

Success Story

Davies Ward Phillips & Vineberg LLP Deploys Open Text Technologies to Improve Access to Content Across the Firm

eDOCS™ DM and RedDot Content Management Server Enable Vital Knowledge Sharing

With more than 245 lawyers at offices in Toronto, Montreal and New York, as well as an affiliate in Paris, Davies Ward Phillips & Vineberg LLP practices business law nationally and internationally for a wide range of leading industrial and commercial companies and financial institutions, both public and

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*Ivaylo Nikolov,
Director of IT at*

Davies Ward Phillips & Vineberg in Toronto.

private. Its clients include corporations, governments, regulatory bodies, charitable organizations, international agencies, educational institutions, individuals and trusts and estates. Davies has been ranked as the foremost corporate law firm in Canada in each of the Toronto and Montreal markets.

Davies has been using document management software from Open Text since 1996. In 2005, the firm decided to upgrade to the multi-tiered architecture of eDOCS DM to take advantage of the comprehensive set of standard functionality it provides—including advanced search functionality and email integration.

With the upgrade of its DM system, the IT team took this opportunity to conduct a complete refresh of the desktops firm wide, synchronizing the roll-out of the new DM system with a desktop rebuild.

“We started preparing for the upgrade six to nine months in advance because in a law firm, the document management system is one of the three most important applications these days, if not the most important piece of the puzzle,” says Ivaylo Nikolov, Director of IT at Davies Ward Phillips & Vineberg LLP in Toronto. “With an upgrade of such a major component of our applications, it was the perfect time to also go through a full refresh of our desktops.”

According to Nikolov, it was imperative that users could be converted to the new system gradually and without interrupting the workflow. “Because we are a transaction-oriented firm, lawyers from different practice groups and different specialties must come together to do deals, which means that they need to access the same set(s) of documents. So the ability to have users on the old and the new system work together, while the conversion was in progress, proved to be invaluable to us.”

Firm Wide Roll-Out

After several months of extensive planning and testing—including a pilot project involving 30 users that tested not only DM, but the other system upgrades, eDOCS was rolled out live to approximately 750 users across all three offices. All the users went on a training course to get up to speed not only on eDOCS DM, but also on other new applications like Microsoft Office 2003. “The DM training included explaining the integration with Outlook and how to access the DM repository from within the Outlook interface. Users can do their content searches without ever having to leave Outlook,” says Nikolov.

Industry

Legal

Customer



Business Challenges

- Upgrade existing document management system to coincide with a desktop rebuild and ensure a smooth transition without any down time.
- Enable firm wide access to share information between all groups and offices.
- Install a Web content management system that would provide the firm with hands-on publishing without requiring support from the IT department.

Business Solutions

- Open Text eDOCS™ DM
- RedDot Content Management Server (CMS)

Business Benefits

- Intuitive and user-friendly interface eases user acceptance and administrative operations.
- Enables efficient collaboration and information sharing between different practice groups across the firm.
- Web Content Management system allows the marketing department to take ownership of their area of responsibility, enabling the IT team to concentrate on higher level projects.

*Trust the Content
Experts... we do!*

Today, all employees at Davies are using eDOCS. Approximately two million documents are stored in the system.

The eDOCS document management platform provides the firm with centralized matter-centric repositories from which lawyers across the different practice groups can access and share internal documents, including emails and attachments. Each of the three offices has their own library and Toronto has two libraries—the main library that contains over one million documents, and a secondary ‘legal resources library’ that contains between 60,000 and 80,000 precedent documents. “The idea is that the offices are independent in terms of connectivity, but when it comes to document production, it’s a firm-wide system,” says Nikolov.

Integrated Systems Support Law Firms’ Business Practices

Users are able to capture, organize, locate and share information in a secure, integrated, and intuitive environment. Nikolov describes the client/matter intake process, which he says essentially consists of a few separate systems that are mostly integrated. The automated process follows specific rules and triggers the minute the matter is created. “A new file first gets created in our time and billing system, which includes a records management module. Then the accounting module gets populated. From there, we use an integration appliance to propagate the information about the client and matter into all the other systems including eDOCS DM. This includes interaction with all the other client management systems. It’s fully integrated across the board, in all three offices,” says Nikolov.

When it comes to the integration between DM and other systems, Nikolov says the biggest impact he has seen is the integration with Outlook. “We have had the ability to save a document, an attachment or an email message from within Outlook for 10 years now ... just a right click and then ‘Save As’ into DM as opposed to locally or anywhere else. Then with the upgrade to eDOCS, we have the full integration where the Open Text DM folder appears in the left-hand side of Outlook just like any other folder, with sub-folders underneath ... the full functionality from within Outlook, which quite a few people have taken to, especially lawyers who traditionally have always used the DM client as their “go to” place to find documents.”

Nikolov says the feedback has generally been great. The lawyers like the fact that they can find information quickly. It gives them greater functionality and the ability to share documents is huge. “The ability to share documents, the ability to secure documents, and the ability to attach them if you will from within whatever application they are working in—that’s another excellent example of integration. They can email documents back and forth from within eDOCS DM, so they love it,” says Nikolov.

On the Horizon

For the future, Davies is considering moving from their homegrown intranet to using Microsoft SharePoint® for their intranet portal to deliver integrated business systems to the user community—including the time and billing, records management and eDOCS DM systems.

The Davies team is also considering some of the other components in the Open Text legal suite, including LegalKEY® Records Management. “We are trying to streamline the file opening process so LegalKEY Records Management will be something that we will have to look at seriously very soon.”

RedDot for Web Content Management

Law firms typically design external Web sites as an information source and a marketing tool, which is certainly the case at Davies. Visitors to



the site can read about the strengths of the firm, the practice areas it specializes in, view lawyers’ bios, and find out about associate and student programs.

In 2004, the responsibility for creating, editing and publishing content to the firm’s external Web site moved to the marketing department at Davies. It was at that time the firm upgraded its Web content management solution to RedDot CMS from Open Text’s Web solutions group, primarily because of its ease of use and intuitive software interface. Davies has been able to meet all of its Web content management requirements with RedDot.

Prior to implementing RedDot CMS, the firm relied on a team of technical staff to update content on their Web site and outsourced the management of the Web server. Davies wanted a Web site that non-technical staff could adopt and master quickly, and reduce the level of IT support.

“With RedDot, our users do not need to be Web masters to use the application. The tools and interfaces are familiar to the marketing staff, so they do not need to learn sophisticated editing tools to maintain Web content. We felt that RedDot CMS was much easier to use than the majority of the other systems we looked at. Since the people in marketing are solely responsible for adding content and editing the site, it was important that we were able to empower them with the tools to get it done. It’s not really an IT job any more,” explains Nikolov.

Since deploying RedDot CMS, Davies has realized several benefits that have impacted their business in a positive manner. For example, prior

to the implementation, a third party used to host the Web server, but now, the firm no longer outsources the solution, which has resulted in savings for the law firm in terms of time and production costs for the Web site.

“The other positive result is that we do not need to have a professional Web master,” adds Nikolov. “User training is simple. There are no technical requirements. The ease of use of the application was crucial for us.”

Open Text Technologies – Improved Access to Content across the Firm

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