

TECHNOLOGY PROJECT INVENTORY

PART I. LAW FIRM PERSONNEL INFORMATION Date: _____

	NAME First MI Last	INITIALS ABC	E-mail flast@firmlaw.com		Technology Enthusiasm: Strong / Good / Mild / Low Comments
Firm					
Lawyer					Strong / Good / Mild / Low
Main Practice Areas:					
Specific Tech Needs:					
Lawyer					Strong / Good / Mild / Low
Main Practice Areas:					
Specific Tech Needs:					
Lawyer					Strong / Good / Mild / Low
Main Practice Areas:					
Specific Tech Needs:					
Lawyer					Strong / Good / Mild / Low
Main Practice Areas:					
Specific Tech Needs:					
Bookkeeper / Billing Person					Strong / Good / Mild / Low
Assistant works with:					Strong / Good / Mild / Low
Assistant works with:					Strong / Good / Mild / Low
Assistant works with:					Strong / Good / Mild / Low
Assistant works with:					Strong / Good / Mild / Low
Other: functions:					Strong / Good / Mild / Low

PART II. LAW FIRM TECHNOLOGY INFORMATION

1. Use this list as an aid to identifying areas where the firm may need to make changes.
2. You do not need to fill in every box. Focus on the areas you see as most important.
3. Put question marks ??? by areas you are not sure about and want to discuss.

Potential Needs	Current Systems Software name & version # or Manual or N/A (not applicable)	Priority: A B C or N/A Comments:
DATA & DOCUMENTS Main Word Processor:	<input type="checkbox"/> MS Word Version: _____ <input type="checkbox"/> WordPerfect Version: _____	
Word processor upgrade? (Switch to MS Word?)		A B C or N/A
Calendar control		A B C or N/A
Client and contact mgmt		A B C or N/A
Case and matter mgmt		A B C or N/A
Document assembly		A B C or N/A
Document management		A B C or N/A
Document scanning		A B C or N/A
Other document software		A B C or N/A
ADMINISTRATION		
Timekeeping		A B C or N/A
Billing		A B C or N/A
Accounting		A B C or N/A
COMMUNICATIONS		
Shared phonebook		A B C or N/A
Phone system		A B C or N/A
Voicemail		A B C or N/A
Fax, Fax modem, E-mail-to-Fax		A B C or N/A

Potential Needs	Current Systems Software name & version # or Manual or N/A (not applicable)	Priority: A B C or N/A Comments:
INTERNET SERVICES		
Internet access from all desks?		A B C or N/A
Internet Acceptable Use Policy in place?		A B C or N/A
Remote access to calendar, contacts, case information from home or on the road?		A B C or N/A
Law firm Web site? How often updated?		A B C or N/A
E-mail, secure e-mail		A B C or N/A
E-mail mailing lists		A B C or N/A
Document transfer		A B C or N/A
Web browser software	[] MS Internet Explorer – Version: ____ Last updated: _____	A B C or N/A
SECURITY		
Tape backup: How often does it run? How often is a test restore run?		A B C or N/A
Mirrored network hard drive		A B C or N/A
Internet backup of key files?		A B C or N/A
Off-site backup? How frequent?		A B C or N/A
Antivirus software: How many days between updates?		A B C or N/A
Internet firewall: Last updated:		A B C or N/A
Intrusion detection software:		A B C or N/A
Document hidden information remover?		A B C or N/A

Potential Needs	Current Systems Name & version #	Priority: A B C or N/A Comments:
LEGAL RESEARCH		
Books		
CDs		
Online resources		
PERSONAL COMPUTERS		
MS Windows version and # of PCs	Win95 PCs:____ Win98 PCs____ WinME:____ Win2000:____ WinXP:____	
How much RAM on PCs?		
What processors? Chip and Speed		
NETWORK		
Network operating system Name and version	<input type="checkbox"/> Windows, <input type="checkbox"/> Windows Small Bus. Server, <input type="checkbox"/> Novell Version:_____	
Server hard drive Size and Free Space		
Server RAM		
Server processor		
Network server brand		
Network switch or hub?		
Wireless network?		

PRACTICE-SPECIFIC SOFTWARE	Current Systems Name & version #	Priority: A B C or N/A Comments:

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