



## Success story

### Thompson Dorfman Sweatman LLP

#### Industry

- Legal

#### Solutions

- OpenText™ Document Management, eDOCS Edition
- OpenText™ Email Filing, eDOCS Edition

#### Partner support

- ADV



# Rapid access to content helps TDS maintain exceptional client service

**Canadian law firm boosts productivity with OpenText™ eDOCS**

## Results



**Increased** attorney and staff **productivity**



**Enhanced service** to clients



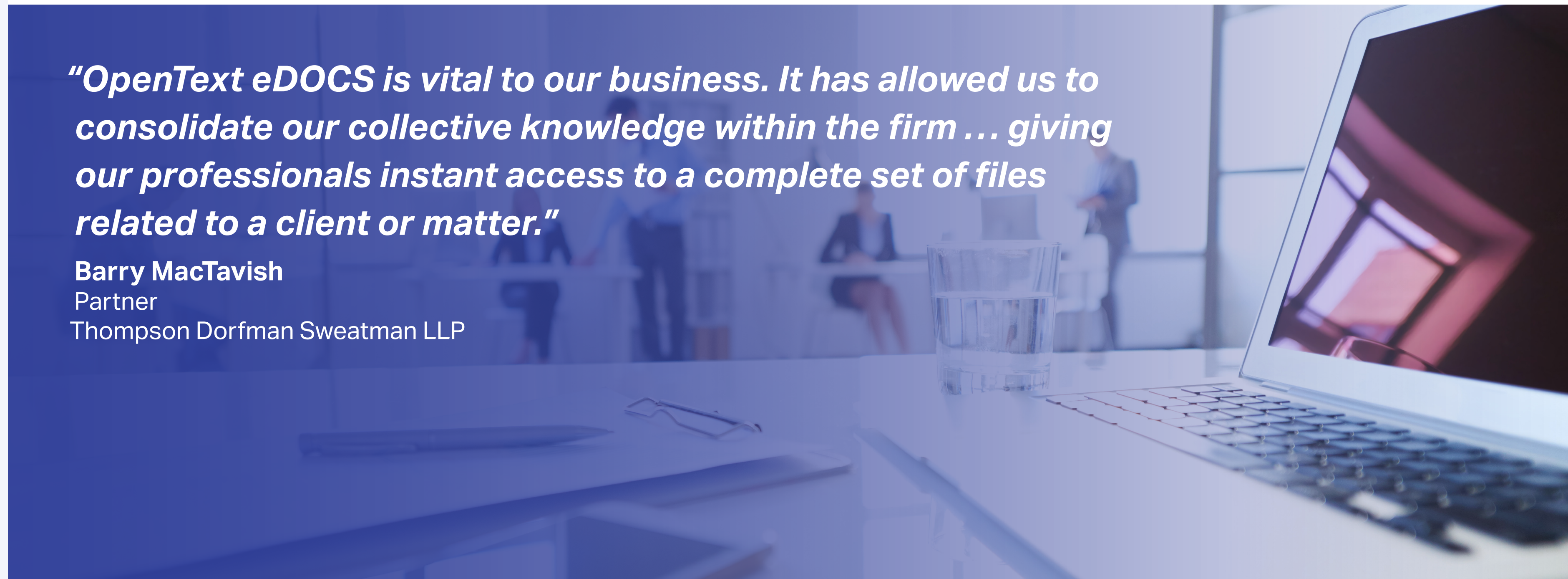
**Aided recruitment** for potential business and new hires

***“OpenText eDOCS is vital to our business. It has allowed us to consolidate our collective knowledge within the firm ... giving our professionals instant access to a complete set of files related to a client or matter.”***

**Barry MacTavish**

Partner

Thompson Dorfman Sweatman LLP





**Founded in 1887, Thompson Dorfman Sweatman LLP (TDS) is a full-service law firm with 10 offices across Manitoba, a province located in western Canada. TDS has provided legal services to clients for over 130 years in more than 25 areas of practice, building its reputation on relationships spanning multiple generations.**

While steeped in history, TDS has found that embracing technology enhances its ability to deliver exceptional service to clients. Such was the case when the firm implemented OpenText™ Document Management, eDOCS Edition and OpenText™ Email Filing, eDOCS Edition, which have aided TDS lawyers' ability to quickly find and modify essential content and service clients more efficiently.

