he approve the letter being sent out and his digital signature being placed on it. He could easily holler okay, since I am in the office right beside him, but it documents the file that the letter was approved to go out and that he gave me permission to use his digital signature.

While we are on this subject, never send a letter to opposing counsel in a Word version; believe it or not I see this more times than I would like to admit. Always convert the Word to a PDF. This is important, because while we would hope that no one would alter the document you can never be too sure. Also, please, rotate your pages before you send the PDF to opposing counsel. Is there anything that annoys a paralegal more than getting hundreds of PDF pages no page is facing the same way?

The other main reason I use Adobe is for forms. Whether we are pulling forms from the AOC website, or creating our own, using Adobe to work is an integral part of our day. Gone are the days of mailing huge packets to potential clients, waiting for snail mail to get the documents to them and return them, something that often takes a week or longer. In a digital world we can save time, and keep the case moving, by creating fillable PDFs that our potential clients/clients can complete.

For me, as the estate administration and estate planning paralegal, I created fillable PDF form intakes that clients for both matters can be emailed, completed electronically, and emailed back. This cuts down on turnaround time and allows me to work with the attorney in getting the estate administration opened quicker, or the draft estate planning documents prepared. Believe it or not, creating the form is easy. The key is to have a Word document prepared exactly the way you want the form, using lines to mark where the fillable data should go, convert the Word document to a PDF, and then select create form. For the most part Adobe is intuitive enough to get it right. Occasionally you must add additional fields or change the field names. But the time it takes to create the form is saved on the back-end turnaround time.

My firm is also now using Adobe for intakes. While it is not quite where I want it to be (clients using iPads to complete the intake) we are streamlining the process little by little and helping the environment.

ii. Adobe and its Features.

Much like Microsoft Word there are key features you should learn to master using Adobe. Also, like Microsoft Word, the first thing you should do is customize your Adobe to fit your work style and habits. No one wants to have to dig down five layers of tabs to find the flatten comments action every time you want to flatten your fillable PDF. Therefore, customizing your tool set is essential to maintaining your work flow. As you work one week make a list of the tools you constantly use. At the end of the week when you see which tools are repeatedly used add them to your Quick Tools Toolbar.

Tools I have added include: delete, rotate, and insert pages; extract pages; signature and exhibit stamp; the flatten action; headers, footers, and watermarks; Bates numbering; text insert; and the redaction pen. These essential tools are utilized daily when working in a paperless office and make your job easier.

How many people remember the dreaded Bates numbering stamp? The one you sat there with, stamping thousands of documents for hours. Just when you think you have finished your attorney removes a few hundred pages and you must white out and start over, or just have missing Bates numbers you then must do a log explaining why. Worst days of a paralegal's life, right?! Unnecessary work too. Adobe saves you from ever having to experience this again. Need to Bates number a document? Adobe Pro has a Bates numbering tool. You can type the client's name in before the automatic Bates numbering and you can format the page number to have six zeros, or to start at number 245. Your attorney removes 400 pages? Easy peasy! You can delete or update your Bates number with the click of a button.

Another important feature in Adobe to utilize is the combine files into a single PDF. It is 2019. We should no longer send 30 emails with 20 PDF documents attached to each. All PDF documents should be combined, then bookmarked for ease of review, and sent as one large PDF. Size should not be an issue, as we should also have a secure filesharing program, such as ShareFile, to share the documents.

Finally, learn how to create digital stamps. A digital exhibit stamp will save the firm money and will allow you the ease of rearranging exhibits and quickly marking them for production.

IV. Conclusion.

We could spend all day talking about technology, programs, and the benefits in a law firm. The items above are the basics that any law firm must have and know how to use. Face it, technology is not going anywhere. It will only become more prominent and a more integral part of our day-to-day life. We must all get on board, whether we want to or not. Trust me, I know change is hard. No one likes to change, especially when the system is not broke, so why fix it. The system may not be broke, but it can always be improved upon. The improvements are here to make your life easier, not more difficult. If the new system is making your workload harder, you must reevaluate the system and tweak it. Slowly you will find the one that works for you, and when you do you will wonder how you ever worked in the non-broken system you fought so hard to keep!