

International Law Firm Relies on OpenText™ to Manage and Protect Firm Content for Almost Two Decades

Davies enables vital knowledge sharing with OpenText™ Document Management, eDOCS Edition

With approximately 240 lawyers at offices in Toronto, Montreal, and New York, Davies Ward Phillips & Vineberg LLP is focused on business law and is consistently at the heart of the largest and most complex commercial and financial matters on behalf of its clients, regardless of borders. Recognized as a market leader in each of its core practice areas, Davies clients are from a wide range of leading industrial and commercial companies and financial institutions, both public and private, in Canada, the United States, and abroad.

Davies has relied on OpenText™ Document Management, eDOCS Edition (eDOCS DM), and its predecessors to manage firm documents for almost two decades. The eDOCS DM platform provides the law firm with centralized matter-centric repositories from which lawyers across the different practice groups can access and share work documents. “When it comes to document production, it’s a firm-wide system. We have approximately 650 users,” says Ivaylo Nikolov, Director of IT at Davies Ward Phillips & Vineberg in Toronto. All employees at Davies use the system to capture, organize, locate, and share information in a secure, integrated, and intuitive environment.

Integrated Systems Support Law Firm’s Business Practices

As with most firms, the file opening process is a complex undertaking that requires coordinated input from numerous departments. There are varying levels of review and approval and interaction with multiple business applications and procedures. At Davies, the client/matter intake process essentially consists of a few different integrated systems, with eDOCS DM providing the unified enterprise knowledge base for easy access and retrieval of their key information assets.

INDUSTRY

Legal

CUSTOMER

Davies Ward Phillips & Vineberg LLP

CHALLENGES

- Enhance worker productivity and collaboration
- Required a unified enterprise knowledge base for easy access and retrieval of work product
- Simplified search and document control

SOLUTION

- OpenText™ Document Management, eDOCS Edition

BENEFITS

- Protected repository for easy retrieval and audit response
- Efficient document control and collaboration
- Team-driven, client-focused service

“We rely on OpenText to make sure that our content is safe and secure, first and foremost, and then easily accessible.”

IVAYLO NIKOLOV, DIRECTOR OF IT AT DAVIES WARD PHILLIPS & VINEBERG LLP

The automated process follows specific rules and triggers the minute the matter is created. As Nikolov explains, “A new file is first created in our time and billing software system. Next, the conflict check is initiated, using our conflicts checking system.” Davies uses Integration Builder by Intapp™ to connect and manage the different software applications. Integration Builder monitors the accounting system and picks up the client/matter information and propagates it to all the other client management systems, including eDOCS DM. “It’s fully integrated across all offices and we are able to automate a variety of critical business processes,” he says.

eDOCS DM is also fully integrated with the Microsoft® Office suite, providing a highly intuitive environment for document management. Users are accustomed to a standard eDOCS ribbon from within Microsoft Office applications, providing quick access to commonly used tasks. The eDOCS ribbon has a presence at the menu level and is featured prominently in Outlook. Users can add their documents directly into eDOCS and later search and retrieve them back into their Microsoft Office suite application.

“The ability to share, secure, and attach documents from within whatever application they are working in—that’s another excellent example of integration,” says Nikolov.

For document capture and delivery, Davies relies on Omtool® AccuRoute®. The AccuRoute document process automation platform communicates information from a scanner to various destinations and recipients simultaneously. “Employees can scan to their desktop, their inbox, or directly into the eDOCS repository,” explains Nikolov. “This is automated to the point where you can go to the scanner, punch in your user ID, and it identifies who you are and what matter you usually scan to. If your matters are changing all the time because you’re a busy lawyer or a busy assistant to a lawyer, the system will keep track of and present the most recently used matters. It is also possible to create an eDOCS cover page for repetitive scans. Depending on how you create the cover page, it will take the scanned job, OCR it, and deliver it to the eDOCS repository, create a profile, and save it.”

Another tool fully integrated with eDOCS is a federated search program called Decisiv™ Search from Reconnind® that allows Davies employees to quickly and easily prioritize and rank their search results for increased productivity. “Think of it as a data portal;

we call ours ExploreDavies. You click on it, and it takes you to a screen where there are several tabs for people, matters, documents, library, and record books. An email tab will be added soon. It’s a Google-like, full-text search,” explains Nikolov. Also included are all four eDOCS repositories: the Toronto, Montreal, and New York libraries that together contain over five-and-a-half-million documents, plus a precedent library in Toronto called Legal Resources that contains between 60,000 and 80,000 precedent documents.

Enhance Knowledge Worker Productivity and Collaboration

Every lawyer and legal assistant at Davies uses OpenText eDOCS DM. “People don’t use anything else. It’s their universe. When it comes to content created by the professionals at the law firm, all of it ends up in the document management system. And after 20 years, I can say that there’s no system out there, at any firm, that has a higher adoption rate than the document management system,” Nikolov says.

Centralized Document Management

eDOCS DM increases productivity by enabling faster access to content. Effective document control and collaboration is critical, according to Nikolov. “Sharing of information is paramount to the success of any law firm. Lawyers collaborate. The DM system lends itself perfectly because everyone saves their work in the same repository. It is the same experience for everyone. We have standard document types, standard industries, standard practice areas, etcetera.”

Security Controls

Law firms sometimes must restrict internal access to client information if faced with conflicts with past or current clients, or if they are engaged in multi-party representations. Davies credits being able to segregate confidential content as a major benefit provided by the OpenText DM system in combination with the Intapp solution—Wall Builder. “Oftentimes we have groups of professionals working on highly confidential deals, so being able to create ethical walls is paramount to the success of the business. When a lawyer does a search of the DM system, if a matter is for their eyes only, they are the only ones who will see it and vice versa,” Nikolov says.

Improved Client Service

Staying competitive and providing clients with the best legal advice possible, in the time and manner they dictate, has long been the standard in the legal sector. “At the end of the day, everything we do centers around client service, quick turnaround, and efficiencies. Our content is our intellectual capital and eDOCS DM is basically the container for managing all of this capital,” Nikolov explains. “We rely on OpenText to make sure that our content is safe and secure, first and foremost, and then easily accessible. When you think about it, the DM system is one of the original systems that introduced efficiencies 20 years ago. We were right 20 years ago and today it’s truer than ever. Twenty years only proves that the product has staying power...today it’s even more stable and all-encompassing. You don’t get the same benefits with many other systems.”

A Solid Foundation

Nikolov expects to continue working with OpenText to achieve his content management goals. He notes, “Whenever we need something, we ask. We are always met with understanding and an open discussion. We’re happy with OpenText and that’s where we’re staying.”



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