

American LegalNet's eDockets

By Curt Meltzer

I have been CIO of three different large, multi-jurisdictional law firms, in addition to consulting with hundreds of firms in over 25 years in the legal technology industry across North America. I have found that every firm has docketing challenges, including policies, compliance and multi-jurisdiction requirements. Successful docketing system implementations combine a rigorous procedural methodology with change management techniques. They must also minimize the effort required by lawyers and secretaries to maintain the database. I have seen many instances when one or more of these requirements are overlooked, and the effort to correct the issues can easily surpass the initial implementation effort.

The docketing process can be highly risky. When a law firm's docketing and calendar workflow is undefined or loosely structured, the firm is left vulnerable — vulnerable to missing deadlines, losing track of e-filings, or submitting out-of-date or unofficial forms. Further, time-consuming paper reporting, inconsistent database and deadline management and a lack of integration with other critical programs (such as time and billing systems, conflicts checking and document management systems) cannot only diminish a firm's workflow efficiency, but also increase its risk.

I have reviewed and implemented numerous docketing systems over the years. With eDockets, American LegalNet has tackled these challenges. eDockets was designed to automate

Curt Meltzer is President of Meltzer Consulting, LLC and has over 25 years of experience in the legal technology industry. Meltzer has worked in litigation support, software training, management consulting (Hildebrandt, Inc.), and as CIO for three large law firms, including Dorsey & Whitney, LLP and Chadbourne & Parke, LLP. He is a member of the Bar of the District of Columbia.

docketing while accessing up-to-the-minute court rules and federal, state and agency forms. eDockets makes scheduling court dates and deadlines more foolproof while allowing attorneys to keep their work and personal calendars current. All of these tasks are executed through an easy-to-grasp user interface. eDockets can be part of a firm's Business Process Improvement ("BPI") initiative. As clients look for greater efficiencies and cost management from their outside counsel, BPI efforts will be critical to a firm's financial success.

EDOCKETS FEATURES

Some of the key features of eDockets are:

- Docket and calendar tracking;
- Court rules sets;
- Multiple options for reporting and notification;
- Integration with Outlook Calendar and Forms Workflow;
- Web 2.0 format;
- Auto Docket e-filing notifications from Case Management/Electronic Case Files ("CM/ECF"); and
- Enhanced security features.

Part of its intuitive nature comes from the Web 2.0 format that allows users to work in eDockets from the office, courthouse or home, 24/7, through an Internet connection. Its flexibility is an enormous advantage not only from an access but also a training point of view. The program's extensive use of straightforward drop-downs and other user-friendly tools speeds training and adoption time for most firms.

eDockets features extensive rules — the program currently has a date calculator and/or rule sets for 50 states. Federal and judges' rule sets are also available.

eDockets integrates fairly easily with other key law firm programs including American LegalNet's Forms Workflow (a library of U.S. federal, state and agency forms), Microsoft SharePoint, and in some states, American LegalNet's eFiling Portal.

NAVIGATING EDOCKETS

With its simple, logical tabs, navigating eDockets is easy for users and administrators. A guide to using eDockets follows.

The eDockets Home Page. From the eDockets Home page, users can open cases through the "History"

box that lists the last 10 edited cases, open or create a case, open or create a client/matter, or access an event through the "Open an Event" field.

Creating Client and Matter. eDockets offers several different ways to create and update client and matter information. The user can either manually edit or enter the applicable client/matter number, or firms can choose to have client and matter data imported into eDockets from a database, such as their accounting system, directly from a flat file.

Creating Cases. Building an eDockets case is a two-step process, and, once created, the case-level view provides a quick snapshot of dockets, events and assigned attorneys. An unlimited number of attorneys and staff members can be listed on an eDockets case or event. This is unlike other programs that limit the number of people that can be assigned to a case.

Time zones are determined by the location of the case. eDockets calendared events will automatically adjust for attorneys located in different time zones. Even if some attorneys on the team are in San Francisco and others are in Washington, DC, they and their assistants need not worry about manually changing time zones in Outlook.

Dockets and Events. Besides the ability to create both court rule-related and non court rule-related dockets and events, firms can take advantage of eDockets' out-of-the-box field design as well as the numerous features that can be tailored to make the product more pertinent for a firm's environment and workflow. For example, the "place" field can be used for the address of an event, and the "description" field can be used to include information relevant to the meeting. This data can then be pushed out to the calendars of the attorneys and staff involved with the case. Another example: attorneys who are not assigned to the case can be added to events, and, conversely, attorneys who are assigned to the case can be excluded from events if they do not wish to receive Outlook notifications or reminders about the event.

eDockets Calendar. eDockets calendared events can be viewed by

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day, week or month. The calendar can be filtered by attorney or team so staff and lawyers can see only the events and deadlines that matter to them. With the correct security settings, attorneys can also check their colleagues' calendars to determine their availability for a particular event or meeting.

