



Is Your DM Locked Down or Opt-In?

#ECMPG6

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William Grady

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Thank you for being here today

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Speaker and Firm Profiles



Name	Atty/Emp	Offices	SQL / DMS	Versions	Hosted
David Bustle	151/ 325	4	1 SQL 4 DMS	<ul style="list-style-type: none"> • Worksite Server 9 -SP1 Update 2 • iManage WCS FileSite 9 -Update 3 (90.3.11) • FileSite 9 -Update 3 	No
Marshall Major	35 / 85	3	1 SQL 1 DMS	<ul style="list-style-type: none"> • Communications server - 8.5 sp2 update 2 • Worksite Server - 8.5 sp1 Update 9 	No
William Grady	43 / 83	1	No DMS	<ul style="list-style-type: none"> • No Version -Shopping for a DMS 	NetDocs or iManage Worksite

Overview



- Do you allow users to save outside of your DMS?
- Is your DMS Security Optimistic or Pessimistic?
- Offline/Mobile Access
- Folder Structure
- Tools

Do you allow users to save outside of your DMS?



- Large Files – Video and Audio
- Large Cases
- Local 'Save As'
- What your Attorneys are really doing?
- What is Staff doing?
- Sharing files with clients

Is your DMS Security Optimistic or Pessimistic?



- What does Optimistic mean?
- What does Pessimistic mean?
- File system rights
- Exceptions
- Word processors, Billing clerks

Offline/Mobile Access



- Malpractice
- Local 'Save As'
- Exporting Data

Folder Structure



Base Folders for all matters

- Bates Numbering
- Check Requests
- Correspondence
- Directory
- Faxes
- Memos
- Misc.
- New Case Form and Intake Form (read-only)
- Pleadings
- Research
- Vault

Tools



RBRO Solutions (www.rbrosolutions.com)

- Link2DMS – Controls 'Save As' to DMS in iManage
- EasyFolders – Allows users to create root level DMS folders in iManage

IntApp (www.intapp.com)

- Wallbuilder – Ethical Wall system

Questions

We'll now open it up for questions

Thank You

