STEP INTO THE WORLD OF DOCUMENT MANAGEMENT

By Craig Williams

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Are you still using Windows Explorer to electronically file your documents? Are you still searching through the "tree" on your computer's hard drive to find computer files of documents you've drafted for your clients?

Certainly "still" could be viewed as pejorative here, but I mean it more in the literary sense, to convey foreshadowing. You see, there are other ways. Much better ways. Using the tree method to find your documents is cumbersome and inefficient, but there are several software programs out there that will change the way you use your computer system like night is to day.

This software category is known as document management, and these programs will allow you to search for a single word across all of your documents, and then report back to you with every document that ever mentioned that word. Say, for example, you have to file a Writ of Attachment for one of your new clients. You remember that last year you wrote one that would make a good exemplar, but you can't remember when, or which client, and now you can't find it no matter how hard you've searched.

With a document management program, you simply enter the word "attachment" into the search box, and within seconds, the program will present you with the Writ of Attachment you filed last year and viola, you're off to the races. These programs allow you to categorize documents by client, client matter, author, date drafted, date revised, type of document and an entire host of other choices.

You're beginning to see the light, and once you make the switch, you won't understand how you ever managed to practice law without document management. In just four years, our law firm has amassed more than 75,000 separate documents. Without document management, we'd never find a thing.

There are a wide variety of programs, ranging in price from free to several hundred dollars a seat (user), and corresponding amounts of features that they provide. Google offers a free desktop search engine, and while it's fairly efficient, it lacks any substantive features. If budget is a concern, then you can find Google's search engine here.

For those interested in performance and ease of use, there are several other programs available, including: Worldox, iManage and Hummingbird. While my firm uses Worldox, many others use both iManage and Hummingbird. Unlike the other two, Hummingbird manages your documents off-site in a secure location. Worldox and iManage are internal to your law firm.

Worldox requires its own server and is fairly robust, plus it offers a companion program called Worldox Web that allows your clients access to their documents on the Internet through a double-passworded system. Our clients love to be able to access their entire file 24 hours a day, seven days a week and 365 days of the year, and while the client's paper file certainly belongs to them, we charge a small access fee for this additional service. Many large firms use iManage and find the program to be very suitable for their needs.

Don't restrict your thinking to just documents. These document management systems organize every type of computer file, from Adobe files, to e-mails, to pictures, and everything in between. If you're looking to make one improvement to your computer system this year, then document management is probably the best place to start. For a relatively small investment, you'll recover the cost in time saved.

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