

How one innovative law firm pursued the elusive, “paperless office” goal ... and pretty much made it happen.



**Law Offices of
J. Stanford Morse, PA**

Challenge:

Design workflows that link firm software tools and minimize the reliance on paper documents

Solution:

Install Worldox, integrating it with Needles and Fujitsu scanners; deploy the new wdAlert Worldox utility.

Result:

A much smoother and more controlled workflow; a dramatic reduction in paper files.

“I wanted to simplify my life. Worldox helped me do just that.”

By J. Stanford Morse, Esq.
Partner, Attorney

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Background

With more than 30 years of legal experience, J Stanford Morse P.A. specializes in automobile accidents and wrongful death cases. Efficiency and productivity matter here. We never hesitate to implement technology solutions where there will be a quantifiable gain in those areas.

We have long wanted to move to a “less paper-intensive” style of work. We already use the *Needles Case Management System*, and find it well suited to our litigation practice areas. Document management seemed to be the next logical step; we’re a small firm, but still have thousands upon thousands of documents, emails and scanned files.

The Plan

Our team contacted *InTouch Legal*, a leading document management integrator. They suggested Worldox, then demonstrated it us. Together we drew up a plan on how to apply Worldox features to improve our workflow. Right from the beginning, this software felt like a good fit with what we were trying to achieve. In January 2009, I gave the go-ahead. InTouch was onsite here for three days setting up the Worldox application suite.

Objectives

Worldox/Needles integration:

We needed tight integration of document management with Needles, so that our staff could pull up a case within Needles, and be able to with a single click access all case-related documents and emails in Worldox.

Integration with Office Scanners

InTouch suggested that we integrate Fujitsu ScanSnap scanners with Worldox to speed processing of received documents. Great idea. Now



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we simply insert documents to be scanned into the ADF tray and press a button. The document is scanned, OCR applied to the image (allowing for text searches in Worldox), and image corrections are applied automatically. Documents then “magically” appear on workstations as Adobe Acrobat files. Saving in Adobe also saves documents to Worldox.

Document Alerts

We also needed a way to let me know when new, scanned documents are ready for my review. InTouch found the solution in a new Worldox *wdAlert* module – which was still in pre-release testing. This utility searches for documents tagged for review, then prompts me to act as they are found.

Conclusion

It comes down to this: I wanted to simplify my life. Worldox and InTouch helped me do just that.

We’ve moved away from the traditional email attachment mode, keeping everything inside the DMS now, no longer cluttering up Outlook with duplicate document attachments. I am very happy with this new system. Worldox and InTouch exceeded our expectations at each stage of the process.

Worldox is the single most cost-effective purchase I have made in 30 years of practicing law. Training is minimal. Work flow capacity has increased. At the same time, overhead decreased, and the bottom line improved.