CUSTOMER FACT SHEET

Company

Fortune 500 company in the Technology industry.

Technologies

Alfresco Enterprise

Alfresco Workdesk

Office & Integrations

Solution

• Zia's Secure ECM for Legal

Results

• Worldwide Adoption by Over 1200 People in Corporate Legal

• Millions of Files Moved From Shared Drives

• Easy-to-Adopt with Virtually No User Training

• Integrated with Office and Email Tools

The Company

The corporate legal department for one of the world's largest technology companies.

The Situation

The corporate legal department consisting of over 1200 people worldwide handles millions of documents a year, from contracts to mergers and acquisitions documents, to intellectual property filings and more. When the company contacted Zia to review their project, documents were stored in email systems and in shared drives. These documents were hard to search and find, lacked proper version control, and were difficult to share both internally and externally. In addition, major security concerns existed around email accounts being hacked, leaving proprietary information exposed. However, users liked the ease of use with this method of storing and retrieving their own documents.

The company had twice previously attempted to build a complete content management solution themselves, however, both projects failed to meet their needs of control, compliance, security, and simplicity. In addition, they had reviewed virtually all of the traditional ECM vendors on the market, but again did not find a product that met their needs.

The Process

Zia Consulting began the project with a discovery and process assessment. Initially, three departments within corporate legal were assessed for ECM solution implementation. Once the right department was identified, Zia began to build a roadmap for the project which detailed the assessment findings and Zia's agile project delivery method. Ultimately, Zia and the customer chose the implementation and customization of Alfresco Workdesk with Alfresco Enterprise for the project.

The Solution

Zia began to build a "Secure ECM for Legal" solution with the goal of being feature rich yet easy-to-use, with little to no training required. Within Alfresco Workdesk, Zia created multiple roles to define access to information within the ECM system. These roles were highly customized by department and user type. A set of rules and behaviors were created to build a management process without workflow--in essence, the "heavy lifting" happened behind the scenes. Context menus were built with the most common actions provided and an organized taxonomy was created for each group.

As it was especially important to the company that the content management tools work in the same manner their employees did, having email and desktop software integration was critical. Utilizing Alfresco Workdesk features, users were able to email their documents directly into the repository as well as drag and drop them in from the desktop or other files. From a simple form, users were able to quickly create new projects and send alerts, set statuses, and kick-off processes.

On the system administration side, upgrading the Alfresco software was simplified as the user interface was configured rather than customized. Zia applied several major upgraded features to the complete solution without any impact or delay to the business users.

The Results

The result of the project was a smart, simple, and effective enterprise content management solution. Upon project launch, the corporate legal team was able to continue to use the same tools they were previously using to manage documents such as Office, Adobe, and Email--but, they now had the power of a content hub behind them. Use of the system did not require substantial training as requested by the company; instead, Zia produced 3-minute videos with succinct demonstrations.

With Zia's Secure ECM for Legal solution, the company saved a substantial amount of time as projects were kick-started and tracked in a timely manner. They also saved money by increasing productivity and decreasing duplication of effort and mistakes. Most importantly, Zia was able to meet the project security needs without sacrificing ease-of-use.

This solution was adopted by the corporate legal team worldwide with now over 1200 users on the system; millions of files were moved from email and share drives into the system which properly stored and tracked important documents.

Benefits of Secure ECM for Legal Solutions

1 Increase User Adoption

- Dynamic, Role-Based Matter Management

- Office and Email Integration

- Simple Internal and External Collaboration

2 Enhance Productivity

- Templates for Case Initiation

- Advanced Workflow with Tasks, Reminders

- Mobile Matter Management

3 Compliance and Security

- Automated Records Management

- Secure External File Sharing

- Enterprise Search/Discovery