

Choosing the Right Document Management Solution

DMS

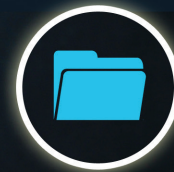
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ARRANGEMENTS



SOLUTIONS

SEARCHING DATA
OVERVIEW

SETTINGS



Management

SEARCHING DATA
OVERVIEW



Document Management is Important for Any Firm

Document Management Systems (DMS) often seems complex and daunting, however most law firms depend on a DMS to become more efficient, secure, and drive better business outcomes. All Covered has found many law firms stuck on old versions of a DMS or not even using DM. Other firms often don't understand or appreciate the benefits they can get from a full-fledged DMS. Even the name 'document management' leaves some confused, with questions like:

- **What's the difference between document management and content management?**
 - **Doesn't Microsoft Office already track revisions?**
 - **Can't we use Windows to search inside our documents?**
 - **Should we upgrade our current DMS? Or change to an entirely new solution?**
- And perhaps, most importantly:
- **We've seen dozens of Document Management tools in our search – for the right one for our firm?**

In this eBook, you will learn that, indeed, Document Management is important for any firm despite their practice areas, from a practice of one to a practice of 10,000+. We'll look into some of the biggest factors that contribute to a firm's choice of DMS software. Let's start by getting an understanding of the many benefits of a DMS.

Why Use a DMS?

Many firms out there are using legacy, outdated, or no longer sufficient systems or even still using paper filing, both of which are unproductive in comparison to current DM tools. Most current DM solutions in the market, including those All Covered works with and recommends, have complex, robust searching. If you're the technical type, some DMS systems use SQL to run complicated queries quickly and easily – or in laymans terms – a DMS will make searching through millions of pieces of content as easy as a simple Google search. With this in mind, it's no surprise that 80% of lawyers/firms are using a DMS system (ABA). But if your firm is in the 20% that's not using a DMS, consider it:

If this is your firm's first DMS, 'going paperless may be the most fiscally responsible decision you make your firm'.
(Missouri Bar Association)

"There are few businesses — regardless of size — that couldn't benefit from a document management system."
(Business News Daily)

This should at least have you asking questions – be it if your current DM solution is working for your firm, or be it whether you need something better than what your firm is currently utilizing.



How Much Content Do You Process on a Monthly Basis?

Some DMS can process a large number of documents more efficiently than others and require a separate server for indexing. You must consider if your firm is generating a lot of content daily, or whether your caseloads aren't generating that much relevant documentation, leaves some confused, with questions like:

Do you receive content from your clients? If so, there's a decent possibility some of this content will need to be imported into the document management system, and this can affect the choice of DMS tool.

The type of firm you run could also potentially affect content. If you're producing large size and/or large volumes of content due to the type of your practice areas, there are some DMS options that are better than others.

If you need to process large quantities of paper documents, you may want a DMS that integrates with an MFP.

If your firm works with a Records Management System, your choices may also be similarly limited.

Depending on which Records Management System you work within and the number of records you are storing, some DM solutions will simply be able to handle your workload better than others.





Do You Require an On-Premise Solution?

The ever-increasing popularity of the cloud comes as little surprise to those involved in technology. The advent and growth of the cloud have allowed for increased ease of use, access from anywhere, and reduced costs. This has spurred many DMS providers to start providing off-site solutions.

However, an increasing majority of firms can benefit from an off site/cloud based solution. Cloud servers allow firms to have access to their data when and where they need it. Aside from this, there are several other benefits as well. Average savings from utilizing a cloud-based DMS solution can be up to \$40 per user depending on your DM configurations and your firms needs. In larger firms, savings can quickly add up. Cloud solutions also assist in disaster recovery – a fire or other natural disaster can't affect cloud solutions.

"The benefits of the cloud model include reductions in reliance on IT staff and a significant reduction in the time and complexity to install and configure new software. The cloud model also reduces the need to purchase, maintain and back up expensive servers and other peripherals while providing remote access to users" [\(American Bar Association\)](#)



How Mobile is Your Firm?

In nearly every industry, the proliferation of smart devices has created the ability for employees to be increasingly mobile. Many knowledge workers spend hours each day on their smart phones and tablets. An increasing number of firms and attorneys require mobile access to everything from anywhere at anytime. Here are some statistics which should go to show that mobility may be a very large factor in your DMS decision:

77%

of lawyers report using their mobile devices for law related tasks
(ABA 2014 Legal Tech Survey)

