AMERICAN LEGAL TECHNOLOGY INSIDER

Aderant at the tipping point of being No.1 ?

The buzz from the recent Momentum conference in Miami Beach is Aderant has reached the tipping point and set to become the vendor of choice for larger law firms. There are a raft of upgrades and new orders waiting to be announced, and there are also some interesting new product positioning initiatives waiting in the wings.

The new Windows Workflow Foundation-based capabilities within Aderant Expert were greeted with enthusiasm, with some firms saying they have already achieved more with Windows Workflow than previously managed with 3rd party platforms, such as Metastorm. In fact the workflow message is sinking home to such an extent that in one session, a delegate had what can only be described as a Meg Ryan *When Harry met Sally* moment.

The conference saw further amplification of Aderant's product strategy. Essentially, Golden Gate is an 'iceberg' or enabling platform sitting on top of the current 7.5 release to allow users to take advantage of next generation tools and applications now on their current infrastructure. Next comes Titan (in effect Expert 8.0), which will bring a new family of optional workflow enabled apps that will still co-exist with existing applications and the underlying data schema. The overall intention, according to CEO Michael Kohlsdorf, is to create a framework that allows users to move forward, based on what their needs are – but without having to reinvest in or implement a whole new system, in the style of 3E. Turning to the longer term, Aderant is researching a number of areas including: virtualization, Sharepoint, cloud computing, .NET 4.0, data mining, touch surface computing (think the Tom Cruise movie *Minority Report*) and the Apple iPhone. In fact it was noticeable at the event just how many people now use an iPhone – although most also still carry a Blackberry.

May's big deals

Cooley Godward select Elite 3E
Palo Alto based Cooley Godward Kronish has selected Elite 3E as the platform for its new financial management system. "Cooley wanted to invest in a solution that would provide us the functionality and technology to meet the needs of our clients over the next 15 years with a provider that was committed to ensuring that the project would go live on time and on budget." said Lisanne Morales, the firm's CFO.

Alabama firm swaps out Elite for Aderant
Meanwhile the Alabama firm of Sirote & Permutt, which has 350 attorneys and support staff, has selected Aderant Expert to replace its legacy practice management system. Insider sources say the firm was an Elite Enterprise site that switched to Aderant after encountering difficulties trying to implement Elite 3E.

Seyfarth Shaw selects Recommind
Seyfarth Shaw LLP, which has 775 attorneys working across 10 offices, has selected Recommind's MindServer Search application as the search layer powering the firm's new Microsoft Sharepoint portal. The firm, which will be running MindServer Search in conjunction with its Autonomy iManage DMS, is also implementing Recommind's Matters & Expertise module, which can provide a firm-wide view of matters, deals, cases and experience by synthesizing multiple data sources.

Autonomy adds 'who knows what' to iManage

Autonomy has unveiled a new Expertise Location module for its iManage Universal Search (IUS) solution. The module is intended to help lawyers quickly and easily connect with other subject matter experts within a firm, so it can efficiently staff matters and match the right talent with the needs of a case. Autonomy say that as firms expand their global footprints, it becomes increasingly challenging to locate experts, respond to business development opportunities, ensure clients get access to the best experts, no matter where they are located and generally 'connect the dots' among related information. With a globally dispersed workforce, knowledge about 'who knows what' and 'who knows who' is often not readily available, without disrupting the entire organization with firm-wide email inquiries.

According to Rachelle Rennagel, Chief Knowledge Office at Sheppard Mullin Richter & Hampton, "Having an intelligent knowledge management system that connects our subject matter experts with the most relevant information in our firm is critical to our success in helping clients. I see tremendous value in the Expertise Location capabilities within IUS to help firms like ours enhance our ability to identify the right attorneys for the right matters."

• Autonomy's announcement was immediately attacked by Craig Carpenter, VP general counsel at Recommind, who commented "Autonomy continues to try and woo the legal sector under the Interwoven brand but these firms need assurance that their technology partners are experienced in the sector, knowledgeable of their specific needs and priorities, and committed to them for years to come. A one-size-fits-all approach simply does not work in the legal space. And, while the requirement to rapidly pinpoint expertise is essential, law firms need assurance that this data is fully secure, accessible by only authorized personnel, and accurate – a system that returns the wrong results has the potential to do much greater harm than good. In the legal sector this is particularly true and these firms need to know that any solutions they invest in, are based on proven, state of the art technology."

