The Six Essential Document Management Features to Expect in Your Practice Management System

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Practice management systems are designed to organize information about your clients and your cases. A well-designed practice management system enables you to do to more than just manage your workload, plan your calendar, and bill your time. It can also help you gather customized data about your clients and cases, organize your calls, notes, and email — and manage all your documents.

That's right! You might not need to buy a dedicated document management system (DMS). The most advanced practice management systems contain features that enable you to create documents, save those documents to folders with specific names, and create profiles that link these documents to the applicable client/matter. This white paper discusses the six essential document management features your practice management system should offer.

> **A well-designed practice management system can help you manage all your documents.**

1. Save to Practice Management System

Whether you work in Word or WordPerfect, your practice management system should have a "button" that enables you to link a document to a specific case file with a single click. This macro style function should launch a "profile" wizard in which you choose the "case" or "contact" record to which this particular document should link.

The Save to Practice function should also be able to automatically create a folder by case name or contact name. By doing so, the practice management system manages the creation of folders so that you can easily find your documents within the DMS and through the Windows file system. Ideally, this wizard should also enable you to bill the time spent working on the document with another click so that when you add the document to the case file, you can capture the revenue for working on the document.

> **The DMS in your practice management system should enable a person to "check-out" a document while working on it, and "check-in" a document when they finish.**

2. Create From Practice Management System

You should have the ability to use data from your practice management system to generate a document. With this technology, merge the information from a particular case file or contact in your practice management system directly into the document. Whether the assembly engine is Word, WordPerfect, or HotDocs, the assembly ends with a macro that automatically saves the document to the appropriate folder and creates a profile.

3. Checkin/Checkout

One of the dangers of working without a document management system is that two people can simultaneously edit a document without the other realizing it. Depending on who saves last, that person's changes will take precedence. To prevent this scenario from happening, the DMS in your practice management system should enable a person to "checkout" a document while working on it, and "check-in" a document when they finish. While a document is checked-out, it cannot be used by another person unless they expressly override the check-out status.

4. Full-Text Indexing

The DMS "profile" is important for retrieving documents by case or contact and document name and type. Nevertheless, you may be looking for a document, but don't know how or where it was filed.

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In this case, full-text document search is particularly helpful. Thus, your practice management system should integrate with an indexing service available through your operating system (such as Microsoft Indexing Service) or include its own indexing service. And you should be able to launch a search directly from your practice management system or from the document itself.

> **By using the document profiles and the security and privacy settings on cases in your practice management system, you can restrict access to sensitive cases or documents.**

5. Email and Attachments

A wealth of information, including documents, arrives via email. You should be able to access your email from your practice management system. Also, you should be able to link your email directly to a case file. When a message includes attachments, these attachments should be "detached" from the email and added to your document list on the appropriate case file or contact record. The profile should retain a link to the original email. In so doing, you can keep track of all documents coming into or going out of your office.

6. Flexibility Versus Security and Privacy

Small firms often give everyone access to every document. But you may want to restrict access to certain documents. It is far better to let the practice management system serve as an intermediary to make sure that users select the appropriate file. By using the document profiles and the security and privacy settings on cases in your practice management system, you can restrict access to sensitive cases or documents.

Conclusion

The best practice management systems offer these DMS features at no extra charge. If you plan to purchase a practice management system, make sure it offers these key document management features. Your due diligence will be time well spent.

Seth Rowland, Esq. was named TechnoLawyer Consultant of the Year in 2002 for his contributions to TechnoLawyer on the subject of document assembly and law practice automation. He is a nationally known technologist whose company, Basha Systems LLC (www.bashasys.com), has helped many law firms build customized practice management and workflow solutions. Please feel free to visit his blog (www.bashasys.info) for the latest on document assembly and practice management.