

Review: FileCenter Pro Plus 7

By Roy Greenberg

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FileCenter Pro Plus 7

www.lucion.com

TechnoScore: 4.5

1 = Lowest Possible Score;
5 = Highest Possible Score

A lawyer is to a document as an actor is to a stage. It's the vehicle through which you perform. But what if you can't get to the theater (find a document on which you need to work)? Actors have understudies. You don't. A document management system can help you prevent show stoppers. In this TechnoFeature, Hamptons real estate lawyer Roy Greenberg reviews Lucion's FileCenter Pro Plus 7, a desktop document management system designed to help law offices become paperless. Roy thoroughly evaluated its features — automated document management, search, optical character recognition, PDF file creation, Outlook, scanner, and other integrations, and more. How well does FileCenter Pro Plus work. Read Roy's in-depth review to find out.

INTRODUCTION

Lucion Technologies's FileCenter Pro Plus is promoted as simplified paperless office software. Lucion offers three versions — Standard (\$49.95), Pro (\$179.95) and Pro Plus (\$199.95). I used the Pro Plus version for this review (hereinafter FileCenter). The software

was designed by attorneys for attorneys and shows it plus the company has a history of listening carefully to user feedback. Version7 once again incorporates such feedback — well, mine at least.

The opening screen looks like our old friend, the file cabinet. The left-hand panel contains "drawers" functioning much like their physical counterparts. Within each drawer, you can create Windows folders. One drawer per matter works best. Other panels show your folders, your files in those folders, and a window to preview files before opening.

You can use FileCenter to achieve the mythical paperless law office. Any successful paperless strategy must be both easy to use and adaptable to your habits. These are FileCenter's greatest strengths.

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MANAGING FILES

Assume that we're working on the Smith file. Every document that I save in any program will be placed in the Smith folder in its native format. So FileCenter

places all my Smith letters, spreadsheets, and PDF documents in one place. When I ask my word processor to open a file, only the Smith files are presented as choices. If I scan a document with my much-loved Fujitsu ScanSnap, the PDF scan goes into the Smith file. No extra steps are needed to place the letter in the right file, nor any conversion to a proprietary format. Since FileCenter works its magic with negligible user input, you can quickly integrate it into your daily routine.

Most readers know how to change the default file folder in a program so that all of your documents are saved to the same location. But there's no practical way to repeatedly change every programs' default file as you switch matters throughout your day.

FileCenter's genius is a background process that interrupts the open and save functions of your other programs. You can add or exclude programs from FileCenter's process interception on a permanent or occasional basis. When I'm finished with the Smith folder, I open the Jones folder. From that point, all of my programs look to the Jones folder for opening and saving files.

I ran the program on my aging Pentium 2.8 GHz running Windows XP Professional with 4 MB of memory. FileCenter worked perfectly with the many pro-

grams on my PC. As a bonus, FileCenter even integrates with Web-based Gmail.

FileCenter enables you to create as many client and matter subfolders as you like. In my realty practice, I have subfolders for the full contracts that I send out, the contract's components, and contract revisions from counsel. Since I can create subfolders as needed, I can tailor them for each matter if need be. A complicated contract is more manageable if each major revision resides in its own subfolder, and even sub-subfolders. Once you create the perfect setup, you can store it as a template for future use.

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Create as many cabinets as you like to group files by practice area or other criteria. Special advanced cabinets enable you to assemble file subgroups that link to your existing cabinets. I have an advanced cabinet for those files that I expect to focus on for the day. Thus, the Smith folder appears in both my main cabinet and in my subgroup where it's easy to find.

Since the cabinet drawers are nothing more than Windows folders, you can switch from a file cabinet view to Windows Explorer view with one click.

Better yet, you can split the screen view between your cabinets and the Windows Explorer interface. This setup makes it simple to drag and drop files into matter-specific drawers instead of wrestling with import/export features. A split screen view also triggers the automatic file-renaming feature. First you establish naming rules accessed through a drop down menu. Your file-naming pattern consists of some combination of the original file name, the date and the drawer name. When you drag and drop the file, use the drop down menu to rename it to meet your firm's guidelines.

