

# Success Story

## Balch & Bingham, LLP Represents Client Matter with Open Text Document Management™

Open Text Document Management, eDOCS Edition™, sets the record straight—into a centralized, secure, accessible location

Balch & Bingham is a corporate law firm that provides a business-first perspective to clients—from individuals, to blue-chip corporations, to government organizations. Having begun 80 years ago in the Birmingham, Alabama office of Judge William Logan Martin, Balch & Bingham has expanded exponentially throughout its history, particularly in the past two decades. Mergers and organic growth have taken the firm to six offices across the United States and an employee count eclipsing 500, including over 250 attorneys that serve a broad range of practice areas.

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*Rhonda Lewis, Senior Systems Application Analyst,  
Balch & Bingham, LLP*

files on individual network drives. In 2008, Balch & Bingham decided to convert all of their offices to the latest version of the Open Text DM system to take advantage of the comprehensive set of standard functionalities it provides—including advanced search functionality and email integration. With email becoming an ever-increasing means of doing business, and the requirement to give lawyers access to the same set of documents, the need for an integrated system across the firm was critical to the business-first ideology of this professional establishment.

Rhonda Lewis, Senior Systems Application Analyst at Balch & Bingham, explains their need for an integrated solution: “Every office, and sometimes the practice groups within those offices, had their own group that would secure almost everything. That was challenging because, depending on the service account or the set up, it was difficult to make the system seamless for users to profile new documents. We needed a streamlined system that allowed employees from different offices to profile new documents, add security, and manage and store email. Also, we needed to be able to easily scan in hardcopy bulk items and import the documents into a secure document repository for the right user or group access. We do a lot of scanning and imaging.”

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### Industry

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### Business Challenges

- Importing and integrating client matter into a central, electronic location
- Retention of client matter
- Document turnaround time
- Information security and traceability
- Risk management

### Business Solution

- Open Text Document Management, powered by eDOCS

### Business Benefits

- Unification of client matter
- Significant reduction in search and turnaround time for documents
- Enhanced risk management with instant access to the most recent information and security controls
- Improved information sharing and consistency
- User-secure and user-traceable information

For Balch & Bingham, Open Text Document Management, eDOCS Edition, was a proven solution that met all of their needs. Lewis explains, “We found that if you have a situation where you manage documents, or run reports, or you have a database administration, there are DM vendors in the marketplace that are definitely not for you because they do not let you touch any of those things. However, with Open Text DM, we have access to create reports, perform a major cleanup from the back end, and use the native utilities to have more control over issues like data replication. In other words, we can do a lot with the Open Text software without calling in technical specialists to do things for us.”

### Sustained, secured matter centricity with seamless integration

The law firm is currently working to get all the offices up to date so that the entire firm will run on, and benefit from, the same version. “We have already installed the DM servers and we are in the process of getting the DM client deployed in each office so that we are all running on the same system. We’re using DM Extensions in Outlook and employees can drag and drop email, and everything to do with a matter, into one folder in the document repository. We love the way that we are now able to attach multiple documents with DM to emails. It makes sharing a little bit smoother and we appreciate that,” says Lewis. “Now that we are getting all of the offices on the same level, we are going to introduce Dynamic Views to those without it, to show them how to create workspaces, folders, and so on.”

Open Text introduced Dynamic Views™ as an add-on to DM Extensions. The feature allows users to further customize their navigation tree, tailoring views to their working habits. It creates an easy-to-use tree view that is based on profile information, where documents can be filtered based on specific data. A view consists of hierarchal levels that are similar to the standard client and matter situation in a legal library. The levels include client matter and document types. Email can be dragged and dropped onto a dynamic view node with the profile and security information inherited. Outbound email can be easily saved to a dynamic view node by selecting *File & Send* and navigating the tree. Security can be set on any level and inherited by the documents or emails that are saved to that level (matter-centric security). Balch & Bingham’s entire system is consolidated into one, centralized system, with customizable desktop views so that individual employees may organize information to their liking.

Balch & Bingham has also implemented a secure Web Extranet system, using Microsoft® SharePoint®, that clients can access to view their documents. “Our litigation group has a few of these sites, especially those who deal with mergers and acquisitions. The information is saved in the Open Text document repository and exported to SharePoint, which is used as the access point for clients to retrieve documents. If a client requests changes to a document the attorney will go back and correct it, then publish it back to the extranet site so the client can view it. The extranet is secured and read-only, so only those with permissions can alter the documents,” explains Lewis.

### Consecutive benefits with Open Text DM

According to Lewis, substantial benefits come from Open Text’s employment of a consistent, reliable, traceable, and secure knowledge repository. “The biggest benefit for Balch & Bingham is to be able to see all the activity and all the documents for a particular client matter, as well as the people involved. From a management standpoint, if someone leaves the firm, we have a historical presence in the system where we can see the activity and can tell if documents were being copied or sent off premises, for instance. When lawyers leave the law firm, all of the information is retained in one, easy-to-search location. If the lawyer is taking clients with them, it’s easy to get a list of documents for those particular client matters. Once we have the release from the client, we can export those files for the attorney to take. On the flip side, if there’s an attorney joining the firm and bringing in new clients, it’s easy to import and manage when we have client matter set up for their documents.”

“In addition, being able to track information so easily helps if, for example, someone is filling in for a secretary and they need information on client matter but do not know where it is. In this case, they can actually search for recently added data, find everything to the point where he or she left off, and be able to continue the work for the attorney. To me, that consistency is excellent. Another great advantage is having our forms and documents available for people to search based on a document type, so that they may build new documents with an existing foundation. I think that’s a huge benefit too,” says Lewis.

Open Text DM facilitates a more efficient means of information sharing, with residual benefits for Balch & Bingham clients. “Once a document is in the system, the clients are going to have a quicker turnaround on their documents with better consistency and accuracy,” adds Lewis.

Open Text Document Management is becoming more and more important at the firm. “If someone has to find a document from a particular law group, for instance, that deals with a certain ruling or law that is a few years old, having the ability to crawl the network and find all related documents is a huge benefit. Not only can we find the document, but we are able to realize all of the details of that client matter and everything related to it. Situations like this do come up, especially in certain practices, like corporate, where you’re dealing with mergers and acquisitions—in all aspects of the business world,” says Lewis.

### An appeal for more Open Text solutions

Apart from rolling out Open Text DM and Dynamic Views firm-wide, Balch & Bingham are considering other Open Text systems, such as LegalKEY® for its Records Management (RM) system. “Operations on the management side of the business see the need for RM, and they have told me that they are going to use my expertise in evaluating and deploying a solution, probably within the next two years, so it’s coming. Mainly, we want to drive retention policy so that we can easily move files to the next step and have the space available to store what we need,” says Lewis.

Lewis is also interested in *Open Text Content Lifecycle Management Services for Microsoft® SharePoint®, eDOCS Edition™*. With this solution, the firm will be able to develop comprehensive compliance solutions governing electronic content, including email, file systems, and other record-generating environments, while ensuring litigation readiness and supporting e-discovery processes.



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