Open Text Records Management, LegalKEY Edition
A complete legal-centric approach to managing all records

The Business Challenge

With electronic documents and email growing at such an astonishing rate — 40 percent annually in most organizations according to a recent Gartner research report — an effective and efficient records management system is no longer a luxury. Adding to the mix is the new emphasis on firms to prevent or disclose client wrongdoing and to protect and act on behalf of clients in accordance with such regulations as the Sarbanes-Oxley Act, the ABA Model Rule 1.13, and ABA Model Rule 1.6 (Confidentiality of Information).

In today's increasingly competitive business environment, law firms are striving to strike the perfect balance between increasing revenue and profitability while maintaining a strong ethical and compliant legal records position.

Without a regimented process for controlling and tracking both physical and electronic records, firms increase their exposure to serious repercussions, including the following:

Increased Labor and Storage Costs

With traditional records management requiring such a significant investment of both staff and financial resources, and with labor costs rising, manual, labor-intensive and inefficient records management poses a significant impact on the firm's bottom line. Additionally, storage costs are directly related to the quality and efficacy of records management processes. Reliance on traditional records management approaches equates to less than optimal physical and electronic records storage costs.

Hindered Ability to Tackle Email Management Challenges

The volume of email in law firms today continues to rise at a staggering rate. So to does the need to manage email and associated attachments in a cost-effective, efficient manner. Without proper records management principals in place, firms are exposed to risk, lost opportunities, and higher storage costs.

Threat of Non-Compliance With Regulations

- Law firms today must pay close attention to records keeping practices, policies, and procedures. Failure to do so can result in embarrassment for the firm and, worse still, to the clients it serves.

- With unprecedented pressure to track and account for files of all types – whether physical or electronic – firms need a comprehensive, proven system that enables staff to search for, locate, access, and control records.

Unparalleled Sophistication, Flexibility, and Ease-of-Use

Open Text Records Management, LegalKEY Edition (LegalKEY Records Management) takes a content-driven, legal-centric approach to records management. Instead of focusing solely on physical media, LegalKEY Records Management provides for complete management of all information regardless of source of origin or media type, including email, images, electronic documents, voice mail, and facsimiles.

The Legal Industry's Most Sophisticated Search Engine for Records Management

LegalKEY Records Management features a powerful, flexible, and accurate search facility that provides firms with the ability to discover all files, subfolders, and documents with a simple keyword search and then hone the result set to view all associated information. Based on strict security profiles and record status, it is then possible for staff to request, reserve, or modify the information.

It operates much like a library system — checking records in and out and keeping track of individuals waiting for records. As a productivity tool, it also enables staff to create files, inserts, and documents from standard lists and then to electronically scan file and insert barcodes, simplifying time-consuming tasks such as packing boxes, running off-site transfers, requisitions, check-out processes, re-files, and conducting office inventories.

These capabilities, in combination with the built-in spellchecker and thesaurus, improve departmental efficiencies by accelerating the recording process and eliminating data integrity issues associated with manual records management practices.

> "Foley & Lardner LLP selected LegalKEY Records Management as a critical tool in its first-ever national approach to records management. LegalKEY Records Management will be used to manage all physical records."
>
> **Beth Chiaiese,**
> Director of Conflicts and Records, Foley & Lardner

Legal-Specific Attorney Desktop Interface

The LegalKEY Attorney Desktop module gives users a complete view of everything in the client/matter index, both electronic and physical. It provides end-users with limited and controlled access to the records management system. Because the Attorney Desktop is Web-based, it eliminates the need to install updates on each desktop, thereby insuring that everyone in the firm is always utilizing the most up-to-date software.

The Attorney Desktop module allows end-users to:

- Request, view and select files from their desktops;
- Request delivery of physical items from the records center;
- Search, view and print indices and imaged records;
- Request creation of new items;
- Perform global searches; and
- Transfer records between users.

Single System to Manage Both Electronic and Physical Records

LegalKEY Records Management provides for complete lifecycle management of all knowledge assets regardless of format. Whether the source of origin is physical or electronic, including email, scanned images, Microsoft® Office® documents, or other digital forms, work product is managed consistently and in accordance with industry best practices from creation through to ultimate disposition.

Facilitates Sound Retention Policies

LegalKEY Records Management provides for the establishment of retention schedules for all files, regardless of media or source of origin. Using a flexible approach, files are assigned lifecycle management rules that allow a firm to enforce its approved records management program across media and item types. A consistent approach to movement, destruction, or transfer is streamlined based on content and subject.

Key Component of Open Text Legal Solutions

LegalKEY Records Management provides for the comprehensive management of both physical and electronic records in a client/matter-centric approach.

Solution Highlights

As part of Open Text Legal Solutions, LegalKEY Records Management provides law firms with a single interface for the comprehensive management of all electronic and physical information related to a client or matter, regardless of source of origin or media type.

- Legal-Centric and Highly Intuitive Attorney Desktop Interface
- Flexible and Powerful Records Policy Support
- Seamless Integration with Existing Systems

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Sales	Corporate Headquarters	European Headquarters
www.opentext.com sales@opentext.com	275 Frank Tompa Drive Waterloo, ON N2L 0A1 Canada	Technopark 2 Werner-von-Siemens-Ring 20 D-85630 Grasbrunn Germany
North America Sales 1 800 499 6544 International Sales 1 8004996 5440	Phone: +1 519 888 7111 Fax: +1 519 888 0677	Phone: +49 89 4629 0 Fax: +49 89 4629 1199

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