



# **Pacific Legal Technology Conference October 10, 2007**

**Integrated Back Office, Front Office and Lawyer's  
Office: Case Management, Legal Accounting and  
Practice**

Dan Gleadle

*Employment  
Law  
Strategies*

**TevlinGleadle**

# TevlinGleadle's Practice Needs

- Commenced Operations in 2000
- Exclusively employment law (little unionized work)
- Mainly litigation (wrongful dismissals, post employment competition, human rights) also draft employment agreements
- Small Firm (6 lawyers) – no plans to grow larger
- Opportunity to adopt new and efficient systems

# TG's Systems

- Wired/Wireless network via Windows Server
- Separate server to run certain applications (phones, SQL server)
- Microsoft Exchange Server (enables easy remote access to Outlook)
- Workstations run Microsoft Office (Word, Excel, Outlook) Adobe Acrobat and Prolaw
- Daily backup to usb Hard Drives in rotation, onsite fire safe, offsite
- Fax to lawyer's pc's, as well as main fax to workstation (no fax machine) Outgoing faxes via scanner, then Winfax
- One large network printer/scanner/copier (Canon ImageRunner 5000)

# TG's Lawyers & Staff

- 6 lawyers
- 1 office manager, legal assistant (senior staff)
- 1 junior staff (reception, incoming mail, scanning, junior secretarial)
- 1 part time bookkeeper (about half days)
- External accountant (annual)

Reason: systems are efficient

# the “Less Paper” Office

- Paper files exist but are not main repository of information, lawyers do not normally refer to paper file
- Many relevant “documents” never exist on paper (emails, faxes)
- Incoming documents are scanned to adobe in .pdf format
  - **Letters**, scanned, then filed not in client file but in chronological file, pdf is electronically filed in Prolaw “matter”, emailed by reception to all lawyers and assistant on file
  - **Faxes**, print to .pdf, into matter, electronically
  - **Client documents** (scanned if not too voluminous – also books)
  - **Emails** – simply dragged into Prolaw Matter

# Benefits of the “Less Paper” Office

- No need to search for paper file
- Paper files much smaller, less storage
- File can contain everything lawyer needs
- Can access file from any internet connection (VPN, Remote Desktop)
- Lawyers can easily collaborate
- Less paper is used
- Once documents in electronic form, easy to circulate to clients, others

# Prolaw: a truly “integrated” solution

- Prolaw is part of Thomson, Elite
- Growing number of users in Canada
- One program is used by the lawyer for practice management, and backoffice staff (or lawyers) for accounting, billing, reports, and the like
- No need for various software programs to handle all these different tasks

Live Demo on “evaluation” database