***"eDOCS is vital to our business,"*** said Barry MacTavish, a TDS partner who specializes in corporate finance and securities law. ***"It has allowed us to consolidate our collective knowledge within the firm ... giving our professionals instant access to a complete set of files related to a client or matter. eDOCS gives us complete information because of the wide range of document formats that you can process and save into the library."***

### **Centralizing content and streamlining operations**

TDS first installed eDOCS in 2003 to tame the proliferation of document repositories across the firm. Previously, each lawyer maintained their own folder under a shared drive; finding letters or agreements often turned into an email chase, checking with colleagues on the status or location of documents.

With eDOCS, more than 215 users, including attorneys and staff professionals, can easily access files from the firm's centralized and secure repository. eDOCS supports smooth day-to-day operations with minimal interruption for searches, serving every aspect of TDS business—from case work to account billing.

***"Prior to eDOCS, people had great difficulty finding the appropriate precedents or historical information,"*** MacTavish recalled. ***"There's nothing worse than spending a morning trying to find a document or an agreement you worked on two years ago. Now with eDOCS, you can find it in a minute or two."***

### **Less paper, more functionality**

eDOCS has also supported the firm's move to a new, modernized office in downtown Winnipeg. In preparation for the move, TDS legal teams scanned significant volumes of paper documents for input into eDOCS, therefore reducing the amount of paper to be transferred to the new location. Over time, TDS has become increasingly paperless, focusing on electronic document management and simplifying access to critical content.

With a recent upgrade, users have gained FlexFolders which allows them to view content customized to individual preferences. This feature allows lawyers to work with electronic files much as they would have with a paper file, according to MacTavish, without compromising on compliance or security standards. In fact, when moving documents between folders, files automatically re-inherit the properties of the new folder, ensuring security and metadata is consistently applied.

While FlexFolders has gained firm-wide approval, even among paper stalwarts, Email Filing's ability to simplify and streamline operations has been the most well received. MacTavish recalled the excitement of TDS professionals to capture, organize and classify emails alongside related content in the eDOCS library: ***"Email Filing has certainly made our lives easier in terms of being able to quickly save emails into the document repository and easily find them when needed."***

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MacTavish also mentioned how TDS lawyers, when not in a board room meeting with clients, spend much of their day at their desks working on email. ***“Email Filing is a time-saver ... the ability to use FlexFolders in Outlook to drill down, find all related emails and sort them in whatever order you want, the time saving is immeasurable.”***

### Valuable partnerships

Aided by OpenText, TDS will continue its enduring legacy built on strong relationships. Put into practice, efficient document management influences the promptness and accuracy with which TDS professionals serve their clients.

Effective solutions also serve as a recruitment tool as well, according to MacTavish. The best and brightest out of law school often inquire about technology during interviews, he related. They want to join a firm with the best technology available to allow them to practice law.

The same holds true for potential clients. ***“When you’re making pitches to get their work, they want to know what kind of technology you’re using,”*** MacTavish said. ***“When you tell them that you have a state-of-the-art solution for managing documents, it certainly helps your chances of securing that client’s business.”***

Another valuable partnership has been with OpenText partner ADV, which led the eDOCS implementation and leveraged EDV to support TDS’ customized folder structures. MacTavish noted how ADV’s responsive service and targeted training was essential to internal process changes and user acceptance of the technology.

In looking to the future, TDS plans to continue using technology to propel the firm forward by moving eDOCS to the cloud. And, by offering lawyers mobile access to files in their document repository, TDS professionals can continue working even while away from the office.

### 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.

[www.advdoc.com](http://www.advdoc.com)



### 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](http://opentext.com).

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