

The Haskins Law Firm Creates Actionable Knowledge Base Using Xpiori Content Manager, XCM

XCM quickly becomes the first place employees look for information

Company

The Haskins Law Firm
Colorado Springs, CO

Industry

Business and Commercial Law

Web Site

www.peaktrial.com

Background

The Haskins Law Firm needed to manage current matters and legacy information more efficiently

Challenge

The Law Firm wanted all of its information easily accessible in one searchable store, but at an economical price, without disruptions to the network

Solution

Xpiori XCM provided a cost-effective, easy-to-use content manager that was operational within one day. Now all of the Company's documents and emails exist in one fully-searchable knowledge base.

Why XCM?

- Quick and Easy to install and use
- Less costly than other content management or knowledge-base software, while providing complete management options and complex search capabilities
- Works as a stand-alone or in conjunction with existing content management applications
- Automated transfer agents and processes take all of the guess work out of migrating electronic and paper documents into the searchable store.

The Haskins Law Firm (five attorneys, three paralegals and associated staff) deployed Xpiori XCM to create a knowledge base of all of its information — legacy and new — enabling extraordinary customer service, reuse of prior work product, advanced documentary research, organization and analysis for complex litigation, control of communications and enhanced quality assurance . Serving as the initial test site for the product, the firm was deeply involved in the development of requirements for the product.

Managing Content in the Legal Practice

Founded in 1992, The Haskins Law Firm has conducted a broad general practice with particular emphasis on commercial, securities and real estate litigation, real estate financings and syndications law. The firm has a history of technology adoption and conducts operations in as paperless an environment as possible. It scans all new paper communications and discovery, aggressively managing and deploying email, and using advanced file server management applications.

Over the course of many years in business, the firm accumulated large volumes of case files and related legal documents and research notes. Tom Haskins, principal owner of the firm, has searched for ways to leverage all of the firm's documentary content to enable professionals to quickly research and learn from past cases and to increase the efficiency of the staff while insuring proper handling of documents.

Creating a Knowledge Base

When approached to be a beta test site for the Xpiori XCM product, Tom indicated that he would be happy if his staff could drag and drop files, email and other data to searchable files and then do advanced text searching on the files.

After the install of the first version of XCM, Haskins and Xpiori reviewed it and concluded that the product required too much manual effort for the efficiency desired. They determined to use a separate but lower cost server and operate the product as a separate appliance on the network to avoid interference with normal network operations and to assure high speed and high performance. Xpiori engineers automated all install and update activities, copying all of the firm's documents and emails, and scanning all image files like faxes, into the XCM data store. Documents could be searched in their entirety or on a more restricted basis as appropriate. The goal was to create a knowledge base, easily used by all employees, for all of the firm's information assets.

As a result, the product now has the following features:

- Full Enterprise Search of all documents and associated metadata;
- Automated installation to a separate low cost server to assure high performance and non-interruption of current business processes on the firm's existing server;
- Automated copying and indexing of all legacy and new files existing on the network, eliminating the need for the manual drag-and-drop process;
- Use of "transfer agents" to automate the transfer of data to the XCM server and to monitor changes to documents, together with additions and deletions of documents;
- Automated OCR of all scanned image files containing text, which constituted about 15% of the 170,000 legacy documents, to make them searchable;
- Automated copy of all email – legacy and new as they arrive – to the searchable store through direct access to the firm's exchange server;
- Organization of files into folders in the same manner as reflected on the firm's file server – essentially in the same format as would be displayed by Windows® Explorer;
- Document management features such as version control and "check-in/check-out".

"We were surprised to learn that we had 170,000 +/- documents stored on the network, some 35,000 of which were emails; and, 25,000 were "image text" that required OCR to be searchable," Tom said. "We need the automated install and updating to avoid tying up staff with tedious and ancillary work. With the exception of the OCR process, the data store can be loaded in less than a day. The OCR operates in the background for an extended period of time until completed."

XCM Functionality Reflects the Firm's Needs

Real-world experience at The Haskins Law Firm is reflected in the XCM product. Users:

- Load large volumes of documents received from clients or through discovery, making them immediately searchable
- Use the search capacity to organize cases along substantive lines without having paralegals read every line of every document received in a discovery dump
- Add research from third party sources such as Lexis, Westlaw, etc., to the client/matter file and have it continually searchable without having to go back on line.
- Annotate and add metadata to various documents, such as dates and date ranges, to provide context and insight for later use
- Access archived and other legacy information by the search capacity for use in new matters and for significantly improved response time to client inquiries



Tom Haskins

Tom said further: "Our lawyers and staff can unlock the vast knowledge available from documentation we have previously developed for use again in new projects, without time-consuming visits to paper archives. We — lawyers, paralegals and support staff — all use XCM's enterprise search feature and its drag-and-drop function to build an information base for each matter, to organize matter quickly, and to make sure that all information is in the correct file. It makes it easy to find even "lost" items that had been misfiled. We no longer lose information and corporate history when people leave the firm for new opportunities."

