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Some five thousand years ago mankind started writing down his experiences. Initially early scribes used pictures. This evolved through Sandscript and eventually developed into a number of standard symbols representing objects and letters that make up our words.

Having chipped away at stone, they found that papyrus was a lot more mobile and eventually refined it into modern paper. They next learned how to get a machine to print rather than having to re-write copies of documents. Then everything stopped for four hundred years. Mankind's obsession with paper had taken hold.

Jump forward to the present - the early days of a new millennium the "electronic reading tablet" was invented – Apple, Android, Kindle et al. So we don't need to take books on holiday.

The next leap forward is not exactly gigantic – in fact it will not even register in history twenty years down the line. However it is significant now.... Why not use this simple technology at work and have our paperwork on a tablet rather than all over desks, window shelves and filing cabinets.

Ah – that's a great idea, but how do we get all this paper inside the tablet?

Well that's the simple bit – all documentation today is computer generated (when was the last time you got a hand written letter). So if it is computer generated it can be printed electronically as a PDF. And if it hand written then scan it as a PDF.

Now let's move on to really seeing some benefits over and above a clear desk. Nowhere are these clearer than in the legal field. It is staggering just how much time and money is wasted here in photocopying draft documentation, preparing Court Bundles, Contract Packs and Deal Bibles?

How much does it cost to archive files, most of which will never see the light of day again and those that do have to be located from somewhere in a warehouse, which looks the closing shots of an Indiana Jones film?



And tell me how do you make printed confidential documents secure? You can't – it is down to the sender, the courier and the recipient.

So I would ask you to consider the following minor steps in the evolution of documentation in the legal profession and the advantages of making this “small step for mankind”.

## Court Document Bundles

Electronic Court Bundling works by reading documents (Word, Spreadsheets, PDF's, emails, Visio diagrams, Video and Audio files) related to the case and bundling them into one PDF.

What's more it can automatically pull these files from a Case (or Document/Matter) Management system anywhere in the firms IT system and from servers or PC's on your network.

If you make changes to the source documents you simply re-generate the bundle, which will re-paginate and re-index automatically. You can even insert new documents without upsetting the initial indexation.

The system works with Templates, meaning that you don't start from scratch – you simply change the parties and the documents (where necessary) and job done.

Once in an electronic format the bundle can be delivered through secure (non email) delivery to recipients worldwide in seconds and delivered to Servers, PC's or Tablets.

Because it's automatic it eliminates common simple errors such as wrong pagination and collation errors.

It means that staff are working more efficiently and can now have the menial tasks removed from their job description.

As with all the best ideas it's extremely simple and yet the profession's adoption rate, although increasing, is still criminally low.

## Archiving

It seems there are two current options – store it yourself or hand over the paperwork to a professional such as Iron Mountain.





By archiving electronically, namely taking the case documentation and converting automatically into an indexed paginated Documented Archive Bundle then the resultant PDF can be stored with and retrieved from a secure third party which may be in the cloud. Alternatively there is also no reason why a local archive should not be set up in tandem.

This substantially gets rid of the paper files, the electronic documents cluttering up your Case Management system and your local and intranet servers. And the costs are minimal too compared with conventional, paper based, archiving.

## Compliance Reviews

We live in an age of compliance, where Risk (however small) has to be eliminated.

To support this we go through regular compliance and governance reviews (internally and externally) to ensure our professional standard are not being compromised by process or people.

Whether it be SRA, Lexcel or ISO the objectives are the same and the processes similar. Case reviews are at the core of the compliance tests and compiling copies of case documentation for review takes time and money.

But by electronically converting the case documentation into an indexed paginated Documented Compliance Bundle then the resultant PDF can be stored and/or securely delivered to the compliance party without having to provide access to your own internal systems or other data that the reviewer should not have access to.

It saves all parties costs and time as well as speeding up the whole process.

## Contract Documentation

Contract Packs (e.g. Sales and Purchase Agreements, Disclosure Bundles, Tax Covenants, Service Contracts) can be assembled in the same way as any other bundle.

Simply reading source documents such as Word documents, Spreadsheets, PDF's and emails and bundling them into one PDF.

Contract Packs can then have confidential passwords added and securely delivered to third parties.



## Confidential Documentation

Confidentiality is key when dealing with sensitive cases. It may be that a single document or a complete of bundle of documents need security.

Security through passwords, redacting and electronic signatures can be added to electronic documents (singly or bundles). This will ensure confidentiality and provide a higher level of governance in delivering a fully compliant service to your clients.

## Deal Bibles

With Deal Bibles the process is the same, except that the source documents remain in their native format, rather than being converted to a PDF.

Deal Bibles can then be allocated confidential passwords and be securely delivered to third parties.

## General Bundling

Indeed any Bundles can be assembled in the same way. Simply reading native source documents such as Word documents, Spreadsheets, PDF's, Visio diagrams and PowerPoint and bundling them into one Indexed, Paginated PDF.

The PDF can then be sent securely or stored locally or in the Cloud.



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## About Zylpha

Founded in 2004 as a Case Management Consultancy, Zylpha released its first product in 2010.

Since then the company has gained over 100 clients in the Legal Profession and the Public Sector.

The last few years have seen substantial growth. The company has and will continue to re-invest its profits in new exciting products for the legal process automation market.



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