# Paperless Office Training

## Scanning

The ScanSnap scanners provide fast, duplex scanning which can be generated to several file formats, including PDF. Also, the ScanSnap software enables the user to default the output format, output folder, control DPI and file size, and paper format.

In a paperless office, it is important to use the Scanner as an “In Box”. This means that when users open the mail, they scan instead of file. Users can scan directly to Adobe, and use the macro to save in QuikDocs. Or, they can scan to the Multi folder and then Batch Move. They can also scan to My Scans and then drag and drop into QuikDocs. There is no one option, just the one that works best for each individual office.

## Default Folder Path

From the Save tab, users can choose the default path for all scanned images.

## Scanning Settings

Customizing settings in the Setting tab in the ScanSnap software will improve speed, image quality, and reduce file size.

Image Quality-Normal (fastest)
Color Mode- Black and White

## Scanning Profiles

The full menu of ScanSnap allows users to switch profiles to meet various scanning needs.

Example: Users can create a Color Docs profile so they can easily switch to appropriate settings to support a color scan. This may be helpful when scanning official documents with red time/date court initiated stamping.

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### Web Resources

http://www.fujitsu.com/us/services/computing/peripherals/scanners/support/docs.html

## Faxing

E-faxing takes a phone number (toll free or local depending on preference) and turns it into an email address. This allows the document to be sent via email as a fax.  This works for incoming and outgoing documents.

Internet fax services offer the convenience of email and the power of the Internet to make it easy to send and receive faxes from anywhere.  E-faxing eliminates the need for a fax machine, an extra telephone line and all the associated expenses (paper, ink cartridges, etc). You fax via a fax number that's tied to your email and send and receive faxes as email attachments.

**Example:** Jane Smith has an account and her toll free fax # is 1-800-555-1234.  John Smith wants to fax her a work receipt.  He goes to a fax machine and enters her fax number and sends.  She receives this in the form on an email.  Now, Jane wants to take a copy of a bank statement and fax it back to John.  She scans this and then emails this to the fax number he is at (949-222-3322).  She would email him the scanned document to 9492223222@faxprovider.com.

The body of the email becomes the cover page.  The service provides often provide sample templates for your fax cover sheet that can be used when composing email.

### Web Resources

www.myfax.com
www.smartfax.com
www.saveonfaxes.com
http://www.efax.com/en/efax/twa/page/howItWorks

## Working with PDF Documents

Trustees and staff can increase the functionality of their PDF documents by using the following features:

**Comments**

- Users can place post-it notes within the document to add notes. These virtual "stickies" are tracked though the Comments Tab and can be printed.
- Go to Edit, Preferences, and then choose Commenting to set additional preferences for this tool.

**Stamps**

- Adobe provides a standard set of commonly used stamps, or users can create their own.
- Go to Comments, Commenting Tools, and Stamps to create and organize the Stamps.
- Stamps appear as Comments under the Comments Tab.

**Text highlights**

- The virtual highlighter allows the user to quickly highlight, underline and cross out text.
- Go to Comments, Commenting, and Highlighting and select the Tools.
- Highlights appear as Comments under the Comments Tab.

**Copy to Clipboard**

- Using the Select Tool, users can highlights a select section of text and copy this to the clipboard.  This can be pasted into other applications such as Word.
- Go to Edit, Copy File to Clipboard to copy the entire document to another application (such as Word).

**Typewriter**

- This tool was added to allow text to be added anywhere within the document.  It is surrounded by a sizable box that can be easily relocated by drag and drop functionality.
- Go to Tools, Typewriter and click in the document to begin typing.
- Typewriter text appears as Comments under the Comments Tab.

**Text edits**

- The Text Tool allows user to insert, cross out and replace text.
- Go to Comments, text Edits and choose the Text Edit function from the menu.
- Text Edits appear as Comments under the Comments Tab.

**Search**

The Search option allows user to search by word or phrase in one PDF, or all PDF's on the PC.  The search can look for Whole Words, Case-Sensitive, include Bookmarks and Comments.

## QuikDocs

QuikDocs manages and organizes files, filters and sorts, as well as exports and appends documents. Through QuikDocs, users can maintain their documents in one central location while continuing to work independently in CaseLink.

- **Drag and Drop Email**-Users can tile the screen or use dual monitors to drag and drop the emails directly into QuikDocs.
- **Macros**-Users can use the Outlook macro to save into QuikDocs.
- **Wav. Files-**Users can drag and  drop, or save directly to QuikDocs from programs supporting this file type.
- **Subfolders-**To help minimize document appearing in default view, Subfolder usage helps organize documents while cleaning up the view for the more important case documents.
- **Outlook Integration-**Configure the BMS Agent to route emails to designated folders with QuikDocs
- **Find Documents-**Search by source, subfolders, document name, description, and comments
- **Personal Folders-**Store non case specific documents such as Bank Reconciliations, Quarterly Reports, and Audit reports.
- **Email-**Send documents directly to email recipients by clicking the email button
- **Copy-**Use the feature to make an identical copy of an existing document in QuikDocs.  This is handy for “clean” copies, and copies with annotations.
- **Reports**-Preview and review ECF reports to examine incoming documents, cases and dates

## Burning CD's / DVD's

Data and documents can be exported from CaseLink and burned to CD's/DVD. Trustees can maintain a virtual CD library of cases with this media solution. Often, trustees will move old closed cases (closed in excess of 2 years) to a DVD, lock the DVD and purge the paper files.