The capability to scan every document with optical character recognition (OCR) has proven to be an invaluable benefit of XCM. Tom Haskins said, "We had no idea how valuable the automated OCR would be. After dealing with the complexities associated with our existing applications, it was a welcome relief that we no longer have to manually do anything to make scanned image documents text searchable."

“The search results are reflected on the scanned image document with the OCR’d version standing, in effect, behind it. We always know when we are dealing with an original document.” He added, “I think you will find that paper files are little used by your staff once you have XCM installed.”

“With the integration of email from our Exchange Server, my project leaders and I can know exactly what was communicated to and from the firm on any matter ... and we can search attachments automatically once we add the email to the client/matter electronic file.”

Remote Access; Access Control

The product is constructed using web services, allowing enterprise level client-server access as well as secure web-based access over the public Internet. The sophisticated access control tools enable the limitation of use and access that the firm requires.

XCM Becomes the First Place to Look for Information

“Now that XCM is fully operational,” Tom related, “we find that the ROI is easily provable, even anecdotally. We are on the system all of time. It has become the place we look first for information.” Consider the following examples from Haskins’ experience:

- Customer service – a client called for information and advice on a matter closed ten years ago. The information pertaining to the case was quickly found, the controlling contract was identified and advice given in a 30 minute cycle while the client was on the phone.
- Substantive results – an improved parcel of real property was being sold and the title company had missed information related to special variances that gave effect to its use. We recalled that the issue had arisen in a similar prior transaction and found the documentation in a few minutes, and the substantive issue was dealt with before the closing and not after.
- Substantive results – “. . .we receive boxes of information during discovery, some paper and some electronic. The paper is scanned and the electronic information dragged-and-dropped into XCM. It is immediately searchable on substantive content, enabling our lawyers to organize the file quickly. We can now compete more effectively with the larger firms who have tons of people resources for analysis of documents for sundry references and the like.”
- Email records - email can be searched to determine what has been said and delivered by all persons working on a project, giving the project manager full knowledge of status of communications at all times and dealing with issues as to what was sent to whom and when.
- Administrative efficiency - Paraprofessionals and skilled administrative staff now easily keep client matters up to date, assemble substantive information for review, and find missing or wrongly filed documents.

XCM Enables Complex Searches; Highly Discriminating Results

The search routines are those that are used by lawyers in Westlaw or Lexis text searches –keyword, Boolean, proximity, synonym, fuzzy, etc. – and, therefore little training is required for use. Tom said, “People should not equate this product with the rather simple desktop search products that have become available. I have used them both and compared the results – hundreds of document references to the open-ended key word searches compared with the discrete and limited but accurate references to **the** content in **the** key documents. The search results are amazing.”

“We wanted all of our people to use it and were relieved that Xpiori did not plan a complex “concurrent” user license structure but would rather license based on the number of knowledge workers in our firm. We wouldn’t have it any other way. Our people are on the system all day long. Personally, I use the search at least 15-20 times per day and am always amazed at the results.” Documents managed by XCM become useful information assets, creating significant competitive advantage by empowering users with easy organization, distribution, reuse, sharing, searching and updating of both operational and legacy file content on the network. XCM is powered by Xpiori’s proprietary and patent protected Xpiori® XMS.

For more information about Xpriori, including our product brochures, white papers, and company information, please visit us at www.xpriori.com.

About Xpriori

Xpriori is a technology innovator and provider of a self-constructing XML database and related products that are powered by the company's patented Digital Pattern Processing technology.

Xpriori's products allow organizations to rapidly respond to changing business requirements by eliminating costly database development time and enabling the creation of adaptable applications – business applications that easily adapt to heterogeneous and ever-changing data sets.

Xpriori is privately held and headquartered in Colorado Springs, Colorado. For more information, visit us on the web at www.xpriori.com.

Xpriori XMS

Xpriori® XMS, XML Information Management System, is a self-constructing native XML information management system built on Xpriori's patented Digital Pattern Processing technology (DPP) for the purpose of persisting, managing and developing solutions with XML.

Xpriori Content Manager, XCM, is only one of many applications built to leverage the power of DPP and XML using Xpriori® XML Information Management System.

With Xpriori® XMS, changes in business requirements or upgrades in functionality can be accomplished without traditional application and information design, significantly increasing an application's extensibility and flexibility while dramatically reducing its time to market and total cost of ownership (TCO). Using a pattern-centric approach, Xpriori customers realize a competitive advantage through their ability to deploy high-performance, customizable applications that fully leverage valuable XML information. Please contact Xpriori to find out how we can help you to build XML-centric applications.

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