

# Organized At Last

## Atlas File Notes Organizer 3

### Atlas Solutions

(310) 827-4475 (forwards to UK support line)  
www.filenotes.com

Price: \$79 for single-user, Professional edition;  
\$249 for five users. Check Web site for other  
pricing options and discounts.  
Windows 98/Me/2000/XP

Reviewed by Grace Suarez, a sole practitioner  
and knowledge management consultant  
based in San Francisco.

Atlas File Notes Organizer 3 (FNO3) is an integrated file manager and file notes catalog. It uses a Windows Explorer-type interface with extra columns to add notes to the files. This allows you to create what is in effect a document management system without the need to import files into a database.

The company included a tutorial titled "The Lawyer's Filing System, Using Atlas File Notes Organizer 3." I decided to apply its ideas to my own solo appellate practice.

I keep my client files in a subfolder entitled "Clients" (original, huh?). Under this subfolder are folders for every client, each with other folders titled "Correspondence," "Appeal documents," and so forth. The company's suggestion is to add a folder called "000Today." I scanned all the day's incoming documents into that folder, using ScanSoft's PaperPort. I then ran FNO3 and added notes to each document. In a fully staffed office, this task could be performed by a receptionist or secretary.

The note fields are completely customizable, so I could set up columns to store the information I wanted to capture about each document. I also could select which columns I wanted to view. The column views can be saved, so I could have different column views for different types of document groups.

I then moved the documents to their respective folders. In a networked office, this step could be performed by a

paralegal, or by the attorneys themselves. It's the digital equivalent of picking up your mail.

Once the documents are in their folders, they can be viewed in the viewer pane. Double-clicking on the document icon opens the document in the software program that created it. Even though in the beta version I could only view documents scanned in PaperPort format (the final version will have other image viewers provided by Outside-In), I could open any type of document, as long as I had the software that created it.

### File Detection and Prompting

I set up the program to monitor files in particular folders (in my case, it was the "My Documents" folder) and to prompt me to add notes when saving a newly created or edited document. This meant I didn't have to run FNO3 to add notes to a document — I could do it from my word processor or scanning program.

### Document Collections

With the "Collections" feature, I dragged shortcuts to documents in different folders into one "pseudo" folder. I gathered all the briefs from each case file, and all the research on a particular subject, which would otherwise have been scattered through several client folders.

### Annotating Multiple Documents

Using the "Flood Fill" feature, I added keywords to groups of files. This is very useful when dealing with a lot of documents that will have the same keyword, such as a client's name.

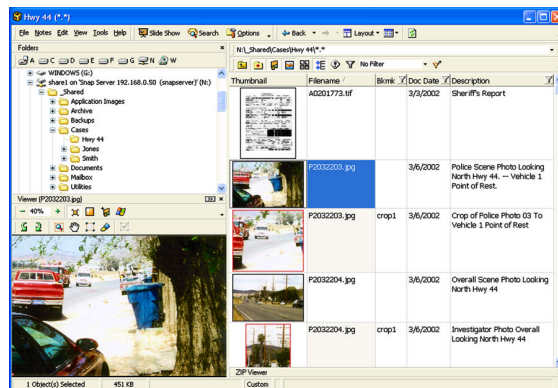
### CD-ROM Catalogs

I created catalogs of my CD-ROMs and used the "Flood Fill" feature to add

notes. Now I can search for any archived file without having to go through all my CDs. Once I locate the file, I can put in the correct CD-ROM.

### Bookmarks

The "Bookmarks" feature allowed me to write multiple notes in a file, which expands the limit of four note fields per file. Bookmarks can be written to the document itself, or to portions of it. For example, I selected a page in a respon-



FNO3 is an integrated file manager and file notes catalog.

dent's brief that contained a particular argument, and created a bookmark. Using FNO3, I could then jump straight to that page by clicking on the bookmark note.

### Support

The company is located in England, but they have set up a telephone number in the United States, which forwards to its technical support line in England. The company also has a fine User Forum and other information on the Web site. I looked at some of the questions and answers, and it seems the company is very good about providing solutions to problems. I liked the specialized "Lawyer's Filing System" tutorial I was sent. There are even special tips for lawyers on the Web site. E:1

### Closing Argument

**Pros:** This is one of the easiest programs to learn and use that I have encountered in a long time.

**Cons:** The only thing missing is the file viewer for documents other than those created in PaperPort. The company said the full viewer will be included in the final version.

**Verdict:** I strongly recommend this product. If you have been thinking about going "paperless" and creating a DMS, you would do well to look at this elegant and inexpensive solution.

## Review Policy

Reviews are conducted by practicing attorneys and other legal professionals using the actual products on their systems. Vendors are NEVER allowed access to reviews before publication. If you are a vendor with a program you would like reviewed, please send a full working copy (i.e., no crippled features, shut-off dates, etc.) plus any press materials to Attn: Short Reviews, LAW OFFICE COMPUTING, 3505 Cadillac Ave., Suite H, Costa Mesa, CA 92626. Reviewers are selected by the magazine. Programs will not be returned.