



ALTERNATIVE TO DOCUMENT MANAGEMENT SOFTWARE

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I speak and write frequently about knowledge management. It's a concept I feel must be kept at the forefront of law practice management. Definitions of knowledge management abound, and most are fairly incomprehensible. I define it simply as the development of the governance and organizational structure necessary to nurture the people and systems that create, preserve, disseminate, protect, renew and deploy knowledge, and leverage it to the benefit of the organization and its clients. If I had to boil this definition down to its essence, I would sum it up as "don't reinvent the wheel."

Working smarter instead of harder is often about knowing what you already know, and being able to put your hands on it quickly. It's about protecting what you know— your firm's intellectual property—so it is not given away or lost. It's about training people to properly use the systems which provide, index and protect your firm's IP. All this, and more, plays into effective knowledge management.

Not only does this affect your own firm, and that of your colleagues, but it affects your clients as well. The whole issue of records management has become exceedingly complex with the advent of electronic discovery. Spoliation and adverse consequences can result from sloppy or ineffective records management. So in the face of potential litigation, effective knowledge management, which includes records management as a subset, can be critical. Hopefully this fact alone will be sufficient to get it on your radar screen. This is in addition, of course, to the benefits to be had on the productivity side.

As our electronic environment becomes exceedingly complex, finding information quickly, efficiently, and without missing anything essential becomes more and more difficult. Our information is becoming increasingly "cubby-holed" in various software packages, in a format which is not easily accessible from a central location. Take as a typical example, the need to search for everything concerning a particular client. This search might involve the following steps:

1. go into document management (if it's installed) or windows explorer and search for the client name, number, and/or folder, depending on where we're looking, to find documents.
2. depending on what we have indexed in our document management (assume we have it) we may have to separately go into other programs such as PowerPoint, Access, Excel etc to find additional documents related to the client.
3. go into email and search for any saved emails either in the inbox or sent items folder or a client subfolder.
4. go into the file to search for faxes and other documents received, along with notes and other "flotsam and jetsam" associated with the file.

You see where I'm going with this. Time consuming at best, and easy to miss things. And then the "hits" you find upon searching typically do not have a "view" button, so you must open most items to find out if it is what you are seeking.

Some of the larger firms have invested in image management software, which can convert virtually anything to a PDF or TIF format, so that it can be indexed and retrieved with the same ease as provided by document management. Image management can even be integrated into the document management system. I have seen some very impressive image management systems. But, unfortunately, they are pricey, and still out of reach for the average firm.

Many of you have made some real strides in the "paperless" direction, by receiving as many faxes and documents electronically as possible, so that the paper file becomes irrelevant when performing such a search. That's a start.

Wouldn't it be simply wonderful if you could use a search engine like Google, to search for anything on your system, regardless of format? And wouldn't it be even more incredible if that information were viewable? Well, we're just about there, folks. What we're talking about are Desktop Search Tools. Right now there are a bunch released in early and beta versions. Many software developers are racing to the finish line because the potential for this tool is incredible.

As a Google search engine fan, I decided to first test the Google Desktop Search Engine, which is in beta. It operates on Windows XP and 2000 SP3 or above. I downloaded the free software, and in minutes I was up and running. It activates from a button in the system tray on the task bar. It operates within Windows Internet Explorer, but instead of searching the world wide web, it searches your hard drive for MS Word, Excel, PowerPoint, Text and AOL IM. It



was fast, but the results were displayed the same as in Google, lots of links with just the first line or two as a hint of what lurked behind. The actual “finding” required constant clicking on links to open documents and other items to see whether it was “relevant” to what I was seeking. And once I opened the document, I had to peruse much more than I wanted just to find out why it was on the search results list. Frankly, the sheer number of “hits” was overwhelming, and I found a huge number to be lacking in relevance, even at the beginning of the listing of search results. Also, the fact that it did not search my Outlook was disappointing, as a wealth of information is contained in folders within my inbox.

I next tried X1 and Copernic. Their trial versions are free, but X1 must be ultimately purchased. After a week of testing both, which are highly similar, I let the trial of X1 expire and stayed with Copernic. It operates on Windows 98/ME/NT/2000/XP. Again, a very quick download had it up and running. It puts the search box on the task bar, as well as an icon in the system tray on the task bar. I elected to save the space on the task bar by eliminating the search box, and activating it only from the system tray. Its search capabilities are more extensive than Google’s. It will search MS products, as well as WordPerfect, Adobe PDF, HTML, XML and ASCII and more.

Like any of the Desktop Search Tools, Copernic creates an index of all of your documents. What amazed me was that upon entering a search term, it started to display results before I finished typing the word. It has a number of ways to group the results, the default display being from newest to oldest. It’s easy to change defaults. There were a number of very significant advantages to using the Copernic tool. First, it found emails and PDFs in addition to everything else. It even searched attachments to emails. Second, it has a viewer, which seems to work with just about every document type, although there were a few I encountered which were not viewable.

A simple click on the document in the search result screen provides a preview below (split screen mode) which has the search term *highlighted* wherever it appears. This is much more useful in determining the actual relevance, and saves time opening and laboriously searching through documents. I performed all of the same searches I had performed in Google, and the results in Copernic were much more accurate and helpful.

Another thing I like about Copernic is that the results are stored on your hard drive. If you don’t have time to track all the results down, you can reopen it later, and it will still have your last search and results displayed.

The obvious question is whether such a tool can search across network drives. That would make it much more valuable. I could not determine the answer by



looking at the comparison matrix offered by Goebel Group (www.goebelgroup.com/sam.htm), which right now is about one of the best resource listings of Desktop Search Tools. Another excellent reference is *The Desktop Search Handbook* published by Woody's Office Watch, and available at <http://shop.woodyswatch.com/dsh/> for \$14.95.

I posed the question on the ABA listserv LawTech. With thanks to Eric Schnauffer, Esq. of Evanston, IL, I believe I have an answer. Some of the desktop search engine tools, including Copernic, can be set up to search content from a file server. Filehand and Thunderstone and Vivisimo are others which can access content on a file server. I should mention that I tried Filehand a while back and disliked it so much I uninstalled it a mere 48 hours after the original installation. You may feel differently.

This new software, the Desktop Search Tool, has the potential to assist firms of all sizes, but especially the solo to mid-sized firms, in quickly and easily locating information on your computer or network, regardless of where it resides or in what format. Keep this on your radar screen folks. It's one of the best new developments in quite a long time. I predict it will play an important role in assisting firms in the knowledge management area.

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