

Document Management Options for Small Firms

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Law Technology News
05-22-2006

Today, when we talk about documents we must include e-mail, faxes, electronically filed pleadings and spreadsheets -- as well as word processing files. And we are relieved to know that we can use computer software to organize e-documents as logically as we use file folders to organize paper.

Legal-specific document management software is designed to help you organize and manage documents. It can:

- Create a file folder structure, based on your configuration.
- Automatically file documents into that structure.
- Create a text index that makes document retrieval faster.
- Present lists of documents quickly.
- Create an assurance that you will be able to find documents and that none will be lost.
- Let you ask for documents in the way you think about them ("Bill wrote it last summer and it contained the word "bandsaw.") instead of wondering where the summer intern might have put the document.
- Eliminate the need to train new staff members on where to save documents.
- Provide easy migration to new servers (no more wondering if all of your documents arrived on your new computer).
- Provide portability when you are working on a laptop. (When you return to the server, the software knows where to put the documents you created or changed.)

SMALL FIRM OPTIONS

Document management software systems are often designed for large firms with IT departments that can manage the software. But small firms have options as well.

Let's look at two products that work well in the small law office -- but each has a different approach to managing those documents and other information. The products are Worldox, by World Software Corp., and LexisNexis Time Matters.

Worldox is document management software. With Worldox you establish the way you want documents to be saved (i.e. client/matter/type of document), install the software on each workstation, sit back and enjoy the ease of saving and retrieving documents. Worldox automatically knows to save word processing documents, spreadsheets, portable document files (PDF) and other file formats.

Worldox also allows you to save e-mail messages in the same way that you save the other document types. It has an indexing system for both the information about the document (its profile) and the text within the document. When you initiate a search of the documents in your computer system, the results produce all document types, regardless of where they are filed on the system.

With Worldox you can easily require users to save into Worldox but it allows the flexibility of seeing old documents the way you always viewed them.

Time Matters is practice management software. You establish an electronic methodology for the directory structure and as you hit the "TM Save" button on your Word, WordPerfect or Excel document, a Time Matters screen opens for you to complete and save the document.

This action provides a link between Time Matters and the documents. When you open the "Documents" tab on the Time Matters case screen, you see a list of all documents created for that case and, using the Timeline feature of Time Matters, you can see documents, e-mail, billing records, telephone call records, events and to do's in one place.

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However, there is no way to require users to save documents through Time Matters.

Other practice management software packages offer document management and offer links with Worldox. With some of those software packages the user must create the document, then go into the practice management software and link the documents to the matter record.

Because this is an additional step, performed after the document is saved, it is rarely performed consistently. The beauty of both Worldox and Time Matters is that the steps that you perform in the software are done instead of manual steps, not in addition to.

In some cases law offices decide that they want the benefit of both Worldox and Time Matters. Integration between the two products is elegant. When you save a document through Worldox, the entry automatically appears on the list of documents in Time Matters.

COST

For the price of the billable time lost searching for and recreating one document, you can pay for a license of either of these software packages. Both Worldox and Time Matters are sold by the number of users who are logged in and using the software. There is no minimum number of licenses. In addition, neither software package requires the use of a SQL (structured query language) database, so administration of the software is easy for most attorneys and support staff.

The current cost for a five-seat installation (five concurrent users): Worldox: \$395 per user (\$1975 for five) plus \$80 per license. Annual maintenance runs \$400. Time Matters: \$365 for the first user and \$200 for additional (\$1165 for five.) Premium technical support is available for \$950 per year.

Each of the products can be self-installed, but you can really pull your hair out if you try. A consultant to install either product and customize the document management tools will cost around \$3,000 for a five-person firm -- assuming that you do not want existing documents moved into the new file structure.

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