New hires

E-discovery veterans join Integreon

Coinciding with the news that Integreon has completed the acquisition of the e-discovery assets of litigation support services vendor Onsite3, Integreon has also announced two new hires. Babs Deacon has joined the company as a director responsible for the e-discovery consulting & data analytics group. Deacon was previously a senior manager at Baker Robbins & Co – she has also worked in litigation support for several major law firms. The second new hire is Foster Gibbons, previously corporate counsel and legal lead of the discovery response team at Pfizer Inc, who becomes a director of Integreon's global document review services group. Commenting on these developments, Integreon's senior VP for integrated discovery services Chris Egan said "the addition of two seasoned veterans to our team enhances our end-to-end litigation support service, which now includes the former Onsite3 business."

Aaron Brown joins Litigation Services Corp

Las Vegas-based Litigation Services Corporation has recruited Aaron W Brown as executive VP with responsibility for business development strategies. Brown's track record includes, most recently, VP roles at inData Corporation and LegalLink.

Peak Discovery promotes Max Weisman

Peak Discovery has promoted regional sales manager Max Weisman to the post of director of strategic alliances, based out of the company's New York office. In his new role he will be responsible for managing Peak's new dedicated partner program. For more details visit
www.peakdiscovery.com/partners.html

CRM4Legal economic stimulus

Client Profiles has announced what it calls the CRM4Legal 'Economic Stimulus Act' that allows law firms to acquire the Microsoft Dynamics-based CRM system at no cost for the first 5 user licenses. Commenting on the initiative, Client Profiles VP Michael White said "the program offers firms the best possible way to begin implementing CRM, free of the financial risk associated with some law firm technology schemes. Marketers of legal services now have the opportunity to explore first-hand all of the powerful business development and relationship management tools found within CRM4Legal and build the foundation of a production marketing automation system, before committing significant resources to a firm-wide rollout."

• To take part in this program contact Michael White on 510 912 0929 or **mwhite@clientprofiles.com**

Digital dictation news

Rogers Towers installs Verdatum DDS

Rogers Towers in Florida has become the latest firm to install Verdatum for Interwoven 3.0 as its firm-wide digital dictation workflow system. The firm's IT director Kevin Rorabaugh said key factors in the selection process included the fact Verdatum is a US-based vendor with entirely US-based support, plus the integration with the DMS means there is the same audit trail and ethical wall adherence for dictation as exists for documents.

Bighand DDS now Sprint certified

Bighand's digital dictation workflow software has been awarded Sprint Smartphone certification for use on Sprint networks.

New platinum partner for Philips

Voice Products of Wichita, Kansas, has become the latest platinum level MDCE partner for the Philips Enterprise DDS range of hardware and software.

• We're also hearing that Canadian dealer Rolling Thunder, out of Hamilton, is enjoying considerable success with the Philips' trade-in programs from the old Philips Pro software and from Olympus software to the new Enterprise system.

New wins

Ohio insurer buys Client Profiles case

Columbus, Ohio-based State Auto Insurance has selected Client Profiles Case Management software for its legal claims counsel department. State Auto counsel Bill Peters said the decision to go with Client Profiles was based on the solution's ability to consolidate pertinent case information across all offices and its strong management reporting capabilities. In an implementation project that will include Microsoft Outlook integration and Client Profiles' document management system, State Auto will use Client Profiles' workflow features to set up standard processes for handling files, streamlining document assembly and setting automatic reminders.

Handshake selected for Microsoft Innovate

Handshake Software has been selected for inclusion in Microsoft's 'Front Runner for Innovate on User Experience Program' on the strength of its work with Silverlight.

King & Spalding select Cypress

King & Spalding has selected the C4 IP hosted unified communications system from Cypress Communications and will be deploying it across eight US offices and five EMEA offices located across 12 timezones. King & Spalding's CIO Gene Viscelli said the "integration of voice, video and web conferencing will enable the various practice groups to communicate and collaborate effectively, no matter where they're located." Cypress will also be providing the firm with advanced MPLS data services to support their global efforts to increase bandwidth and achieve higher availability and survivability.
www.cypresscom.net

Thought Leader: An inhouse counsel's guide to e-discovery solutions

by Karthik Kannan, VP marketing & BD, Kazeon Systems

With litigations on the rise and budgets on the decline, corporations are searching for methods to conduct e-discovery that not only can be entirely defensible but also affordable. As a result, corporations are considering bringing e-discovery inhouse, and many already have. A key driver for going inhouse is the fact that typically, corporations do not want to outsource all of their e-discovery needs since it can be expensive, infeasible and unnecessary. Change will be needed to accomplish this – corporations cannot manage all the point solutions for collection, analysis, review, legal hold, etc.; they need a consolidated, integrated solution that provides end-to-end e-discovery. And it should exist inhouse. As corporations go through the selection and deployment process of in-house e-discovery solutions, there are seven important considerations to think about that will help determine the success of the solution.

