



Oppenheimer Streamlines Document Reuse and Reduces Document Risk While Empowering Attorneys, Secretaries

As part of an upgrade to Office 2003, Oppenheimer Wolff & Donnelly LLP needed to improve its existing workflow for reusing documents so that quality could remain high and risk could be reduced. Oppenheimer leveraged its status as a Microsystems Knowledge Partnership client to upgrade its entire user population to DocXtools, Microsystems' document analysis, clean-up and formatting software. As part of the upgrade, Oppenheimer engaged Microsystems Consulting to configure DocXtools toolbars for its end users and for its Technical Support team. As a result, the firm improved its procedures for repurposing documents allowing them to maintain document quality while also mitigating document risk.

Firm Overview

Oppenheimer Wolff & Donnelly LLP is a mid-sized law firm with 115 lawyers and 165 staff in its Minneapolis office. The firm provides legal counsel to several vertical markets, including technology, advanced manufacturing, financial services and health care.

Situation

Oppenheimer underwent a comprehensive roll-out of new desktop applications, including upgrades to Office 2003, the firm's document management system and Microsystems DocXtools software. Additionally, Oppenheimer desired to proactively reassess its internal procedures for producing new documents that are based on existing documents so that it could maintain the quality of its work product while also mitigating the risk associated with repurposing documents – such as the propagation of bad metadata, inconsistent firm branding and document instability. Senior Applications Analyst Margie McGuire is responsible for application integration and customization. As a DocXtools user familiar with Microsystems' document expertise, Ms. McGuire decided to reach out to the company in order to seek its assistance in streamlining the firm's workflow for document reuse – creating new documents based off of legacy Oppenheimer documents or documents received from outside of the firm.

Solution Overview

Company

Oppenheimer Wolff & Donnelly LLP

Customer Profile

Oppenheimer is a mid-sized law firm composed of 115 attorneys in its Minneapolis-based office. The firm has ten different practice areas, including corporate, intellectual property and real estate.

Business Situation

Oppenheimer desired to reduce the risk inherent with document reuse activities carried out by its attorneys and secretaries.

Solution

Oppenheimer upgraded to DocXtools, the document clean-up and formatting software that is a part of Microsystems Knowledge Partnership.

Benefits

- Oppenheimer attorneys and secretaries can reduce 75% of the time spent repurposing a document received from outside of the firm into a properly-styled Oppenheimer document, improving end user productivity and document quality while also reducing document risk.
- Oppenheimer Technical Support can deliver swift, comprehensive analysis and resolution of problem documents, resulting in reduced operational costs.
- Requires minimal end user training, which helps reduce training costs.
- Easy to deploy.

Software

- DocXtools for analysis, clean-up and formatting of an individual Word document and for the rapid restyling of Word documents.
- DocXamine for analysis and comprehensive quality control of Word document collections.

Services

- Microsystems Consulting to configure DocXtools.
- Microsystems Solutions Center to assist Oppenheimer with deployment.
- Microsystems Document Emergency Room for the triage of problem documents.

Solution

Oppenheimer engaged Microsystems Consulting to create two different DocXtools toolbars:

1. A User toolbar for attorneys and secretaries that features a “Make Firm Document” button for simple, speedy document reuse.



2. A Tech Support toolbar to provide comprehensive document analysis, clean-up and restyling.

“With our DocXtools ‘Make Firm Document’ button, any user can quickly turn an existing document – regardless of its condition or origin – into a healthy, fully-styled Oppenheimer document,” said Ms. McGuire.

Business Benefits

Streamlined Document Reuse Workflow Mitigates Document Risk

Mitigating the risks associated with document repurposing is critically important to Oppenheimer. But since the process of creating new work product at Oppenheimer typically involves repurposing existing documents, the chances of propagating bad metadata or applying inconsistent branding are considerable.

“The File/SaveAs method was fraught with peril,” says Ardys Moen, Director of Information Technology. “With Microsystems’ help, our attorneys and secretaries are now empowered to repurpose legacy work product into Oppenheimer documents that we provide to our clients with full confidence in their stability and health.”

Comprehensive Document Analysis Software Reduces IT Costs

DocXamine’s document analysis capabilities help Oppenheimer triage documents escalated to its own Technical Support.

“DocXamine allows me to quickly and comprehensively pinpoint document issues and maintain consistent practices across multiple documents. It has saved several hours per day,” says Ms. McGuire.

“Our attorneys and secretaries are now empowered to repurpose legacy work product into Oppenheimer documents that we provide to our clients with full confidence in their stability and health,” said Ardys Moen, Director of Information Technology.

Easy-To-Use Interface Increases Attorney Efficiency

Because it includes embedded intelligence like the one click Smart Style automation, the “Make Firm Document” solution reduced the average time spent repurposing a document from 20 minutes to less than five minutes.

“With the ‘Make Firm Document’ capability, any attorney or secretary can successfully repurpose an existing document into an Oppenheimer document within minutes,” said Ms. McGuire. “And because the required training is minimal, we’ve been able to reduce our training burden.”

About Microsystems

Microsystems is the leader in providing complete, “first draft to final delivery” document lifecycle solutions to the legal and life sciences markets and other document-intensive businesses. The company provides more than 650 clients with an innovative combination of software products, consulting services, and training designed to improve the total document creation, quality control, and delivery processes. Microsystems is headquartered in Downers Grove, IL.

To see a demonstration of how DocXtools can help you improve your document quality, clean-up and restyling efforts, call Microsystems Sales at 630.598.1100 or e-mail sales.inquiry@microsystems.com