



DocuLex Does Justice to Law Firm Document Conversion

Atlanta-based Parker, Hudson, Rainer & Dobbs LLP has over 60 attorneys specializing in commercial lending, bankruptcy, corporate, health, real estate, commercial litigation, tax, and employee benefits law. For over 25 years, Parker, Hudson, Rainer & Dobbs LLP has offered a wide range of legal expertise in an environment that combines superior legal talent and work product with excellent service.

After 25 years of considerable accomplishments, Parker, Hudson, Rainer & Dobbs LLP discovered it had a problem – or 14,000 to be more exact.

The Challenge

Parker, Hudson, Rainer & Dobbs had over 14,000 boxes of documents in off-site storage and another 500 in its Atlanta office. With the majority of PHR&D clients being financial institutions, many of the boxes contained files from closings of large transactions that had accumulated over the years. How to retain these documents as necessary, while providing easy access to them?

Paying thousands of dollars per month in document storage fees, and additional fees to have any boxes retrieved from storage or returned to the warehouse, the firm decided enough was enough. Benita Dansby, IT Manager for PHR&D, was tasked with finding the best solution for the problem.

“Our firm is committed to employing the best methods to effectively service our clients. We had to find an economical way to organize the documents that must be retained,” said Benita. “We had entire rooms on-site full of paper, not to mention the boxes stored off-site. In addition to the cost of having things hauled back and forth, we were losing square footage in the office and valuable time paying someone to find a document when it was requested by an attorney. We knew we needed to convert this paper to a digital form that could be easily stored, searched and retrieved.”

Another challenge? Convincing the 130+ staff that conversion would not create more work and persuading the attorneys to part with their paper. Concerns about misfiling, security and lost files all came into question during the evaluation process.

“Any conversion and management solution was going to be tough to get approved,” stated Benita. “I knew that any solution I chose had to be sophisticated but user friendly, must have great search functionality and had to be customizable for our specific needs. I was then going to have to prove absolutely to the attorneys that it worked.”

The Solution

After careful consideration of exactly what PHR&D would require in a document management system, Benita with approval from the Firm partners decided on Archive Studio by DocuLex. Easy to use and flexible, the DocuLex Archive Studio package includes a convenient document scanning software component called Office Capture. Office Capture allows quick capture and conversion of documents to fully searchable PDF files. Once a document or set of documents is scanned, the Office Capture software automatically takes the scanned image file, OCRs it, indexes the documents per the user’s specifications, and files said documents on a server, based on a pre-determined file structure customized for the user.

Using Office Capture, Benita created a cover page template to be added to each document or group of documents that needed scanning. The cover page included selectable custom index metadata per Benita’s specifications, such as client name, date and case number. The various legal secretaries in the office then quickly filled out the cover page with the proper specifications, selected from Benita’s



“We are committed to a continuing program of upgrading our technology and communications infrastructure and capabilities in order to better serve our clients.

We recognize that responsiveness is a critical component to our performance.

This commitment to our customers is the very reason we integrated Archive Studio by DocuLex, so our attorneys can access documents and research tools regardless of whether they are in the office or on the road.”

template, for each document or set of documents to be scanned. Using a Fujitsu 5650 document scanner in a centralized area of the firm, employees were able to scan documents when time allowed, with the Office Capture software doing the filing automatically.

After the capture process, PHR&D employed another component of the DocuLex Archive Studio™, called WebSearch™, for easy search and retrieval of the electronic files. Browser-based WebSearch is designed to search document-specific descriptions or a combination of keywords, and is permission-based to share across the organization.

Said Benita, "Using the Archive Studio from DocuLex was an easy learning process. The software allowed me to enable security features that set limits on readability of a file. I was able to set up different levels of security for different departments, which is a must in a law firm. It took less than an hour to train anyone to create a cover page with Office Capture to get their documents into the system, plus teach them how to retrieve those documents using WebSearch. WebSearch gives you many ways to search for a document, and it is super accurate. It is easy to locate even a short letter from 1982 that is in the middle of a huge file."

The Results

Through the fast and easy incorporation of the DocuLex Archive studio, PHR&D is now able to accurately retrieve any and all information related to a certain file or case.

"I thought integrating DocuLex's Archive Studio and getting rid of this paper would be a long process, but it is going faster than expected," said Benita. "Install took less than a ½ a day and I was able to do the employee training myself after I was trained on the system. DocuLex offered excellent support and promptly addressed any questions I had. They also listened to suggestions and many times incorporated those ideas into the software. I especially loved the remote support capabilities when I needed a question or issue addressed immediately. Based on all of these factors, I am confident I am using all the capabilities of the software to quickly and accurately convert our vital files.

Today, PHR&D employees know how to access the system and retrieve documents using WebSearch. PHR&D employees have realized the benefits of getting rid of all the paper by opening up physical space in the firm and having instant access to any document they seek. Instead of creating boxes to store files when a case is over, they now march right to the scanner and capture the files electronically.

"The Archive Studio solution is actually making our employees more effective, which translates into huge cost savings," emphasized Benita. "The OCR component of the Office Capture software is the best I've ever seen – highly accurate and truly amazing. I have not the slightest concern that something is going to be misfiled or lost based on this accuracy, and I know we can find anything using the WebSearch functionality. Originally, the attorneys were skeptical, so Benita tested Archive Studio every way they could imagine to trip it up. They couldn't do it. The attorneys have been won over by DocuLex – they are comfortable that their documents are being stored securely and can be found easily. We actually have people volunteering to work weekends on the capture process! That is how much easier their jobs are now that much of the paper has been converted to searchable PDFs. The firm is anxious to get everything in those 14,000 boxes converted, and we are well on our way. Additionally, I now see the great things I can do for the firm in the future with DocuLex's Archive Studio. I want to have scanners on all desktops, to make our day-forward document capture instantaneous. The great news is that Archive Studio from DocuLex can support a distributed scanning environment easily - no more expenses have to be incurred."

About DocuLex

Established in 1996, DocuLex provides industry acclaimed document management software. DocuLex's complete solution addresses the business need to effectively manage scanned documents, electronic files and email. DocuLex software is utilized by a wide range of industries, and has a user base that includes everything from small businesses, departments within companies to enterprise-wide installations. Achieve instant document access - anytime, anywhere.

For further questions please contact info@doculex-usa.com

About Parker, Hudson, Rainer & Dobbs LLP

Parker, Hudson, Rainer & Dobbs LLP is a multi-specialty law firm, with practice areas in commercial lending & bankruptcy, corporate, health (corporate and regulatory), litigation, real estate, and tax & employee benefits law. 2006 marked the firm's 25th year as a member of Atlanta's legal community and it now has over 60 attorneys serving clients from offices in Atlanta, Georgia and Tallahassee, Florida. Parker, Hudson, Rainer & Dobbs LLP offers a full range of legal expertise in business matters in an environment that combines superior legal talent and work product with the advantages of excellent service, lower overhead, and efficient billing rates available through a mid-sized firm.

DocuLex™
Document Management Software

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