



Success story

Evans & Dixon LLC

Industry

- Legal

Solutions

- OpenText™ Document Management, eDOCS Edition (eDOCS DM)
- OpenText™ Guardian for eDOCS by Wertheim
- OpenText™ Wireless DMS for eDOCS
- OpenText™ Email Filing, eDOCS Edition

Partner support

- ADV

Results



Instantaneous search results



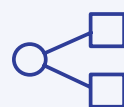
Secure, accessible files for enhanced productivity and customer service



Complete/holistic view into client or matter



Anytime, anywhere access to the eDOCS library



Streamlined collaboration and sharing

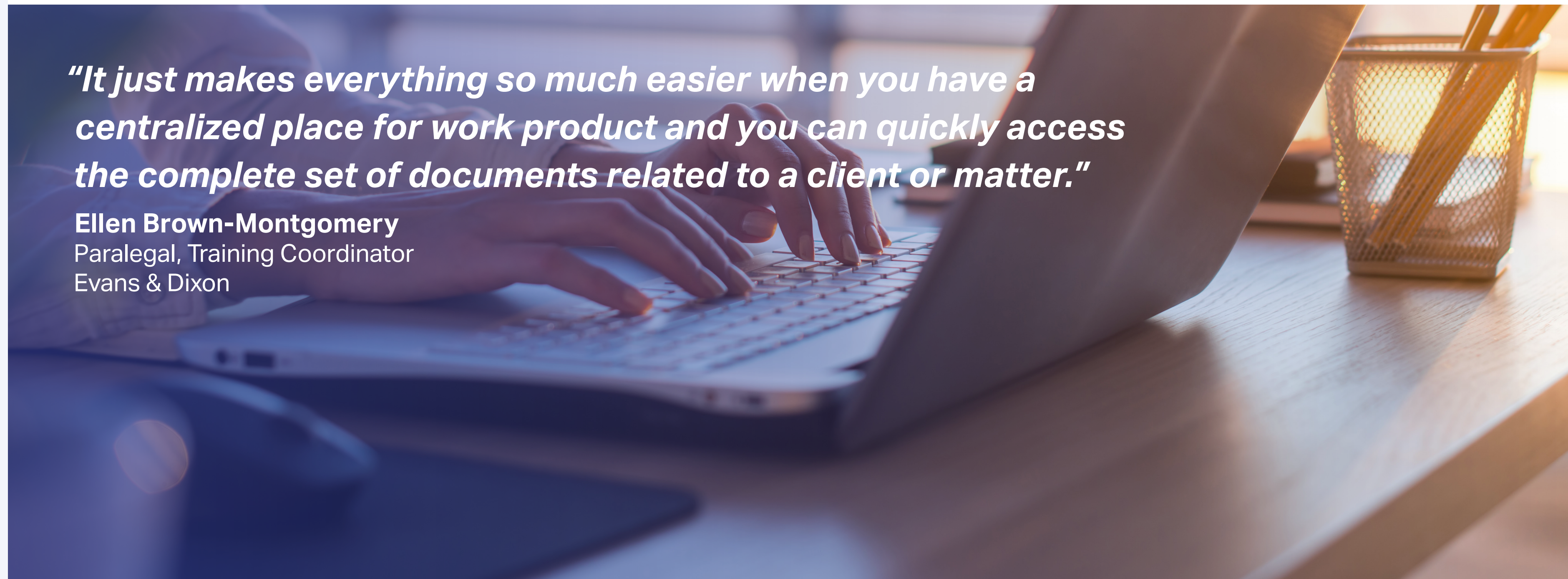


Evans & Dixon relies on OpenText™ eDOCS to scale and grow operations

U.S. Midwest law firm relies on OpenText eDOCS for secure, efficient management of work product

"It just makes everything so much easier when you have a centralized place for work product and you can quickly access the complete set of documents related to a client or matter."

