

# Lewis Rice Supports Industry Excellence with OpenText™ Document Management

Law firm provides efficient, reliable service to clients with OpenText eDOCS Solution

Lewis Rice is accustomed to requests for document management recommendations from its clients; they want the same efficiency and reliability—based, in part, on OpenText™ Document Management, eDOCS Edition—that gives the law firm its reputation for service excellence.

Facing an explosion of information within an environment of regulatory and business pressures, Lewis Rice—a national law firm based in the Midwestern United States—prioritizes technology that enables productivity. “The job of a law firm is to practice law. You do that as efficiently as possible on the behalf of the client,” says Paul Obernuefemann, Chief Information Officer for Lewis Rice.

Lewis Rice has relied on OpenText Document Management, eDOCS Edition (eDOCS DM) and its predecessors since the 1990s, to manage and secure the firm’s content. Today, eDOCS DM productivity is status quo for the commitment to excellence at Lewis Rice. “eDOCS is the most trusted platform we have,” Obernuefemann says.

## Ensuring a ‘Single Source of the Truth’ for Matter Data

Handling technology for about 130 attorneys and another 140 support personnel, Obernuefemann testifies to the importance of document management when operating in the legal environment. The absence of a reliable, centralized document management system is untenable, he says. “Your service to the clients would be downgraded substantially without the ability to version documents and control who is accessing what document at what time.”

Attorneys also need the ‘truth,’ as it applies in the document management setting. “We don’t want the document we worked on yesterday or last week,” Obernuefemann says. “We want the document everybody is working on today.”

Lewis Rice attorneys also recognize the need for secure, reliable storage organized by matter. All Lewis Rice attorneys and dozens of support staff use eDOCS DM daily to create, organize and manage data by client matter. “With eDOCS, we’re able to provide quality service to our users and our clients; everybody is on the same page and we’re

## INDUSTRY

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*Legal*

## CUSTOMER

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*Lewis Rice LLC*

## CHALLENGES

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- *Ensure information flows securely*
- *Able to find current versions of files and track document access*
- *Firm productivity and customer satisfaction*

## SOLUTIONS

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- *OpenText™ Document Management, eDOCS edition*
- *OpenText™ Email Filing, eDOCS Edition*
- *OpenText™ eDOCS DM Extensions for Microsoft® SharePoint®*

## BENEFITS

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- *Central email and document management supports efficient matter-centric operations*
- *Fast, easy access improves attorney productivity, enhances client service*
- *Version reliability maintains consistency*

**“eDOCS DM enables our users to work faster, which of course means they’re providing the clients with faster service.”**

PAUL OBERNUEFEMANN, CIO, LEWIS RICE

WATCH THE VIDEO\*



*\*To play this video, you will need to have Adobe® Acrobat® version 9 or higher installed and a live internet connection.*

able to share data back and forth easily, in a controlled way,” Obernuefemann reports.

The law firm stores more than 19 million documents in eDOCS DM.

Along with matter-centric repositories, version control ensures the truth is always protected. “One of the great things about eDOCS DM is the fact that you can’t edit the document while somebody else is in it,” Obernuefemann says. “It’s basically a check-in, check-out function that precludes the ability of one person to overwrite the work that someone else has just completed.”

### eDOCS DM Latest Version Advances

In 2015, Lewis Rice piloted eDOCS DM 10 and discovered its advanced functionalities and superior user experience.

eDOCS DM 10 is based on research and feedback for a streamlined experience and extended capabilities for the digital world. Redesigned features drive useful capabilities, including:

- Intuitive user experience via desktop, web-browser, or mobile devices
- Simpler day-to-day searching
- Automated synchronization of content from cloud-based repositories and other locations through Sync and Save. The feature provides an easy way to ensure high value content is automatically managed, secured and governed to reduce risk.

We view version 10 as a watershed event for eDOCS,” Obernuefemann states. “Among other capabilities, it brings back what we’ve always loved, web-based access.” OpenText eDOCS

Webtop provides an intuitive, browser-based workspace for users. Whether via the web or desktop, “with the new eDOCS DM, the search is much faster,” Obernuefemann says, citing seasoned users who report they are pleased with the updates.

### Email Filing

Lewis Rice tracks and automatically files emails with OpenText™ Email Filing, eDOCS Edition. All closed matters go to eDOCS DM, where emails are managed, secured, and easily searchable. As opposed to a stub, “Email Filing actually takes the email as a MSG file and puts it into eDOCS, which is priceless,” Obernuefemann says. “It has all the record attachments, and the email is still live. You can profile it. You can search it. It’s a great tool.”

The Email Filing module also simplifies referencing or compliance with retention policies by maintaining a single data repository. Obernuefemann: “It becomes a godsend if the matter reopens or there’s any litigation.”

### Microsoft SharePoint Integration

Lewis Rice also plans to use solution components of OpenText eDOCS for Microsoft® SharePoint® to capture SharePoint content into eDOCS DM and expose access to the DM repository via the SharePoint user interface. With this solution, the firm will eliminate duplicate data in the collaboration platform. “We do not want SharePoint to hold any documents, it’s a portal,” says Obernuefemann. Attorneys will access a single site to view docket calendars along with matter files and emails in eDOCS DM.

***“The value we receive from OpenText and the availability and usability of the platform for our users and for our clients is well worth the cost – and has proven invaluable to our success.” ”***

PAUL OBERNUEFEMANN, CIO, LEWIS RICE

The law firm also integrates eDOCS DM with products commonly used in the legal industry, including Workshare, Microsystems, QuickFile and more.

### **Productivity-Driven Excellence**

Convenient, compliant document management positively impacts client service and productivity – providing invaluable returns, according to Obernuefemann.

Since lawyers live on the billable hour, organization and version reliability within eDOCS DM returns productivity that enhances service and yields a competitive edge. “The advantages for the firm to be able to search and keep data organized—it has no price as a service to the client,” Obernuefemann notes. For instance, when a client calls asking for the latest document, attorneys are

able to locate and email the documents during the same discussion. “eDOCS DM enables our users to work faster, which of course means they’re providing the clients with better service and they can keep their timeframes in check.”

Increasing the productivity of users increases the profitability of the entire entity—helping them work better and faster as a team, according to Obernuefemann. “Clients appreciate that,” he says. “They understand that we have the technology needed to service them in an efficient, professional manner.” In fact, after such service, some clients ask for document management recommendations and visit Lewis Rice to view eDOCS DM in action.

While eDOCS DM features apply to businesses across the board, some results are especially useful in the legal industry, according to Obernuefemann:

- Ethical walls – Lewis Rice uses dynamic views in eDOCS DM to secure documents to appropriate groups within the firm.
- Discovery reviews – By enforcing retention policies in a central location, calls for discovery are not hurried and expensive. “eDOCS becomes a money-saver because all of the data is located in one place.”
- Attorney-client privilege and other security regulations – A feature in DM 10 prevents emailing or moving documents outside of the system. With Email Filing, emails are automatically deleted within a set timeframe. “From a regulatory perspective, that’s a goldmine.”
- Legal billing structure – Every hour is charged to someone: external or internal. “It’s important the work is not wasted. Being able to organize and secure data and prevent overwriting becomes a good business model.”

### **Partnership with OpenText**

Lewis Rice has experienced many benefits from its working relationship with members of OpenText Professional Services and Customer Support – teams which help the firm to manage and optimize the value of its business-critical document management system. Obernuefemann explains: “The value we receive from OpenText and the availability and usability of the platform for our users and for our clients is well worth the cost – and has proven invaluable to our success.”

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