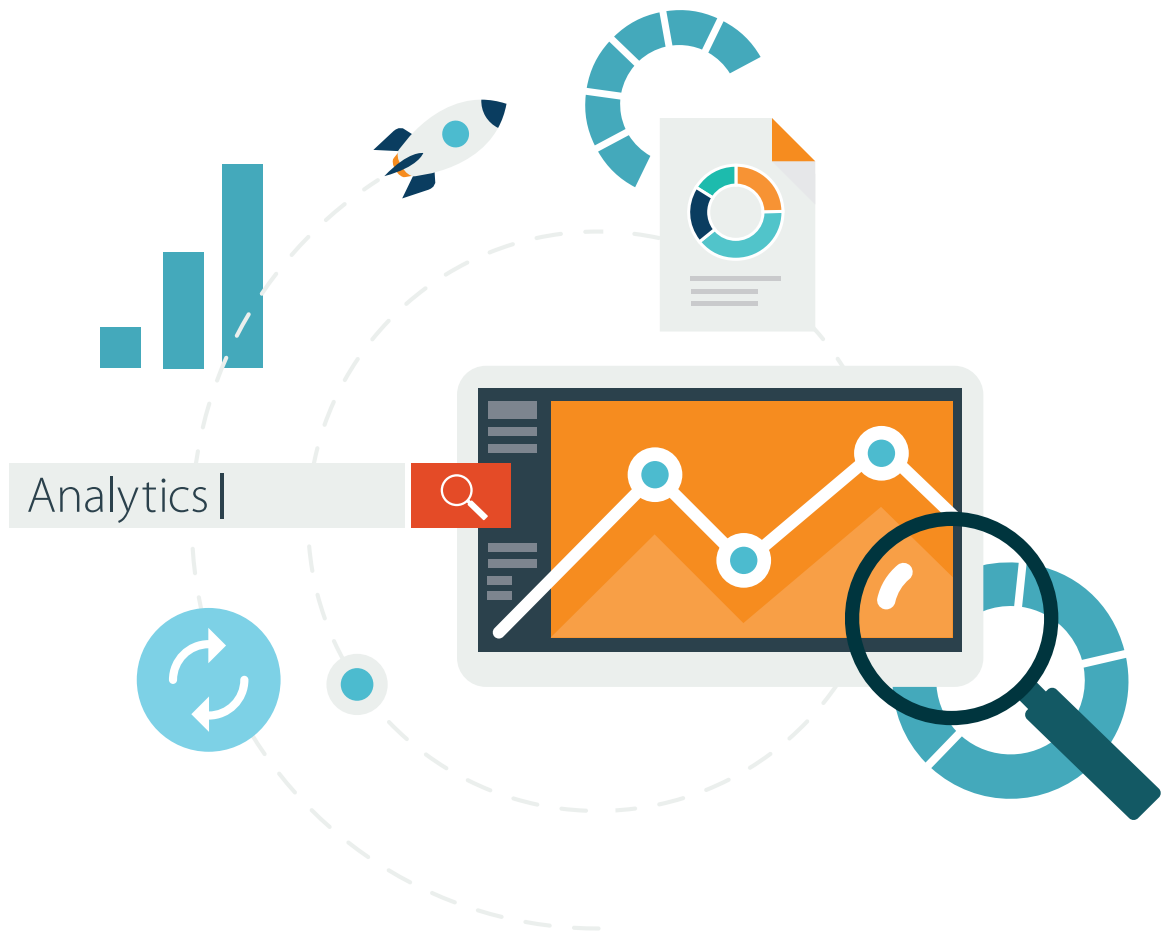
21%

of lawyers create documents on their mobile devices
(ABA 2014 Legal Tech Survey)

As more lawyers adopt mobile technology for legal tasks, more and more DMS's become extremely mobile friendly – and many firms must consider this as a factor in their decisions when considering a DMS. Three major DMS solutions - iManage, NetDocuments, and Worldox - all offer mobile applications to help firms manage their content while allowing employees to access their important content through their mobile devices.

However, the availability and performance of these mobility modules do fluctuate between different solutions; thus, knowing how important mobile use of your DM solution is will better allow you to make an informed decision.





Does Your Firm Have Specific Needs?

There are specific factors that can quickly narrow or limit the choices of DMS a firm has. And while there are countless quirks that can do so, let's take a look at a few:

Need to share files – the goal of DMS is to control and enable sharing within a firm; however, some firms have an additional need to share with clients or outside counsel.

Specific features – there are a number of specific features that only some DMS can offer, here a few that are important to consider:

- **Auto profiling** – DM solutions that auto profile are often desired by some firms due to the fact that they simplify storage and allow for detailed searches.
- **Matter centrality** – What quickly became a methodology utilized by increasing numbers of DM solutions has now become something many law firms seek out. Matter centrality allows for a consistent workflow between people, processes and numerous applications within a firm.
- **Application integrations** – Some firms will need some custom integrations of their DM solution to other applications they use, and some DM's will work to integrate more smoothly than others.
- **Auto Naming** – file naming conventions can vastly vary from user to user. Instead of trying to force an implanted file naming policy, some DMS will do this automatically.

- **Customizable Interfaces and workflows** – Many firms need interfaces or workflows specific to their organization or their needs. Some DMS allow for more customization than others, and this can be a determining factor. If you need your DMS to integrate with other software, such as your practice management or time and billing solutions, this too can be done easier with some DMS solutions more than others.

If you're upgrading from an older DMS or file storage solution, you may need a specific solution that will handle this properly.

"If... you'll be integrating old files with the new system, you may need..." a very specific solution. ([Missouri Bar Association](#))

What Is Your Budget?

A simple fact of most businesses, especially law firms, is that the bottom line matters. And while some law firms have little to no issue with large capital expenditures, other firms may have needs to minimize expense as much as possible. Some DMS solutions require a much larger initial investment than others. And some DMS solutions are designed or intended for use in firms of various sizes.

"The document management software commonly used by the legal profession includes Worldox, [iManage], and OpenText... Of these, Worldox is by far the most appropriate for a smaller office environment, [as] it provides concurrent licensing (concurrent licenses are shared by all users of the system, in contrast to individually licensed software requiring each user to have a license.) An alternative option is NetDocuments... [which] is priced per user [lower than most other DMS]."
(American Bar Association)



Help With Making the Right Choice

Making a switch to a new DMS or obtaining a DMS for any firm can still be a challenging task. Even with all the different factors that can contribute to determining which solution is ideal for a firm, the decision is still often not an easy one.

All Covered has over 20 years of experience supporting law firms with technology, including DMS solutions. We provide resale, integration, and support of some of the most vetted and respected DMS tools, including Worldox, iManage, and NetDocuments. All Covered also provides integration and support for OpenText. Our years of legal IT

experience have made us experts in document management and finding the right solution for firms of any size. All Covered has a dedicated legal DMS team and legal help desk that supports DMS and other leading legal applications. If you have any questions, please feel free to contact us.

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