1. Analysis & Review

When assessing the risk of existing electronically stored information (ESI), a quick and thorough analysis needs to be performed with a variety of parameters on the ESI data. The ideal solution needs to have analytics capabilities that support multiple entities such as concepts, data ranges, custodians, content types, etc. In particular, concept analysis is important for any solution that assesses the information risk for a litigation request, since it can uncover that context, and limit the analysis on only the relevant dataset. The end-result of these capabilities is the ability to perform effective early case assessments and thus enable intelligent, quick decisions on course of action related to litigations.

2. Legal hold & defensibility of e-discovery workflow

It is important to note e-discovery typically is initiated by issuing appropriate legal holds. These legal holds should be as targeted as possible, a result of the superior identification and analytical capabilities of the chosen software. Legal hold may be executed on relevant documents at their original source location (in-place), or moved and secured in target repositories, such as Symantec EnterpriseVault. In all cases, the source data/evidence must be preserved without ⇨ altering any of the original metadata and preventing data/metadata alteration or spoliation, and an audit trail must be captured.

3. Enterprise-wide coverage

The complexity of today's enterprises and the variety of locations that ESI can exist in, makes e-discovery an extremely challenging process. The chosen software needs to provide deployment options to cover remote offices/branches, data centers, mobile workers and a variety of sources ranging from file servers to email servers and archival systems.

4. Processing

There is typically a vast amount of information that needs to be processed and indexed in e-discovery. Both processing and analysis need to operate at the source itself while also guaranteeing no metadata alteration. Since there is no need for migration into any external repository, collection is only done on a per-need basis, typically during litigation. In addition, it is equally important to share the metadata indexes across legal matters to minimize the overall total cost of ownership and the impact to the corporate environment.

5. Scalability & Performance

The chosen software needs to be able to perform inhouse and in-place analysis and review, thereby avoiding data being transferred outside the enterprise or country. Further, distributed and collaborative analysis and review capabilities are key in order to allow multiple reviewers, such as inhouse lawyers, law firms and external reviewers, to collaborate in a high throughput fashion. It's also important for a solution to be able to perform its processing and analysis as fast as possible. *...page 6* ⇨

Case Study: Wyeth moves into integrated electronic billing

As is the case with an increasing number of corporate legal departments today, global healthcare leader Wyeth shed its legacy matter management and e-billing systems in order to implement a combined solution for both. But what is fueling the migratory trend towards combined systems?

Increasingly, tech-savvy legal departments and attorneys are looking to technology not only to support business processes but to optimize them. Legal departments have fewer resources and must do more with less. As such, they are looking for tangible productivity gains and cost-savings, and the technical inefficiencies of years past are no longer acceptable.

"We have roughly 140 internal users. For our staff to properly review invoices, they need access to additional, relevant matter information," explains Dexter Carpenter, director of law financial operations and systems. "Previously, we used two systems for matter management and e-billing. In order to review an invoice for a certain matter, you had to exit the e-billing system and go into the matter management application. This was inefficient and cumbersome. We wanted a combined solution that would not require us to switch between applications to find the right data."

To address this need, Wyeth's corporate legal department chose Mitratech's TeamConnect with Collaborati Spend Management (CSM) to manage internal legal operations, including the 350 law firms and 165 e-billing firms it employs to help it provide legal services to Wyeth's global operations. As far as results, on the cost-cutting side, streamlining invoice work flows has given Wyeth the ability to monitor outside counsel expenditures in real-time and create more accurate legal budget and spend reports. The application also features executive dashboards allowing Wyeth management to view the department's overall outside counsel spend and or budget/spend data on a law firm by law firm basis.

"E-billing lets you slice and dice spend information in many different ways. Doing that with the old system was ⇨ cumbersome. You had to pull the data out of the matter management and e-billing systems and put it into spread sheets," says Carpenter. "When you merge data from two different systems, there's a chance you may overlook something or leave something out. With TeamConnect, we have everything in one place."

Wyeth's previous experience showed it was difficult or impractical for smaller firms to submit invoices electronically. Since the company uses a lot of smaller firms, they were still receiving a significant amount of paper invoices. Wyeth wanted a solution to make it easier for these firms to submit invoices electronically for a holistic view of outside legal expenditures and activities.