My favorite feature is the ability to drag and drop e-mail attachments into client files. I leave FileCenter open in the left-most portion of my 24-inch monitor. Amicus Attorney stays open in the right-most portion. Everything else is in the middle. This arrangement lets me drag email attachments into FileCenter as needed. Regrettably, the automatic renaming option is not available when dragging e-mail attachments. I'd like that option in a future release.

FileCenter can also integrate with Microsoft Outlook to keep your email and documents in one location. I didn't play with this feature because I'm happy with my present Outlook file organization based on [QuickFile](#). But readers not already wedded to an email solution should take a look.

FINDING FILES

Once your Smith folder contains materials in different document formats, how do you quickly

find what you want? Use FileCenter's preview window to view hundreds of formats. You can expand the size of the preview window to the width of the document, which is great when you don't own the originating program. Use the same feature to print documents. The preview window has one drawback. When in use, you can't save your work on that file unless you first close the preview window. Until I understood this limitation, I was puzzled when unable to save files.

FileCenter contains an OCR function to convert scanned files to text. You also have the option of sending the recognized text directly to Microsoft Word.

What if you can't even remember where to look for your document? Use FileCenter's search function. The search feature will index any of your cabinets on a daily basis. Your searches can use Boolean logic or plain English, with common date and name options. FileCenter's documentation says that the program can also use many existing search engines, but I found FileCenter's own search technology satisfactory.

Of course, indexing won't help unless your documents contain text. FileCenter contains an OCR function to convert scanned files to text. You also have the option of sending the recognized text directly to Mi-

Microsoft Word. So you can convert many email attachments to editable documents. You may find the program's OCR technology a satisfactory substitute for a dedicated OCR program, thus saving you money.

FileCenter also offers tools for working with files. Without leaving FileCenter, you can email files (all in their original formats), zip them to reduce their size, encrypt them, or convert them to PDF files. You can also manipulate PDF files with a set of limited options that may be adequate for law firms that don't want to buy [Adobe Acrobat Professional](#).

In a future version, I'd like FileCenter to show which files are not text and require optical character recognition to become searchable. FileCenter can perform OCR on every document while scanning, but that slows and may even stop your scanner. Most users will instead opt for faster scans. At day's end, you may not remember to run OCR on your latest scans. So some

sort of visual reminder in your file listings would be a great aid. Or maybe an option to run optical character recognition overnight.

I'd also like to see a slightly more sophisticated search function for finding the correct drawer. If I type "Smith" into the drawer search window, FileCenter shows me the first of several Smith drawers. If I want to see a different Smith drawer, I'd like to be able to search for "Smith" and any other party's name. Currently, the only option is to search for the drawer name exactly as written. Did you name the drawer "Smith vs. Jones" or "Smith w/ Jones?" Such immaterial distinctions should not make a difference, but they do.

GETTING HELP

I particularly appreciated that FileCenter's options enable me to configure the program to reflect my workflow. The help files include a set of "best practices" for program setup. FileCenter's flexibility should make your move from physical files to electronic file easy.

The program's well-designed Web site contains video demonstrations of most program features. I can't imagine anyone using all of the program's features and shortcuts, but you should have no problem finding satisfactory options. Better still, all of the features were either where I expected them or easy to find. I rarely needed to check the manual after installation. When I wasn't sure how to perform a function, a right click of my mouse usually brought up a menu giving me the choice that I wanted.

CONCLUSION

Before FileCenter, I struggled to build a paperless office around both [PaperPort](#) and Acrobat. FileCenter is a superior paperless product that rates a TechnoScore of 4.5. If you're not satisfied with your filing system, you should find the program well worth a look. You can download the program for a 30 day trial. Since the cabinet folders are only Windows folders, you can later uninstall the program without affecting any of your work.

Roy Greenberg represents clients buying, selling, building, and leasing real estate in East Hampton, New York. Intelligent use of technology enables him to represent clients from across the country and overseas.

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