Ellen Brown-Montgomery
Paralegal, Training Coordinator
Evans & Dixon



Legal firms prize and protect files. “Our documents: they’re our ‘crown jewels,’” says Jeff Sheldon, CIO for Evans & Dixon, a limited liability company (LLC) based in St. Louis, Missouri. Since 1946, the full-service law firm has delivered legal counsel for businesses in the areas of corporate, environmental, intellectual property, healthcare and more.

Protecting and managing work product—from documents to emails—is a top priority; however, maintaining secure and convenient access to files can be challenging, especially during periods of expansion. Due to normal growth as well as acquisitions, within a ten-year period Evans & Dixon doubled in size, increasing from three to six offices.

To support this growth, the law firm needed a reliable information management system for its attorneys and professionals. Unfortunately, its previous methods were in dire need of an update, according to Sheldon. **“It was like they were stuck in the early ‘90s,”** he recalls, an assessment particularly concerning when Sheldon joined the firm in 2008.

Managing more than 1.8 million files at the time, the firm used servers and software that were out of their prime by several years. Slow, cumbersome searches hindered case work; crashes could bring it to a standstill. A lack of security triggered concern and duplicates abounded. **“We wanted to get an effective solution for managing our work product,”** Sheldon relates.

Rapid deployment, long-term relevancy

Working on a tight timetable, the IT team conducted research, interviewed vendors, and observed four solutions in action. eDOCS stood out for its speed of searching, flexible, standards-based design and deployment turnaround. **“OpenText did everything we needed,”** Sheldon explains.

OpenText flexibility also proved to be indispensable. **“It’s easy to manipulate and integrate with our other legal systems,”** Sheldon says, **“I’m glad we went with OpenText because it could support a lot. We didn’t know we were going to need all that flexibility, but we made the right choice.”**

Rapid deployment and integration

Evans & Dixon worked with ADV, an OpenText partner based in Minneapolis, to deploy OpenText™ Document Management, eDOCS Edition (eDOCS DM) at the firm’s offices and quickly bring users online. As the platform module for OpenText eDOCS Suite, eDOCS DM was deployed as the centralized library for the firm’s collective work product.

Although many of the firms that Evans & Dixon acquired over the years used other document systems, Sheldon describes easy integration powered by eDOCS DM. **“Because it uses SQL, it’s pretty easy. For instance, following one acquisition we needed to import 40,000 files. The next day, everything was in there, indexed and ready to go.”**

Over the years, eDOCS DM has proven efficient at communicating with ProLaw®, law firm business management software, IBM® iSeries and other systems used at legal organizations. Sheldon’s team built simple SQL queries that link information in ProLaw to the information in eDOCS DM. Searching is faster with eDOCS at the backend, while they maintain familiar practice management functionality within ProLaw.

Integrations with eDOCS DM, their accounting system, ProLaw and Copitrak also streamlined efforts. **“I couldn’t imagine having separate systems and having to do triple work,”** Sheldon says. **“You put the file in one place, and within a few minutes everybody has the new information. It makes my life easier and it just works.”**

“Attorneys used to take home big suitcases on wheels. Now, it’s all in the palm of their hands, on their phones or tablets. It just makes it easier.”

Jeff Sheldon
CIO
Evans & Dixon



Growing with the firm

eDOCS is now used by close to 185 professionals at Evans & Dixon, including 80 attorneys and more than 100 paralegals and support staff. The repository continues to grow, and today it contains over 2.5 million documents.

After almost a decade, eDOCS continues to return benefits to the growing team at Evans & Dixon.

Amplified productivity, collaboration

“With eDOCS, searches are practically instantaneous,” Sheldon notes. ***“Less than a second. It’s just a world of difference.”*** Ellen Brown-Montgomery, a paralegal and the training coordinator for Evans & Dixon agrees, ***“Users can enter a simple term and find what they’re looking for, rather than paging through files. It just makes everyone’s job so much simpler.”***

When files are needed at court, support staff members use hyperlinks; with one click, attorneys access the documents. All users are trained to share references rather than emailing files, ensuring the use of a single, up-to-date product rather than scattered duplicates.

