

Find Documents Without The Drama – Document & File Management

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I. DEFINITIONS:

- A. **Document Management:** Electronic document management refers to the process of creating, organizing, storing and retrieving electronic files. Electronic files include MS Word files, Excel files, PDFs, email (the text of the email itself), attachments to email (whatever form that takes) and the like.
- B. **Document Management System "DMS":** A DMS is a combination of software/hardware tools which streamlines and automates the process of Document Management. Since DMSs only manage electronic documents, paper documents must be converted (scanned) so that they can be managed by the DMS. In simple terms, your paper "Files" are just collections of paper documents related to a particular matter. Once all of that paper is in digital form, a DMS can organize it by matter just as your paper files are currently organized.

II. DOCUMENT MANAGEMENT ISSUES: Managing electronic documents is a problem for almost every law firm and legal department. Here are a few issues that you may be experiencing.

- A. **Wheels Reinvented Because Documents Cannot Be Found:** For example, assume Sarah is a real estate lawyer and 5 years ago, she represented the owner of a building who wanted to lease the entire first floor to an individual for a new restaurant. Sarah conducted extensive research surrounding all issues of restaurant leases and drafted an excellent instrument that protected her client from virtually every angle. Now another client needs a similar lease. If Sarah cannot remember the name of the previous client and locate the lease she drafted, then she'll have to start all over again and waste hours conducting the same researching and writing she did 5 years ago.
- B. **Huge Quantity of Electronic Documents:** Obviously, most law offices are prodigious producers of electronic documents. As a result, it is not uncommon for even a small law firm or legal department to have hundreds of thousands of electronic documents. As you know, it's hard to keep track of 100,000 of anything, much less electronic files scattered across hundreds of folders and drives on your network.
- C. **No Office-Wide Forms Bank:** Having a well-developed forms library can save hours a day. However, without a means of organizing, sharing and protecting form documents from accidentally being over-written, creating a forms bank can be pretty difficult. In most cases, each individual user has their own set of forms, but they have no way of knowing about or using forms that others in the office have created and maintain.
- D. **Inconsistent File Naming Convention:** Users tend to use different file naming conventions that often only make sense to them. As a result, it becomes