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September 28, 2005

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### Using Time Matters for Knowledge Management (Brief Bank)

DATE: 10/21/2002

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TYPE: Post

TOPIC(S): Case Management/Docketing; Collaboration/Knowledge Management

>TechnoLawyer member Eric Mathisen asks: "Our firm has kept  
>a "brief bank" on 3 x 5 index cards for the past 20 years.  
>The cards act as a database which then identifies the brief  
>or memo which is stored in a file cabinet. Well, we are  
>finally moving into the 21st century. It is our plan to set  
>up a database (with a Microsoft or Corel database program)  
>using the same fields we have on the 3 x 5 cards. We will  
>have the actual brief or memo scanned in & saved in  
>PaperPort & in archive file on the file server. The  
>database would identify the correct document along with its  
>location.

>"Based on recent posts, do you think the DMS contained  
>within Time Matters 4.0 would offer a viable alternative? I  
>have a hard time thinking about the matter/case structure  
>of Time Matters could be used for a database like our brief  
>bank. I need to have the search capabilities of the brief  
>database to be easy & straightforward or there will be  
>resistance from the less techno-savvy members of our firm."

As a disclaimer, I am a certified Time Matters consultant. Time Matters does have document management capabilities through its Document List. Documents can be profiled along several criteria. They can be "related" to both Matters and individual Contacts (or clients). The document list profile form has a limited number of fields that can be customized. However, if each document is to be associated with a Matter, you can store the matter details in the matter form. It is quite likely that a home can be found for the fields in either the document form or the matter form. I would need to know what fields were on your 3 X 5 cards to know for sure.

As for document searching capabilities, Time Matters supports mass import of files into the document profiling area and a powerful text-search engine. The catch is "text-search." From your schema of printed files in file cabinets, you appear to be importing images. Until you O.C.R. the images into text files, there will be no effective text search capability. Some PaperPort versions come with TextBridge O.C.R. engine. You may want to look into OmniPage Pro.

Regardless of the approach, you will have a conversion job ahead of you. This is the order of tasks I would undertake:

1. Set up Time Matters for new briefs as they are written and entered.
2. Bring in the card file data so you can quickly find items in your file cabinet brief bank more effectively.
3. Scan the briefs and link them to the document profiles
4. OCR the scanned images and replace the links to the images (or just make a duplicate

of the image profiles and link it to the text version.

Good luck.

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*Community Manager's Notes*

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