Improved organization, security

Working with OpenText partner Matrix Logic, Evans & Dixon streamlined document types according to the area of law. For instance, professionals serving the Collections law practice only see the content related to Collections.

Furthermore, paperless tracking adds security for documents that go through multiple hands and versions, according to Brown-Montgomery:

“One of the nice things about eDOCS is that you can pull up that history, you can see who’s made these changes. You can see who took this document, where it was copied and where it is now,” she says. ***“You get to see the whole lifecycle of the document.”***

Enhanced client service

Secure, immediate access to work product empowers Evans & Dixon paralegals and staff members to deliver content to attorneys, thereby enhancing the service they provide to clients. ***“It just makes everything so much easier when you have a centralized place for work product and you can quickly access the complete set of documents related to client or matter,”*** Brown-Montgomery says.

Extending the platform with additional modules

Added technologies further enhance mobility, convenience and security for eDOCS users at Evans & Dixon.

OpenText™ Wireless DMS for eDOCS allows users to access files in their eDOCS library at any time from mobile devices. They can then fax or email retrieved files. ***“Attorneys used to take home big suitcases on wheels,”*** Sheldon says. ***“Now, it’s all in the palm of their hands, on their phones or tablets. It just makes it easier.”***

OpenText™ Guardian for eDOCS by Wertheim was added to protect the firms ‘crown jewels’ from internal security breaches. Guardian monitors the use of the eDOCS library, reporting any excessive user activities—those that exceed established thresholds. ***“It’s like having a burglar alarm,”*** Sheldon notes. ***“I’m happy to say we haven’t had any breaches ... it’s one of those things you hope you never have to use, but you’re glad you have it.”***

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Ellen Brown-Montgomery
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Latest advancements for streamlined use

Next up for Evans & Dixon is an upgrade to the latest version of eDOCS DM for new and refined functionality.

InfoCenter—the dashboard interface will allow users to select and surface important or frequently used information up front and center in this tiled, customizable view—so it is rapidly accessible. Sheldon describes the new interface as “cleaner, simpler,” especially for attorneys who are working more often from mobile devices. He feels the user-friendly experience will increase user adoption and productivity.

Sync and save—bi-directional synchronization between a user’s local drive and a folder or workspace in eDOCS DM ensures material is available on the attorney’s desktop while, at the same time, automatically secured in the eDOCS library. It also ensures co-workers maintain access to needed files regardless of whether staff members are in the office or on-the-go.

OpenText™ Core™—secure cloud sharing will enhance collaboration among Evans & Dixon professionals and external contacts. Current transmission of thousands of huge files—JPEGs, raw data, spreadsheets—are not protected within third-party cloud products.

“It’s haphazard at best,” Brown-Montgomery notes. ***“I’m looking forward to having a place where we can collaborate with clients securely and seamlessly.”***

OpenText™ Email Filing, eDOCS Edition will boost the percentage of emails filed within eDOCS—especially among attorneys—with automated filing based on metadata from previously saved emails and an Email Marker that visually identifies which emails have been uploaded into in the eDOCS library. ***“That’s less clicks and a lot less typing than before,”*** Sheldon notes. ***“Our users will like it—it’s simpler and it makes you more connected.”***

Valued partnership

Relying on OpenText, Evans & Dixon has gained a secure, flexible solution for managing their client information, coupled with personalized attention and support. ***“You’ve got the best of both worlds,”*** Sheldon says. ***“You’ve got a big company that’s doing a lot of research and development, a lot of investment, but you’re not so siloed that you can’t talk to the higher ups.”*** He finishes: ***“OpenText puts the customer first, which is the way it’s supposed to be.”***

About ADV

ADV expertly enables governance and skillfully solves content management conundrums. With inventive technology and wise counsel, ADV maximizes the success of productivity and security projects, eliciting confidence from all stakeholders.

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About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit opentext.com.

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