



*PaperWise for Legal*

### PROFILE

- South and Associates
- Legal Industry
- USFN Member

### HIGHLIGHTS

- Integrates with CaseMax™
- Currently scans and indexes over 100,000 images/month
- Reduced offsite file archives by more than 90%
- Retention policy reduced from 7 years to 7 days
- 95% of inbound paper is shredded and recycled
- PaperWise regarded as essential to viability of the firm

Since 1995, South and Associates, P.C., has been a pioneer in the design and development of leading-edge automated case management software technology specific to the foreclosure and defaulted loan industry. Built to maximize efficiency, the system was designed to process thousands of files and hundreds of thousands of simultaneous tasks – all managed by a sophisticated workflow engine.

In its promising beginnings, however, the system had a pronounced Achilles Heel: manually transferring stacks of documents from person to person created an enormous drag on an otherwise well-oiled machine. In 2004, South turned to PaperWise to help design and implement an integrated document management system to eliminate an overwhelming number of physical documents and round out the last piece of the technological masterpiece now known as CaseMax™.

In 2005, South rolled out its customized imaging and document management system. After a 3 month departmental phase-in period, more than 3000 active files were scanned and imaged to the digital casefile. Back scanning occurred on an as needed basis. Near instantaneous document access allowed the Firm to improve efficiencies beyond anyone's wildest expectations. The Firm's paper retention policy was reduced from 7 years to 7 days. Approximately 95% of inbound paper is now shredded and recycled. The Firm now scans and indexes over 100,000 images per month. The Firm also reduced its offsite physical file archives by more than 90%, further reducing fixed monthly overhead.

A majority of the Firm's mortgage banking clients require their service providers to be on the cutting edge of technology, especially with respect to data privacy and document security. Enhancing the CaseMax™ system with the power and functionality provided by PaperWise out of the box

## TECHNICALLY SPEAKING

Initially the Firm relied on the PaperWise-managed enterprise appliance for data storage and backup. With year over year sustained growth, the Firm eventually moved to an enterprise leasing arrangement. The Firm currently maintains the PaperWise system on three distributed servers using an HP Proliant DL 380 g5 as the main file server for all “tck” files. The SQL database resides on the main SQL server (also an HP Proliant). These servers run very similar hardware except the processor and RAM on the SQL server are considerably more powerful than on the file server. The PaperWise management console, integration services and WebWise services all reside on a VMware ESXi Virtual Machine. Modularizing the server side with respect to the PaperWise system provides a much simpler and hassle free IT environment. The Firm generally prefers to stay within the Microsoft line of business server products.

## PERFORMANCE GAINS

Since implementing document management, South and Associates has experienced countless efficiency gains. The firm currently indexes over 100,000 images per month. There are virtually no physical files at their four locations. In fact, less than 1% of all files are stored in physical folders. Without a document management system, South and Associates would not have been able to expand to Wichita, St. Louis, and Omaha, significantly impairing the firm’s future viability and sustainability.

allows the Firm to minimize direct labor costs while maximizing the native efficiencies of the powerful case management system. The Firm is adamant about providing the essential tools to its employees to allow them to function at peak performance levels. PaperWise is one of those tools and is now regarded as essential to the viability of the Firm.

By providing excellent technical and customer support, PaperWise has been and continues to be a top tier service provider to the Firm. The regular cycle of enhancements and upgrades from PaperWise has proved to be a great complement to the CaseMax™ system.

With over 130 employees scattered throughout 4 offices in 3 states, it is now a safe bet that no one will again receive the dreaded email to “everyone” inquiring where a particular misplaced file is located.

**Michael Zevitz, Shareholder**  
South and Associates, P.C.

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