Outlook Integration. eDockets integrates with Outlook. Event notifications can be adjusted on the case level or for individual events, and reminders can be added to further customize events for one or more attorneys assigned to any event.

Reports. eDockets offers a fairly rapid report generator that allows lawyers to be more responsive to clients. Reports can also be created for case or matter events, and those reports can be exported as Excel or .pdf files. eDockets is SQL-based, so firms can also use other reporting tools such as Crystal Reports and Microsoft's Report Services. These reports can be filtered and sorted in various ways, even by excluding some people from receiving a report.

Court Rules. eDockets' court rules integration is a critical feature and is updated monthly by a team of licensed attorneys. Court rules are constantly changing, and eDockets maintains up-to-date court rules in all 50 states. Like other components of the product, associating court rules with a case is straightforward. A user only has to enter three or more letters of the court's rule set or code or three or more letters of the

court's name. Then, eDockets' "smart type ahead feature" suggests court rule sets in a drop-down list. Users can feel confident the correct events have been docketed without having to look up every single rule.

AUTODOCKET®. As stated earlier, it is critical to minimize the amount of effort that the legal staff spends on docketing. I have found that with eDockets' AUTODOCKET feature, users can create a docket entry directly from a court's e-filing receipt. This is a unique time-saver. Federal courts now require e-filing, but processing those e-filing court receipts can take a great deal of time and effort. Usually, once the court sends an e-mail, the user must print it, determine the case, open the calendar, log on to PACER, download the relevant document or documents, and then distribute the documents to the right people. If an attorney cannot locate the appropriate document right away, he or she may log on to PACER to print them out again, running up additional costs.

With eDockets, docketing court e-filing receipts is streamlined. eDockets' patent-pending AUTODOCKET feature scans and translates incoming court e-filing receipts. The user need only select a link in AUTODOCKET to convert the information into a docket. AUTODOCKET not only automates docket creation, it also pulls documents from PACER and attaches these files to a docket entry. In addition, notifications and e-mails sent to an attorney's Outlook Inbox will contain links to the PACER files attached to the dockets. For a busy litigator, this feature alone can save hours of time each month.

Attorney Change Utility. A hallmark eDocket feature is the "Attorney Change Utility." One of the greatest challenges firms face with docketing is when attorneys join the firm, leave the firm, take a leave of absence or are reassigned. When changes happen, updating cases is generally time-consuming and tedious.

With eDockets' Attorney Change Utility, an authorized user can easily see which cases need to be re-assigned to which attorney. Users can add, delete or replace attorneys, allowing centralized control for assigning an attorney to a specific case. This type of blanket system makes the process more palatable and reliable than other systems that require more manual changes.

Reminders. With eDockets, users can send an unlimited number of reminders by firm, attorney or case.

The Admin Tool. Another plus for docketing managers is the Admin Tool, which provides behind-the-scenes control for eDockets' security, settings and tools. The Admin Tool allows for creation of groups with specific permission settings, customization of the product, and is easily hidden from the general user population.

CONCLUSION

Docketing and calendaring can be a difficult process that is prone to errors. With eDockets, the process can be streamlined, increasing flexibility and efficiency while saving time and eliminating opportunities for mistakes. The result should be the reduction of risk, increased levels of client service, and greater business success.



Integrated e-Discovery

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All of the above are features that law firms should expect to come standard in an integrated processing solution, but that might not be the position of the vendor. Law firms should diligently review the specifications of any integrated solution they are considering to ensure all required features are indeed part of the platform.

ESSENTIAL COMPONENTS FOR ESI ANALYSIS

In recent years, many companies have developed advanced tools that

supplanted the need to perform a traditional linear review of ESI and thereby substantially decreased the time and cost associated with this phase. Analytical tools have been developed that provide the ability to quickly assess and display intelligence about the data set as well as individual documents within it. And tools are constantly being created and developed to extract as much intelligence about the data set as possible. Yet, certain review and analytical tools can be viewed as essential, especially when a law firm is considering investing in an integrated solution.

A law firm should consider whether an integrated solution provides

the following features for the review and analytics phase of the e-discovery lifecycle:

- **Conceptual Review.** Though some might consider conceptual review as a luxury, the increasing volume of ESI that law firms confront makes this a mandatory feature of an integrated solution.
- **Conditional Coding.** Often during the privilege review process, documents identified as privileged are not withheld and end up coded for production. The common culprit in this situation is generally the tagging or coding

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