

Leveraging Technology to Manage Documents

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Speaking of Technology...

- Log on to www.amoslawblog.com
- Search for Leveraging Technology
- You will be able to follow along or download the material

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Considerations

- Area of law
- Number of users
- What you need from the system
- Training required and where to obtain

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Evaluation of Program

- Flexibility of the program
- Length of time to be up and running
- Who will customize the software
- Cost associated with that task
- Annual maintenance/upgrade/update cost

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Case Management / Contacts

- Needles
- PC Law
- Amicus
- Abacus
- ProLaw
- PracticeMaster
- PerfectLaw

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Document Management

- iManage
- Worldox

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“Selling” Everyone on the Automation

- Lower costs
 - Postage
 - Copies
- Easy access
 - Remote
 - No running around in search of file
- Efficiency

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Devil’s Advocate

- I don’t have any paper to go through?
- What about security?
- The computer often loses my data.

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Backup Solutions

- Off-site
 - Symantec
 - Storage Guardian
- On-site
 - Tape
 - External hard drive
 - Additional server
- On computer
 - Shadow copies

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How can I search for words in a PDF?

- Image v. Image on Text
- Document, Recognize Text
- Set option prior to scanning

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Hyperlinking

- Can be done in various programs
- Click [here](#) to go to the last slide

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Document Inventory

- Query
- Search terms
- Document name
- Matter name
- Matter number

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Vendor Selection

- All previously mentioned points
 - Area of law
 - Size of firm
 - What do you need from the system
 - Budget
- Reseller or Direct
- Check with any associations you/your firm may be a member of

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Negotiation

- Maintenance included?
- Add an extra year for free?
- Ask for what you want.

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Keeping up with the Joneses... or the Updates

Software is always being updated:

- Security
- Bug fixes
- User tools (increase efficiency)
- Compatibility

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Before updating

- Read the release notes
- Test environment
- Production on a few computers
- Let others be the guinea pigs

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Some useful websites

- www.ltnresourceguide.com
- www.abanet.org/tech/ltrc/
- www.law.com/tech
- www.alanet.org

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Digital Dictation and Speech Recognition

- Dragon Naturally Speaking
- Express Scribe

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Fax From Your Desktop

- RightFax
- MyFax
- eFax

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Other solutions

- iScrub - metadata scrubber
- Adobe Acrobat (tons of "hidden" tools)
- SplitView - simulates having two screens
- IntelliPDF - Adobe plugin - bookmark tools
- "Remove Hidden Data" - Microsoft download
- Postini - web filtering and email solutions
- Maxivista – use your laptop as a 2nd monitor

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