

Law office of Harris and Rives centralized Document Management, Complies with Regulatory Governance

Lawyers Access Information Faster, Collaborate Easier and all Legal

Law office of Harris and Rives had client contents spread in multiple repositories, namely Lotus Notes, and File Share. Enterprise Content Management initiative was aimed to consolidate the contents on SharePoint 2013. The vision was to ensure contents can be accessed easily and implements regulatory compliance requirements guaranteed and documented content disposal.

The Situation

Law firm needed to upgrade and improve the document management system and organize the existing Client/Matter Portal. The attorneys and paralegal staff were looking to quickly locate critical documents. Their concerns were of two fold, namely, finding newly created documents easily and also to find existing documents of active and past matters dispersed in file system. The firm also wants to reduce paper usage by 60 percent over three years and reduce dependency on physical file storage. Approximately 1.7 million pages of paper documents stored in cabinets must be digitized.

"SharePoint was chosen platform to improve team collaboration, document management, and implement regulatory compliance. PageLight provided Email Management capability on SharePoint with direct integration with Outlook"

"Client Matter centric collaboration Portal for Legal DMS"

"PageLight has made it easier for our legal teams to work with SharePoint and helped the adoption of SharePoint email management"

Client was lacking a structured way to manage Email records. During the course of an active client matter proceeding the legal team would send cc' to everyone and also to Public Folder. When the case was closed, case specific emails were moved public folders once again and team members would also leave copy in their Inbox, 'to be on safe side'. There was no way to declare an Email as a record and subject to retention policies.

Group also goes through a compliance process with each new Client and as well as Client-Matter. This may include validation of necessary documentation like contracts, background information, accounting information, and terms of service. Ethical guidelines have to be reviewed like excluding a group of Attorneys for new clients because of clash of interests.

The Solution

Office 365 and PageLight was chosen to provide the collaborative Portal. Sai Innovations 'SharePoint consulting practice started with Information Architecture workshops to identify the Information Lifecycle Management policies of different types of contents. ECM roadmap was developed, which outlined the solution features available along the project time line

1. Client Matter Template

Support staff can create a new Client-Matter portal site from a site template. Site templates were configured with Content Types, Document libraries and other

Lookups. Workflow to support the approval business process was available immediately and only must be configured to suit the case requirements

2. Content Analysis and Migration

Migration service analyzed the contents in File share and existing paper documents. PageLight migrated the contents and tagged automatically as the documents were filed in SharePoint. Paper documents were scanned and metadata automatically extracted before moving the digital copies to SharePoint

3. Email Integration

PageLight was added to SharePoint deployment for Outlook integration. When a legal team is added to a new Client Matter, the corresponding SharePoint site will be automatically added to their Outlook folders. Users can easily drag-and-drop emails and attachments from their inbox directly into the SharePoint email folders. Email properties, such as To, From, Subject, and Received, are captured as metadata when the emails are moved to SharePoint

The Results

- Implementation of enterprise content management strategy, with guaranteed disposal policies applied on all contents
- Reduce risk and liability by improving regulatory compliance
- Self-creation of Client Matter SharePoint site without IT involvement
- Integration with LOB applications during tagging process
- Increased adoption of SharePoint as Email management system
- Drag-and-drop of emails and attachments to SharePoint by Legal team. Automatic capture of email attributes as content metadata. Email can be retrieved during eDiscovery initiatives



About SAI Innovations

SAI Innovations provides business technology services for Enterprise Content Management and CRM consulting. SAI specializes in Microsoft SharePoint and Dynamics CRM technologies to develop Cloud or On-premises solutions. Companies can achieve regulatory compliance and reduce risk with use of PageLight, our award winning Document Management solution for SharePoint.

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