"Our legacy e-billing vendor had a platform and cost structure that made it hard for the smaller, less technically advanced law firms we do business with to submit invoices electronically," explains Claudio Crisafulli, associate director, corporate & HR information systems. "TeamConnect CSM provides a flexible, user friendly interface that eliminates the barriers preventing any firm from submitting invoices electronically. With TeamConnect CSM, even our smallest firms can participate in the program."

Transitioning law firms from the legacy e-billing system to TeamConnect CSM involved a 20 minute set-up process. Each firm was provided with an instruction guide and a wizard application that walked them through the process. All of Wyeth's primary law firms were up and running in about four to six weeks. "We explained to our law firms that they would benefit from this system as well. Bills get to our attorneys sooner, and they are reviewed, processed and paid sooner." ⇨

Total PMA aims to help smaller firms to 'get a life'

The Total Practice Management Association (Total PMA) is a new organization dedicated to the advancement of attorneys, paralegals and other legal support staff in their efforts to build and manage profitable practices. To this end, Total PMA is holding an inaugural conference – on the theme of Get a Life – at the Chicago Hyatt Regency on 27 & 28 May. Total PMA president Kevin Chern said the conference would provide attendees with hands-on training, resources and best practices to help solo and small firm practitioners grow their firms and manage their offices without sacrificing their personal and family lives. Topics that will be covered include legal marketing, social media, office infrastructure, technology services and outsourcing.
www.totalpma.org

News in brief

CoreVault awarded SAS 70 type II certification
CoreVault, a provider of online data backup and recovery services, has been awarded SAS 70 type II certification in recognition that it provides a safe and secure environment, with adequate controls and safeguards in place to protect customer data.

Atlanta Bar becomes latest EsqSites123 affinity partner
The Atlanta Bar Association has selected EsqSites123.com to provide web design and hosting services to its 6300 members. As part of the affinity relationship deal, EsqSites is also offering Atlanta Bar Association members discounts on its design fees.
www.esqsites123.com

CPA Global partners with Casewerx
CPA Global, one of the world's largest providers of legal outsourcing services, has partnered with Casewerx Development to provide corporate legal departments and law firms with a standard platform for managed document review services. The partnership will see CPA enhancing its existing document review services with a customized version of Casewerx's DiscoveryMetrics web-based document review analytics technology. CPA says that on one of its current projects, it is saving a corporate client of $15 million on document review fees.
www.cpaglobal.com
www.discoverymetrics.com

Wyeth e-billing case study
➡ *continued from page 5...* "We've made the process more manageable and efficient. We have good relationships with our firms and we want to keep it that way," says Crisafulli. "Collaborati makes it easy for law firms to submit invoices and easy for our attorneys to review them. If an invoice meets the billing guidelines and is approved, it gets paid. If there are questions about a bill, we know exactly where it is in the workflow and can take the appropriate action."

Based on this success, Wyeth is in the process of developing a new application that will automate the way outside counsel budgets are submitted, reviewed and approved. Wyeth will provide an approved budget proposal format and upload it to the corresponding matter by firm. This will allow for real-time budget comparisons during the invoice review process, which will help the department continue to streamline its internal processes and improve the level of services it provides to internal clients.

Inhouse e-discovery thought leader
6. Defensibility, Accuracy & Auditing
➡ *continued from page 4...* End-to-end auditing and defensibility of the e-discovery process is a must; the chosen solution must provide complete logging of all actions, verification of data and metadata, and ensure complete reporting of all stages of the e-discovery workflow. With these capabilities, a system can offer a forensically sound corporate e-discovery workflow.

7. Reporting
Finally, any good solution for e-discovery needs to provide complete and accurate reporting. This should include exception reporting, which has the ability to reprocess documents with different parameters. Also, the exception processing path should be very robust because a large amount of cost can be associated with processing unprocessed documents.

Lit support & e-discovery news

LDM Global opens US office

Litigation support services provider LDM Global has opened its first US production facility in Pawcatuck, CT. The center will allow the company to provide on the ground support of hosting, consulting, e-discovery, tape restoration and computer forensics operations.
www.ldmglobal.com

DTI adds Relativity dimension

Document Technologies Inc (DTI) has added kCura's Relativity web-based document review and management system to its portfolio of e-discovery offerings.
• Thomas J Bray has now joined DTI as a senior project manager with responsibility for e-discovery projects. Prior to joining DTI, Bray was a litigation technology consultant for SecureImpact in Atlanta.
www.dtiglobal.com
www.kcura.com

Major enhancements to eMag Vu suite

eMag Solutions has added new functionality to its eMag Vu hosted enterprise software suite. New features include scalable email, de-duplication, reconstitition and ingestion. The latest version of eMag Vu has already been used to process single projects with more than 500 million email messages and user files, with a sustained throughput in excess of 20 terabytes a day.

