

City of Pasadena chooses Legal Files for comprehensive case management and document management

Background

Representing the City of Pasadena with the utmost professionalism and providing the highest quality legal services is the Office of the City Attorney/Prosecutor. Comprising three divisions—civil, prosecution and claims & insurance—the Office manages all litigation and transactional matters handled by in-house and outside lawyers. Managing all civil and criminal legal matters for the city, the Office advises the city council, city advisory bodies, commissions and committees, city departments, the Rose Bowl Operating Company, the Pasadena Convention Center, and the Pasadena Community Access Corporation.

The Challenge

In 2005, the Office of the City Attorney/Prosecutor was informed by its IT department that its current database information and storage solution was being phased out and to look for a new solution.

Later that year, the City issued a formal request for proposal seeking the professional services of a qualified and experienced software vendor to provide case management and document management software, system implementation services, data conversion and integration services, end user and technical support training, and ongoing system maintenance and support services. After evaluating all proposals, the City selected Legal Files.

Working in partnership with the City, Legal Files Software, Inc. provided project management, data conversion and training services, along with the licensing of its software. After advance planning, training and testing, the migration was completed offsite over a weekend with the assistance of the City's IT department, followed by additional training for the Office's staff.

The Results

The Office has used Legal Files since January 2006. "Legal Files is our case management database," explains Janet Darnall, Administrative Legal Secretary with the Office of the City Attorney/Prosecutor. "All of our files exist in that program. All word processing and calendaring are done within Legal Files."

Legal Files helps the Office "to turn out a consistent product in a timely fashion," Darnall said. "It makes it easy to locate and edit documents quickly. We had previously been using a document management program with some of the same capabilities," she said; "however, Legal Files has many additional and, in some cases better, functions that give us a very wide range of

(more...)

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Janet Darnall,
Office of the City Attorney/Prosecutor
City of Pasadena

Customer Profile

City of Pasadena Office of the City Attorney/Prosecutor

- Government agency
- Responsible for all civil and criminal legal matters for the city, including all litigation and transactional matters handled by in-house and outside counsel
- 19 users

Challenge:

- Replace a system that was no longer being supported
- Locate a system that could manage multiple matter types
- Convert existing data from separate case management and document management systems

Solution:

- Implement Legal Files management system
- Migrate documents and HP3000 hierarchical data files to a relational database management system

Results:

- Save time by automating the manual tasks of case and document management
- Provide greater efficiency and accuracy in tracking and calendaring
- Capability to fully integrate with industry leading desktop applications, such as Microsoft Office.

capabilities that we didn't previously have. In particular, Legal Files gives us the added capability of group notices of calendar and to-do's that we didn't have before."

Legal Files' standard functionality includes a Group Calendar Wizard which enables a user to schedule a calendar event for multiple users at one time, and comprehensive task management of individual to-do's (or tasks), both private and matter-related—all from the same index. Legal Files also offers a case view of all to-do's for all users assigned to a particular case or matter.

Managing Volumes of Email

One particular feature that Legal Files offers – Save to Legal Files – is of great value to the Office, according to Darnall. The basis for the Save to Legal Files functionality is the system's one-of-a-kind integration with programs offered in Microsoft Office®, including Outlook (e-mail and calendars/tasks), Word, Excel and Internet Explorer, enabling Legal Files to seamlessly work in concert with these popular desktop applications.

A Save to Legal Files icon is placed on the user's Outlook Toolbar. Clicking on the Save to Legal Files icon opens a file selection window where the user simply selects the matter where the e-mail should be copied, and Legal Files automatically copies the message (with attachments) to the appropriate file. Because of the volume of email the Office currently sends and receives Darnall said, the feature quickly became an Office favorite.

Going Green – with Legal Files

"We are making every attempt to go green," Darnall said. "We have identified several file types that we designate as 'E-files' within Legal Files, and all materials are scanned into them. Hard copies, for the most part, are discarded unless it is necessary to keep a 'wet' signature. However," Darnall said, "even in that case, we are now able to reduce the paper file to a minimum."

One way Legal Files makes it easy to create an electronic file is its convenient Drag & Drop Zone functionality. It works like this: Legal Files places a "Drag & Drop" zone on a user's desktop, allowing users to quickly drag and drop a document (or an entire file) into Legal Files. Once the document is "activated" over the zone, Legal Files prompts the user to categorize it (i.e., to-do, mail, document or expense) and select the appropriate case or file within Legal Files in which to store and manage the document.

Outstanding Support

Looking past the functional aspects of the software, Darnall is also pleased with the people behind the software, the Legal Files team who back up the product. "My personal experience has been extraordinary," Darnall said. "The individuals I have had interaction with for technical support have been tremendous. "

Bottom Line

"Go for it!" Darnall said, addressing public sector legal departments which may be considering Legal Files. "The software has so many functions that are beneficial to our Office, and three years later we are still discovering more ways to apply those functions."



Managing what matters to you.

(800) 500-0537
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