Also, trustees utilize this process for 341 (a) meetings. They will export all docket cases and documents and use the CD as a resource during the hearing. This can be handy for additional staff members in attendance at the hearing.

DVD's are a great way to execute a data backup on the server hard drive. Through the backup software, backups can be written to DVD and then stored in the safe or taken offsite to meet the criteria of an offsite backup.

CD's/DVD's can be generated from XP, or through the use of software such as Roxio Easy CD Creator. To save time, purchase preformatted CD's/DVD's.

**XP**-Right Click over file(s) and click Send To, then chose the drive-usually D: or E: Then, go to the appropriate drive and click File, Write these Files to CD.

**Roxio**-Go to Select Source files and choose the files to burn, then click the Add button. This will move the files to the lower portion of the screen. These are the files to be burned. Click the red Record button. The Option menu allows the user to choose defaults such as Finalize session, not CD. This option will allow the user to burn again to the same CD if enough room is available.

**Tip**: To see the size of a given file, just right-click on it (in Explorer or My Computer) and select Properties from the resulting menu.

## Email

Paperless offices rely heavily on email; often receiving voicemail, faxes and electronic notices from the court. Outlook is the most common email tool used in a paperless environment. With that in mind, below are some options in Outlook to help users manage email.

## Organizing

Go to Tools, Organize

- Users can setup folders, and move existing document into these folders
- Color coding can be added filter emails by contact
- Email views can be changed/controlled from this option

Save into QuikDocs

- New source added in 10.5 for email
- Drag and drop or use the Outlook Macro

## Rules and Alerts

Using the step through Wizards, users can define filters to route email to specific folders, as well as control email from users based on rules.

Rules *(One or more automatic actions taken on e-mail messages and meeting requests that meet certain conditions, along with any exceptions to those conditions.* Rules, also referred to as filter, help you manage your e-mail messages by performing actions on messages that match a specific set of conditions. After you create a rule, Outlook applies the rule when a message arrives in your Inbox or when you send a message. For example, you can automatically:

- Forward to your manager all messages sent by Jane Smith when they arrive in your Inbox.
- Assign the category Sales to all messages you send that have the word "sales" in the Subject box.
- Flag each meeting request or meeting update you receive from your manager.

Rules fall into two general categories: notification and organization. Notification rules alert you in some way when you receive a particular message. For example, you can create a rule that automatically sends an e-mail message to your mobile telephone when you receive a message from a family member.

Organization rules perform one or more actions on a message. For example, you can create a rule that moves certain messages to a folder or flags them for follow-up on a particular day.

You can also run one or more of your rules manually. Running rules manually allows you to selectively apply them to messages already in your Inbox or in another folder.

You can add exceptions to your rules for special circumstances, such as when a message is flagged for follow-up action or is marked with high importance. A rule is not applied to a message if any one of the exceptions you specify is met.

***Note:*** *Outlook Express also has a Rules Wizard to manage incoming and outgoing mail. While it does not have as many features it is very effective in organizing mail.*

## Outlook Integration

Users can right click the BMS Agent and enable emails to route directly into QuikDocs. From the QuikDocs tab, you can add new lines of criteria to define how email is routed to cases, the multi folder, or personal folders. Also, users can set an option to create separate QuikDocs entries for each attachment in the incoming email. Emails in Outlook can be deleted once imported in QuikDocs by checking an option to remove the email once imported.

## Dictation Software

There are many options to record sound from the laptop.  One tool used by trustees is Dictation Buddy.  A free trial has been included in the supporting documentation.

The software allows users to create individual wav. files as they stop and start the recording.  These files can be saved into the Multi folder in QuikDocs, or in folders by 341 (and then by drag and drop).  Again, there is no right way, just individual office preference.

The software allows users to set the preferences to save the files, and offers the option to add a prefix to the file name (example 5-30 341).

Also, the software has a notes feature, allowing the user to key in notes that are tagged to the recording.
A Bookmark feature provides a tool handy for dictation.  The trustee can highlight specific locations within the file with notes.

There are many dictation software options available for trustee use.   Some use foot pedals, and most use integrated microphones from the laptop.

### Web Resources

http://download.cnet.com/Dictation-Buddy/3000-7239_4-10050668.html
http://www.dragontalk.com/

## Off-site backups

Trustee offices can independently partner with an offsite backup company to protect all of their office files. Typically these companies charge a flat fee, and tier the price by additional storage needs. They do a constant backup; the backup is real-time and does not involve the synchronization of large data packets.

### Web Backups

These service providers offer various product features such as:

- Data encryption
- Document hosting
- Remote access
- Collaboration
- Multiple redundancies for additional protection

### Document Management

Another option with many providers is document tracking, archiving, coding and status reporting. Users can keep e-libraries of their documents, search for content, assign codes (similar to case numbers) and managing upload history. Also, users can offer sub accounts to expand the service to other remote users.

## Web Resources

http://www.datadepositbox.com/
http://backup.ironmountain.com/plans/soho.asp
http://www.ibackup.com/
http://www.amerivault.com/
http://www.datavault.com/
http://www.iomega.com/na/products/istorage.jsp
http://www.roxio.com/enu/products/backontrack/online/overview.html
http://www.usdatatrust.com/