

## User friendly and a breeze to use, Legal Files makes adapting to a new system easier, state agency finds

### Background

The West Virginia Department of Environmental Protection's mission is to promote a healthy environment. Some of its major divisions are tasked with protecting air, land and water, as well as an office which regulates the oil and gas industry. Its Office of Legal Services (OLS) represents the agency in permitting and enforcement actions before administrative boards, circuit courts and appellate courts, and provides counsel to DEP offices on regulatory and legislative matters. OLS works with all divisions and offices in the Department to assist with the implementation of regulatory programs.

### The Challenge

"We were using an outdated system and it was costly to update," explained the Office's Lynn Dunlap. Additionally, the Office's old set up did not allow for centralized management or tracking of documents, email messages, time entries, notes and other legal matter related items.

"Our office is a little different because we needed a system that could not only handle all kinds of cases and projects, but we also have attorneys who need to bill back time to each of our divisions, sections or sub-sections," she said, adding "and each of those has different reporting requirements."

Lynn began with a search of the Internet and talked with several different companies. "One day, I saw a video demo of Legal Files," she said, "and it had everything we needed." Following several online demonstrations with a Legal Files account manager, and in consultation with the agency's IT Department, OLS selected Legal Files to meet their system requirements.

### The Implementation

"We were as lost as a ball in high weeds," Lynn said. "We weren't sure exactly what we wanted or how we wanted it." Working with Legal Files as partners in the process was critical. "Our Legal Files project manager/trainer really was great. She was knowledgeable and fun, and we worked together to customize the system to our needs. She was also very helpful in building reports with us," Lynn said, adding that Office employees acquired quite a bit of knowledge in the process. "Now, I want you to understand that we're not masters with reports, but we're pretty darn close," she said proudly. "We've only had to call

(more...)

*"Legal Files is the product for you. You can customize it. It has everything you need."*

Lynn Dunlap,  
WV Department of Environmental Protection

### Customer Profile

#### Office of Legal Services, West Virginia Department of Environmental Protection

- Providing all legal services to the agency, works to promote a healthy environment by offering litigation services and advocacy to further state and federal environmental laws, rules and regulations

#### Challenge:

- Used outdated system, which was costly to update
- Sought a system with case management, including time tracking
- Required robust reporting tools to meet a wide and divergent group of requirements

#### Solution:

- Implement one, customizable system to meet all requirements, including reports
- Work as partners to build a system as unique as their requirements

#### Results:

- Improve reporting ability, providing "big picture"
- Work more collaboratively
- Operate more effectively as a team

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(Legal Files) once" since implementation was completed, she added.

"We thought it would be tough and scary to learn a new system" Lynn continued. "People don't like change. And it *was* scary at first; but Legal Files is so user friendly, it's such a breeze to use and, before you know it, you come to love it.

Nicole "Nikki" Howard, who uses Legal Files every day in her position at the Office of Legal Services, echoes Lynn's sentiments. With Legal Files, "it's easy to run a report. It's easy to run a query. It's easy to search and pull up a document, I can find a document in little or no time," she said.

Based on her experience with other systems, Nikki said that she had found them limited, especially when it came to querying and searching. "There isn't a limited number of fields, like some systems," she said. "Legal Files seems to offer a limitless number" of search fields."

### Customizable Reports and Other Benefits

Now the Office is able, with its new Legal Files system, to quickly generate monthly reports for each division or section of the agency, and still fulfill the requirements of each. "Legal Files gives us the ability to easily see the types of cases DEP is handling, the number of cases, as well as determine the related costs," Lynn said. "If we need to know the number of active cases in a particular area, or how many items we cannot bill, Legal Files can help us do that too."

The Office uses Legal Files for a lot more than just reporting. Case management is a more collaborative effort. Everything is in one place, which may seem like a simple idea, but the impact is huge because it means that you create a more collaborative environment. "Everyone has access to the information they need," Lynn said. OLS, which handles its own litigation in house, uses Legal Files case management functionality daily to help manage a wide variety of its workload, including administrative appeals, circuit and district court cases, collections of penalty, enforcement cases and research projects.

With Legal Files, team members can more easily re-use work product and even access the system from home when needed. "We have a single father who works here in the Office," she said; "Accessing Legal Files from home gives him some much needed flexibility."

### Bottom Line

When asked what she would tell someone who's thinking about purchasing Legal Files, Lynn said, "This is the product for you. You can customize it. It has everything you need. We really love it."



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