



## Schnader Selects CaseLogistix Evidence and Litigation Support Software

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By Mark Allen

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As Director of Information Services for Schnader Harrison Segal & Lewis LLP, a firm that employs about 200 attorneys with offices in Philadelphia, Pittsburgh, New York City, San Francisco, Washington, DC, Wilmington, DE and Cherry Hill, NJ. I, and the complete team of 18 IT professionals, supply our attorneys and staff with the technology tools they need to best serve their clients. The firm serves the complex litigation and transactional needs of both long-established and newly emerging businesses, including clients doing business internationally and in cyberspace.

Wanting to provide a high level of client service, and based on the increasing technology demands and expectations of handling complex litigation, we sought a customizable litigation support software system that would fulfill our attorney's needs. Specifically, our existing technology was beginning to show its age — it lacked necessary customization options, required intense user training to allow for initial "ramp-up" time and, most critical to us, was not based on a Microsoft SQL database backbone — a key technology architecture component and our base requirement for scalability and growth-oriented software.

### Selecting a New and Improved Process

When we first looked to replace our existing litigation technology, the emphasis was on switching to a system that would provide a comprehensive litigation and evidence management technology infrastructure that should accommodate the existing attorney workflow and provide an intuitive interface conducive to use. A Request for Proposal was assembled and sent in mid-2006 by the Litigation Support Manager and myself. From the responses, we selected four products to bring in to for demonstration and evaluation — two very well established and well known products, and two newcomers to the field. Because of the critical nature of the litigation support function, we felt it was important to include Litigation Support, Information Services, litigation paralegals and, most importantly, partners and associates who are most affected by the results of the evidence management process and court deadlines.

At the conclusion of the process, which included several demos by the final two candidates, we chose CaseLogistix® version 5.0 litigation and evidence management software. In addition to the aforementioned selection criteria, our attorneys were impressed with CaseLogistix' extreme ease of use and flexibility. They have found it very easy to customize fields and tailor the application to their existing familiar way of doing things.

### Successful Implementation, Happy Attorneys

Upon the firm's selection of CaseLogistix in Dec. 2006, we assembled our team to establish some structure around our implementation and rollout of the CaseLogistix system. While we did not want to change existing processes that worked well, we were set on streamlining with the goal of successfully introducing CaseLogistix to the firm (you have one shot to make a first impression) and having the firm realize the value the CaseLogistix technology could provide, even short term.

While we expected an initial implementation time frame of more than four months, the actual rollout process, culminating in the setup of a new case exclusively in CaseLogistix, was completed in less than three months. The primary factors integral to making this implementation so smoothly were a combination of relying on CaseLogistix' support and service expertise — they provided a set of best practices for our roll-out, our internal process of managing cases, and the reduced training time we had to spend upon the initial "go live." Right from the outset, the Information Services team set up all network requirements and made sure the right physical resources were in place. At the same time, we made the decision to open new evidence management cases to CaseLogistix first, and then, after any kinks had been worked out, to convert older case files from our old Lotus Notes-based system. This would minimize the time and potential headache involved in historical data conversion. Plus, we were still figuring out what customizations we wanted to make, and how we wanted to set up the system based on user differences.

Once the software was installed and populated with new case data, and our Litigation Support staff was certified (only a two-day training session for certification!), we turned to a CaseLogistix trainer to educate our in-house trainer and legal staff who were to work on this first case on the system. The sessions went very smoothly and swiftly. In fact, we had scheduled sessions of three

hours, but it only took two hours to get the novices to a point where they could be productive. Since this initial session, our litigation support group has taken over all user training and support questions. As with any major new application, we have relied on CaseLogistix support to assist us with unexpected problems and new processes. They have consistently responded to our needs with knowledgeable personnel who are willing to go the extra mile to help us.

Now that we have been relying on CaseLogistix for the past three months, I can say that the willingness of attorneys, even technophobic partners, to use — or at least be open to use — CaseLogistix to assist with complex litigation is rapidly increasing. We are also able now to use CaseLogistix for small cases as well as large ones, because of its ease of setup, use, and collaboration functionality.

CaseLogistix also handles large cases well (provided that the required horsepower is behind it). Our largest and most active case has more than 1.5 million pages, and is growing. With our old solution, we would have outsourced cases that had the potential to grow to more than a million images. While litigation support has the CaseLogistix expertise and resources, paralegals, associates, and increasingly attorneys, are using the application. Much related to who is involved and to what extent internally depends on our clients' willingness to pay for the use of technology tools, the volume and type of electronically stored information we are dealing with, and what kind of resource (time, physical, financial) demands and constraints we might encounter.

### Complete Litigation Technology

With CaseLogistix, the firm's users (100 licenses have been purchased to date) are able to search, organize and annotate documents, customize virtual libraries of documents using the IntelliFolder (folder structure) feature, and capitalize on CaseLogistix' innovative approach to handling native file formats, including .PST files, and tools for annotating and redacting native files. Also, we are able to offer added deployment flexibility by giving our users access to our desktop version, a Web interface, or a hosted solution if that is required for certain cases.

The firm is already experiencing increased productivity from our improved ability to find, review and produce evidence faster. Several useful CaseLogistix v5.0 features we have already been utilizing include:

- *Enhanced Native Review.* The firm can convert e-mails, MS Office documents, images, and hundreds of other native file types so that annotation, highlighting, and redaction can occur;
- *E-mail Support.* We can import Microsoft .PST e-mail via drag-and-drop, and import Lotus NSF e-mail into CaseLogistix with the WayPoint data converter (which enables easy import-export);
- *MetaData Extraction.* We can autocode documents and data using metadata extraction;
- *Bates Analyzer.* We can analyze all specified documents and return a report specifying Bates number gaps, bates number overlaps, and invalid Bates ranges;
- *Unicode Compliance.* We can view, index, and search documents in Arabic, Chinese, Cyrillic, Greek, Hebrew, Japanese, Korean, Thai, Turkish languages, and other non-English character languages; and
- *Document Filters.* We can restrict access to certain folders or files meeting specified criteria on a user, workgroup, or security group basis.

### Conclusion

We have found that CaseLogistix gives us the flexibility we need. The software is intuitive, and easy for attorneys to use. This minimizes training, which saves the firm money. In addition, the time spent on non-billable tasks is negligible; while productivity and the speed of performing tasks has increased, along with an improved ability to find evidence. Even partners who are technophobes are using the application. All of this makes our attorneys and clients happier.

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**Mark Allen** is the Information Services Director of Schnader Harrison Segal & Lewis LLP, and leads an 18-member IT team that meets the technology demands of attorneys, outside counsel and clients, including litigation technologies. The views stated above are Mr. Allen's and are not those of Schnader Harrison Segal & Lewis.