

# **Find Documents Without The Drama – Document & File Management**

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<b>I.</b>	<b>Definitions .....</b>	<b>1</b>
A.	Document Management .....	1
B.	Document Management System "DMS" .....	1
<b>II.</b>	<b>Document Management Issues .....</b>	<b>1</b>
A.	Wheels Reinvented Because Documents Cannot Be Found .....	1
B.	Huge Quantity of Electronic Documents .....	1
C.	No Office-Wide Forms Bank .....	1
D.	Inconsistent File Naming Convention .....	1
E.	No Document Tagging .....	2
F.	Overly Complicated Folder Structure for Electronic Files .....	2
G.	Duplicate Folders .....	2
H.	Some Documents Are Stored on C: Drives Rather Than Server .....	2
I.	No Way To Share Research .....	2
J.	No Way To Share Templates .....	2
K.	No Filing System for Scanned Documents .....	2
L.	Difficulty Sharing Documents and Information .....	3
M.	Multiple Offices Create Logistical Problems .....	3
N.	Operating Systems Lack Document Management Tools .....	3
O.	Inadequate Search Capability .....	3
P.	Lost Documents .....	4
Q.	Email Issues .....	4
1.	Email Overload .....	4
2.	Exceeding Email Storage Limits .....	4
3.	Inboxes Are Inappropriately Used For Document Management .....	4
4.	Email Is Not Searchable By Anyone Other Than Owner .....	4
5.	Printed Email Overloading Paper Files .....	5
6.	Lack of User Knowledge About Outlook .....	5
7.	No Email Archiving .....	5
8.	Huge Number of Emails in Inboxes .....	5
<b>III.</b>	<b>Simple Document Management .....</b>	<b>5</b>
A.	The Tools You Need .....	5
B.	In Word and Word Perfect, you can define a document with more detail than just a document name .....	5

C.	Creating a Filing System.....	5
D.	File Naming Conventions .....	6
E.	Searching For Documents.....	6
1.	Word Processor Searches .....	6
2.	Windows Searches .....	6
3.	Search Utilities.....	7
<b>IV.</b>	<b>Features To Look For In a Document Management System.....</b>	<b>7</b>
A.	Ability To Save and Manage Any Type of Document .....	7
B.	Forced User Compliance.....	8
C.	Email Integration.....	8
D.	Integration With Other Programs You Already Use .....	8
E.	Integration With Any Case Management Program You Are Considering .....	9
F.	Metadata Searches .....	9
G.	Full Text Searches .....	10
H.	Date Range Searches.....	10
I.	Fast Searches.....	10
J.	Security .....	10
K.	Check-In/Check Out Capability.....	10
L.	Version Tracking and Audit Trail .....	11
M.	Ability to Compare Documents .....	11
N.	Archiving Old Files .....	11
O.	Remote Access/Offline Access.....	11
P.	Scanning Integration.....	11
Q.	Consistency.....	11
R.	Training Must Be Included.....	11
S.	Intelligent Method of Bringing Existing Documents Into the System .....	11
<b>V.</b>	<b>Common Misconceptions About Document Management.....</b>	<b>12</b>
A.	Your Existing Folders Do Not Disappear .....	12
B.	It Is Not Slower To Save A File .....	12
C.	It Is Not Slower to Open A File .....	12
D.	You Do Not Have To Enter The Same Information Over and Over.....	12
E.	It's Easy to Find a Subset of Documents Related to a Matter .....	12
F.	You Do Not Need To Know Any Client/Matter Numbers or Identification Codes to Find a Document .....	12

G.	Things Will Not Be Misfiled Because of Typing Errors .....	13
<b>VI.</b>	<b>Problems Solved with Document Management .....</b>	<b>13</b>
A.	Email Storage Limits Avoided.....	13
B.	Email Is Stored On The Server If It's in a DMS .....	13
C.	Email Is Stored in Single Database Everyone Can Access .....	13
D.	No Need For Multiple Distribution Copies .....	13
E.	Saving an Email Into the DMS Also Saves The Attachment .....	14
F.	Consistent File Naming and Folder Structure Handled Automatically.....	14
G.	The Electronic File Equals the Paper File .....	14
H.	Easily Track Incoming Documents.....	14
	1. U.S. Mail .....	14
	2. Email .....	14
	3. Faxes.....	15
I.	No More Storage on C:\ Drives or Private Folders .....	15
J.	Remote Access Is Standard Functionality with a DMS .....	15
K.	Documents Can Be Checked Out or Mirrored to Laptop Computers .....	15
L.	Easily Share Research and Templates.....	15
M.	Other Things You'll Be Able To Do.....	15
<b>VII.</b>	<b>Document Management Options I Recommend Considering .....</b>	<b>16</b>
A.	Worldox by World Software Corporation .....	16
B.	Autonomy WorkSite .....	16
C.	NetDocuments .....	16

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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