

# **Taking Law Office Technology to the Next Level**

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*Law and Practice Update*

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This part of my paper will discuss:

1. Our scanning system
2. Building your own personal cloud
3. Our Remote Server System allowing half our staff to work from home or connected from different offices around the province.

### **Our Scanning System**

Our system is quite simple. We decided to scan all our files on closing and shred the files once closed. It is simple and complicated all at the same time. The first thing we had to do was come up a policy and a system that is strictly followed. This is our basic procedure:

1. On closing out in ESllaw, the file is put into a bankers box marked ``scanning``.
2. The file is then taken apart, anything small is photocopied including the file label and ESllaw intake sheet.
3. The file is then scanned into a dropbox folder synchronized between the personal computer of the person scanning and our office administrator's computer.
4. Original documents ("OD") (such as a power of attorney) are photocopied and scanned; if they came from the client, they are mailed back. If they are original Grants or Probate, powers of attorney or Personal Directives, they are clipped in their own stack and put at the top of the file in the OD box.
5. In our file room, we have one OD file box for every year. Eg, 2008, 2009, 2010.
6. Once scanned, our office administrator goes into ESllaw and puts STS next to the file name. STS means scanned to server. The idea is you will know not to spend 3 hours looking for a physical file in our file room. Our server has two separate hard drives in RAID called O:\ (Old documents); and the folder is then moved from dropbox to the server by the office administrator.
7. If there are Original Documents that we want to keep such as Powers of Attorney, only these are kept in the file (everything else, including the OD is scanned). The file is then put in the OD box in the file room by year. Our office administrator then goes into ESllaw