



One of the major benefits I see with KwikTag is that it takes a very simple and intuitive approach to integrating with our existing software applications and processes. »

John Sroka, CIO – Duane Morris LLP

kwiktag[®]

Imaging for Law Firms

Duane Morris LLP | Nationwide

Customer Profile:

Duane Morris LLP

Duane Morris LLP is among the 100 largest law firms in the United States. With over 600 attorneys and 20 offices, Duane Morris represents clients across the nation and around the world. In addition to legal services, Duane Morris has independent affiliates employing over 100 professionals engaged in other disciplines to offer clients a complete portfolio of services.

The Challenge:

No Central Repository

Like many law firms, Duane Morris faces the daily challenge of filing, storing and retrieving the plethora of documents associated with client case files. They already had an Interwoven document management system, but still had file cabinets and wanted to consolidate all matter related correspondence (both print and electronic) into one central repository.

Duane Morris also wanted to streamline the cumbersome process for client billing. When it was time to bill a client, vendor invoices would have to be retrieved from the files, copied, attached to the bill and then re-filed. Not only was this task incredibly time-consuming, but it left critical documentation vulnerable to misfiling – and without an electronic backup in case of disaster.

Overview

Summary

Duane Morris LLP has been using KwikTag for over three years to facilitate processes for document management, accounting and human resources to streamline their business and secure their critical legal documents.

Departments

- Document Management Users
- Accounting
- Human Resources
- Law Library

Documents Scanned

- Contracts
- Invoices
- Client/Case Correspondence
- Human Resource Records
- Firm Library

Solution

- KwikTag for Interwoven
- KwikTag for Elite Billing and Accounting
- KwikTag Basic

The Solution:

An Enterprise-Wide Electronic Filing System

Three years ago, CIO, John Sroka, recognized that these challenges needed to be addressed and prioritized within the organization. After researching multiple software applications, the KwikTag solution from ImageTag was selected. The key differentiators of KwikTag were its seamless and uncomplicated integration into Interwoven, the minimal user training required and the future uses for KwikTag across the firm.

The installation took less than a day and with the creation of an e-learning module on Duane Morris' intranet, new users were able to learn the process in a matter of minutes. The deployment was so successful, that within a year the IS department integrated KwikTag with their Elite billing and accounting system. The accounting department now scans all incoming invoices and stores them electronically, eliminating the burdensome invoice filing and retrieval process.

Duane Morris has also taken advantage of KwikTag for other uses across the organization. The firm's legal library now has access to KwikTag and with a recent acquisition, the HR department was quickly able to access personnel records by having the acquired company scan all documents into KwikTag.

"The applications across the enterprise are endless," states CIO, John Sroka. Recently, the Duane Morris Philadelphia headquarters moved to a new building. Six months prior to the move, the 60 people in the IS department were told they would not be able to bring hardcopy files and paper documents to the new location because of space and budget constraints. They required the staff to either scan or discard old documents. Not only did this save the firm time, money and space, but it ensures their important documents are now electronically backed up and can be shared firm-wide.

"Because we have over 20 locations and 600+ lawyers, the ability to share documents across the organization and access them anytime, anywhere is a huge benefit," says John Sroka. "Additionally, this aids in our business continuity and disaster recovery plan. Documents are now housed on our secure and backed-up network, instead of in vulnerable paper file cabinets."

The firm will also be conducting further training for their 1,600 staff members on how to use FileSite, Interwoven's e-mail management system, and KwikTag conjointly to electronically store all company documents.



Results

Consolidated Case Matter Repository
KwikTag integrated into Interwoven DMS creates one centralized repository for all case file matters and enables document sharing across the organization.

Streamlined Billing Process

With the integration of KwikTag into Elite, invoices are now immediately scanned when received and stored electronically, creating an efficient and cost-effective billing process.

Anytime, Anywhere File Access

Attorneys now have access to all case matter, whether it originated on paper or electronically – wherever and whenever they need it.

Enhanced Disaster Recovery Plan

By storing all documents on the network, the firm is assured of business continuity should disaster strike.

Maximized Office Space

Requiring employees to scan or discard paper documents maximizes new and existing office space.



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