CaseEnsemble Feature Set

The unusually rich and deep feature set offered by CaseEnsemble is truly unique in the industry. The system provides all of the standard features common in the Legal Extranet world, such as case profiling, document storage and workflow, task management, event tracking, case calendaring, bulletin board, email notification when items are added to the system or when time-bound items are coming due, and several prepackaged and customizable reports and search functions. But the true power of CaseEnsemble is contained in the "under-the-covers" capability to add new data fields to the system virtually instantaneously, powered by the best-in-breed development process known as "Document Management and Control," or "DMC" for short.

The DMC allows a system administrator to add new fields to your implementation at any time. Thus, unlike other software providers, when clients need to track new fields quickly in their Legal Extranet, they are empowered to add these fields. This incredible feature totally eradicates some of the highly frustrating aspects of working with many software providers – hearing answers such as "I'm sorry but we cannot track that field," "We can do it, but it will have to wait until the next software release" or "We can do it, but it will require custom programming at a substantial cost to the client and can be done in several weeks or months."

The DMC delivers yet another terrific feature to CaseEnsemble clients. Because the DMC manages all system data in a generic and consistent manner using high-quality document management concepts, the user interface is virtually identical regardless of which module a system user is working in. Because CaseEnsemble is delivered via the Internet, and also provides a consistent and friendly set of system screens, client training needs are generally very low and clients are able to get up and running faster than they can generally imagine.

In addition to these truly unique and differentiating features, CaseEnsemble delivers the following other features as part of its basic Legal Extranet delivery.

Case management and profiling. CaseEnsemble provides a broad set of matter profiles to assist clients in managing their specific type of legal cases. Among the many matter profiles available are product liability litigation, commercial litigation, labor and employment litigation and EEOC charges, intellectual property disputes (both patent and trademark), and government investigations/subpoenas. Within each type, clients can track a plethora of information related to the general case information, the court, plaintiff and defense counsel, the plaintiff and defense individuals or entities, details on the plaintiffs' alleged damages and injuries, government agencies involved, the nature of ongoing settlement discussions and case narratives. All of these fields are configured in the appropriate manner, and selection fields are preloaded with all appropriate selections. But, if clients have additional needs beyond the set of fields provided in the base implementation, the DMC module also delivered with the base CaseEnsemble package allows clients to further enrich the available field set to whatever extent is needed to supp ort their legal management needs.

Document storage and workflow. CaseEnsemble delivers a robust module to help clients store, collaborate and manage documents related to their specific cases. Clients can add documents of virtually any type to CaseEnsemble for collective review and consideration. As documents are added, clients have the option, if they so choose, to assign codes or keywords to documents to facilitate easy retrieval using one of three easy-to-use search engines that are described below in more detail. And, CaseEnsemble also assures clients that their documents are secure via a unique security module. This allows clients to define exactly which individuals can add, view, alter or delete documents, so all security concerns related to the availability of documents to and among team members can be easily accounted for within the system.

The software also delivers a robust workflow package. Documents enter the system in a "draft" format, and then are moved through the system through stages such as revised, finalized and annotate. As the documents move through the system, the CaseEnsemble email engine can provide some or all system users with updates on documents based on the events of interest, e.g., when documents are added to the system, when they change workflow status, etc.). Once documents are added to the system, the highly flexible search engine allows authorized users to press a button to view all the documents they are authorized to see, or only those documents composed by the individual users. This allows all the system users, both those at the client and law firm locations, to quickly locate and review documents as they are developed in support of the client's legal needs.

Several targeted search functions are also delivered by CaseEnsemble to help clients quickly and nimbly find their hosted documents. Clients have the ability to search against the document name, the keywords (coded values) they assign to a document, or against the full text of the document itself. These three options allow all documents to be located in an efficient and timely manner.

Task management. CaseEnsemble allows clients to track and manage all the tasks and "to do's" associated with their legal matters. Tasks can be entered in the system and assigned to one or many members of the legal team along with a due date and description of the activity to be completed. Individuals assigned to the tasks then have the option of marking them as completed at the appropriate time. The CaseEnsemble email notification engine provides the ability to create "tickler" notification when tasks are coming due or when they are overdue. The email engine also can notify legal team members when tasks are completed to facilitate quick and timely review of the task deliverables (e.g., documents). As in the other modules, the DMC development methodology allows the common CaseEnsemble features such as the security engine to govern who can see which tasks, and the CaseEnsemble search engine to provide numerous methods of viewing pending tasks, completed tasks, all tasks, or tasks about to come due or overdue.