

When a firm struggles with a technology solution, one that is critical to its business and reputation, you know it's time to switch.

Read why Virginia-based law firm Kaufman & Canoles abandoned not only its document comparison but also its PDF management solution in favor of DocsCorp to better manage and streamline business-critical workflows.

KAUFMAN & CANOLES

Kaufman & Canoles ends document comparison frustrations by going with compareDocs from DocsCorp

Tracing its origins to 1919, Kaufman & Canoles has developed its business law practice over the years to become the largest law firm headquartered in southeastern Virginia. With offices in Norfolk, Virginia Beach, Newport News, Chesapeake, Hampton, Richmond and Williamsburg, the firm serves international, national and regional clients needing assistance in a broad range of legal specialties.

The business challenge

The firm was struggling with its document comparison software in terms of reliability and stability. That's a major problem when your firm does between 50-75 comparisons daily. The application was constantly freezing and crashing workstations, and this was taking its toll on the firm in terms of employee productivity and morale.

Sandi Stovall had just joined the firm as Chief Information Officer from another law firm, which was using DocsCorp's software. Sandi was very familiar with DocsCorp's compareDocs and immediately recommended the firm set up a pilot group of power users to evaluate compareDocs as a possible replacement.

The group reported their findings to the firm at the conclusion of the pilot. The overall consensus was that compareDocs was a superior product on a number of fronts: it was stable; the user interface was clean and simple to use; comparisons were accurate and fast. Another bonus for the users was the out-of-the-box integration with Autonomy iManage, which provided some new workflows.

Sandi recalls "we really liked compareDocs ease of use. We especially liked how we could right-click on documents in iManage, compare the documents and email the results. It was easy and fast. We also loved how it showed us the original and modified side by side."

Our solution

The lawyers at Kaufman & Canoles were impressed with compareDocs and the speed and accuracy with which it handled Word-to-Word comparisons. The compareDocs approach to document comparison is unique in a number of different ways.

It is designed to be simple and intuitive to use, minimizing training and upskilling. It integrates with

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all the applications that law firms like Kaufman & Canoles use on a daily basis—Autonomy iManage (DMS), Adobe Reader and MS Office. This out-of-the-box integration streamlines workflow, eliminates complexity and increases productivity.

compareDocs provides law firms with the flexibility to output Word-to-Word comparison documents as a traditional redline, or as a track changes “go forward” document. This new approach results in a more efficient document review process.

The compareDocs comparison engine analyzes the document text layer only. It does not convert the document to another format as part of the comparison process. Converting documents to another format means that document formatting will be lost. compareDocs by contrast maintains document integrity and fidelity at all times by working within the text layer only—not the presentation layer.

Once the changes have been identified within the text layer, compareDocs outputs the detected changes directly into a new Word document. Users can accept or reject the proposed changes using MS Word track changes functionality. This third document now becomes the next iteration of the document, which users can edit, modify, save into their document management system or email to the client.

In addition to MS Word comparison, compareDocs enabled Kaufman & Canoles staff members to compare PDFs. compareDocs compares PDF documents natively, ie it doesn't convert the document to another format as part of the comparison process. This produces a faster and more accurate comparison result.

Other benefits

All of this occurred at the time the firm was considering renewing its Adobe licenses. “We used Adobe Standard to fill out online forms and when we were faced with the next upgrade, we switched to formFiller. It was an easy decision.” And so the firm abandoned its Adobe Acrobat Standard licenses in favor of pdfDocs and formFiller from DocsCorp.

Kaufman & Canoles works with a significant number of online government, client and internal forms. formFiller enabled them to fill in, edit, email and sign forms, which they could save to a Windows file system or directly into their Autonomy iManage document management system, reducing administration, delivery times and input data errors.

pdfDocs is a project-centric PDF management application that integrates with MS Office, MS SharePoint and Autonomy iManage to better manage business-critical documents more efficiently through enhanced workflows. It provided Kaufman & Canoles users with PDF and PDF/A creation, collation, annotation, redaction, file splitting and OCR capability.

Sandi recalls that the Binder feature in pdfDocs was a revelation. “Our lawyers are delighted with the ability to use pdfDocs to create large and complicated binders for closings. It gave them a functionality they didn't have before, and it's easy to use.”

The Binder capability in pdfDocs enables users to automate the process of bundling vast amounts of documents relating to a project into a single, easily-navigated document, complete with a Table of Contents, cover page, links and bookmarks.

In summary

What started out as a document comparison swap out resulted in the firm also replacing Adobe with DocsCorp's products—compareDocs, formFiller and pdfDocs. The applications integrated with the firm's Autonomy iManage document management system to provide additional functionality and capabilities as well as enhanced workflow and productivity.

| KEY BENEFITS |
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| Create PDF and PDF/A documents |
| Reduce time needed to create Closing and Deal Books |
| Secure documents with encryption, metadata removal and redaction |
| Streamline the document review process by allowing users to work on the third iteration of the comparison document |
| Expand comparison capabilities to cover paper-based, image-based and text-based comparison workflows |
| Enhance productivity and workflow with Autonomy iManage integration |

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