PSS launches discovery cost forecast module

PSS Systems has launched its Atlas Discovery Forecasting (DCF) module. The company says Atlas DCF is the first litigation workflow system to provide instant cost forecasting as soon as legal holds are scoped, as well as continuous cost forecasting as matter facts change over time.
www.pss-systems.com

New product launches & upgrades

PensEra TimeKM now Avaya compliant

PensEra Knowledge Technologies reports that its TimeKM Extend-VoiP product is now rated compliant with internet protocol telephony solutions from Avaya. The Extend-VoiP product allows firms to accurately capture call detail data for use in billing clients call activity and/or time spent on the voice communications. ⇨

⇨ In a related development, IntApp has just announced Time Builder support for PensEra TimeKM. This means Time Builder's automatic 'daily diary' of attorney activity can now be submitted directly to TimeKM for billing.
www.pensera.com
www.intapp.com

New version of Tabs3 outputs to Excel

Software Technology has released version 15.2 of its Tabs3 billing and PracticeMaster practice management systems. New features include the ability to output reports to Microsoft Excel, a top client report, toolbar plug-ins and a client inactivity report for PracticeManager that should help prevent cases from falling through the cracks.
www.tabs3.com

American Legal Technology Insider

The Backpage

Software helps firm increase its pro bono impact
New York-based Manatt Phelps & Phillips says its use of Pro Bono Net's Pro Bono Manager software has helped the firm 'significantly reduce labor-intensive administration from its pro bono program' and, as a result 'the firm dramatically increased the number of hours its attorneys devote to public service and reached a new high for pro bono in 2008.' The firm says pro bono reporting now takes 80% less time, while the firm's 400 professionals achieved an all-time high of nearly 33,000 pro bono hours in 2008. Pro Bono Manager is a web-based hosted service built on Microsoft Sharepoint 2007 and SQL Reporting Services.

XMLAW one of the best places to work
Congratulations to Sharepoint specialists XMLAW, which has just been named as one of Boston's best places to work by the *Boston Business Journal*. And, congratulations too for attaining gold certified status in Microsoft's partner program for the fifth consecutive year.

New directors and new chapter for Women in eDiscovery
Two years after Women in eDiscovery held its first meeting in Washington, DC, with just 30 women in attendance, the organisation has grown to 3500 members and 30 chapters worldwide. The latest chapter to open is Chicago, where Katie Jensen is the chapter director. The organization has also appointed four new regional directors – Babs Deacon (Northeast & International), Lisa Ghezzi (Southeast), Lindsay Stengle (Central) and Twilla Case (West).
www.womeninediscovery.com

Typo alert
In last month's story on the appointment of Virginia 'Val' Reece as Saturn27's new North American director, we should have said she was previously with Bingham McCutchen – and not Binham – in Boston.

New product launches

Saturn27 highlights Positive Pay in Miami
At last month's Aderant Momentum user conference in Miami, Saturn27 demonstrated its fully automated solution for handling the 'Positive Pay' anti-fraud measure. The system was originally developed for the South Carolina firm Haynsworth Sinkler Boyd.
www.saturn27.com

CompareDocs now links to Worldox
DocsCorp has just released an enhanced version of its document comparison application – pdfDocs compareDocs – for the Worldox document management system. As a result of the integration, users select the documents they want to compare in Worldox and then click the 'compare' button in the main menu.
www.docscorp.com/comparedocs

Compulaw releases FTC rules
Compulaw has added the Federal Trade Commission (FTC) deadlines to its library of federal rules offerings. The package covers FTC Rules of Practice set out in 16 CFR parts 3 & 4 and includes deadlines for all stages of adjudicatory proceedings.
www.compulaw.com

Next issue...
The next issue of ALTi will be published on Thursday June 18, 2009. The editorial deadline is June 16 – 6:00pm EST. In the meantime, keep up with latest news on our blog at www.theorangerag.com

THE ORANGE RAG
BREAKING NEWS BLOG
LEGAL TECHNOLOGY INSIDER