

Rheem Manufacturing Company chooses Legal Files for its simplicity and user friendliness

Background

A privately held manufacturing company, Rheem is a leading global producer of heating, cooling and water heating products. Respected for reliability, Rheem products meet or exceed rigorous industry and regulatory standards for quality, reliability, efficiency, and air and water quality. Headquartered in Atlanta, Rheem has facilities in Alabama, Arkansas, California, Canada and Mexico, as well as other locations.

The Challenge

“We had an expanding volume of files,” explained Claims Manager Lisa Ricca. “The largest portion was product claims. We also had lots of photographs which were related to product claims that we couldn’t attach to our existing systems, or were difficult to attach. They were filed separately. We were receiving an increasing number of documents via email, especially documents for intellectual property concerns. We would receive multiple patent and trademark documents attached to one email. There wasn’t an easy way to file and retrieve those. So we ended up printing the electronic information and putting the hard copies into paper files. We were physically running out of space.”

The majority of documents was centrally filed in the Montgomery, Ala., office, Ricca said, but could also be in other facilities, along with photographs, spreadsheets or email messages, making it difficult for everyone to have access to the information they needed. “It was a case of, ‘I have this, let me FedEx it to you.’ There was the wait,” she said, “and, of course, the expense.”

The Results

Rheem implemented Legal Files in Atlanta and Montgomery and then rolled out Legal Files to other offices. In addition to the licensing of its software, Legal Files Software, Inc. also provided implementation assistance and training. Legal Files Software, Inc. also completed two data conversions and a document conversion for the project. Today, Legal Files users at Rheem include administrative assistants, technical managers, risk management attorneys, engineers and the company’s general counsel.

“Legal Files is our virtual file cabinet,” Ricca said. Rheem’s Law Department uses Legal Files as a central depository for all kinds of documents—contracts, policies, procedures, as well as photographs, emails and attachments. “We

“Legal Files is customizable. You can gather and capture any information you want. The other products we looked at were all template-based, and were difficult to customize.”

Lisa Ricca,
Rheem Manufacturing Company

Customer Profile

Rheem Manufacturing Company

- A leading provider of water heaters, gas furnaces, heat pumps, air conditioners, air handlers, pool heaters, boilers, indoor air quality products
- Law Department involved in product claims, contracts, leases, and asbestos, environmental, employment and intellectual property, etc.
- 15 users

Challenge:

- Lots of paper files; running out of filing space
- Existing systems couldn’t talk to each other; report generation was time consuming
- Corporate legal professionals in multiple locations had no immediate access to necessary data

Solution:

- Implement one, customizable system to meet all requirements, including reports
- Provide information instantaneously to all users

Results:

- Improve internal record keeping
- Quickly generate reports
- Operate more efficiently as a team

(more...)

(cont'd from front...)

still maintain all the data we ever did,” Ricca said, “but, as an example, for our asbestos portfolio, we haven’t added to our filing cabinets for two years.”

Since Legal Files can store and manage an unlimited number of documents, cases and files, “now, we don’t worry about running out of space,” Ricca said.

The professionals at Rheem also appreciate Legal Files’ simplicity, Ricca said. “We particularly like how Legal Files works with the Microsoft apps,” she said. Legal Files’ integration with Microsoft Office is one of system’s most notable features. Email, documents, photographs, scanned images, spreadsheets and presentations, etc. can be saved to Legal Files directly from the Microsoft Office application via a “Save to Legal Files” button. “It’s simple, user friendly,” Ricca said. “You click on a button and it goes into the database.”

Reports

Legal Files has also made reporting easier. “Legal Files is customizable. You can gather and capture any information you want,” Ricca said. Consequently, you can report on just about any information you want. “If I need to see how many open claims we had in a specific month, or get data on a specific scenario, or for a particular location, I can easily pull that information from Legal Files.”

To capture and report on the information it needed, the Law Department made extensive use of Legal Files’ custom windows feature, creating a product liability custom window, an environmental custom window, a lease custom window and a contract custom window. In addition to providing the ability to design windows that meet specific needs, the Custom Windows feature also provides flexibility to change when data needs change.

Email Notification Service

Now that Legal Files has helped the Law Department more efficiently manage its internal documents and reduced its paper flow, Rheem is looking to Legal Files to help manage contracts and leases.

To help achieve that end, Rheem has just licensed Legal Files Email Notification Service, Ricca said. The Notification Service will enable the department to establish milestones and create emails for any number of key dates on custom windows (such as lease or contract reviews, renewals, deadlines, expirations, etc). The service will send an automatic e-mail notification for the milestone dates; plus, an unlimited number of alerts can be created.

Bottom Line

Ricca would encourage anyone in the market for a matter management system to consider Legal Files. “It certainly worked best for our needs and our IT requirements,” she said.



Managing what matters to you.

(800) 500-0537
www.LegalFiles.com