

custodian 
for legal

SOLUTION IS NOW CALLED

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FOR **CORPORATE**
LEGAL

Enexis Netbeheer transforms legal knowledge & matter management with **Custodian for Legal** from **Transform Data International**

Enexis, one of the three leading grid operators in the Netherlands, has turned to Repstor Custodian for Legal to transform knowledge and matter management within its legal operations.

The Dutch network operator was looking for a user-friendly matter system to simplify all matter creation and management within the legal department. The new system had to fulfil several requirements.

All information would need to be accessible primarily via Microsoft Outlook, an application lawyers use every day and are very familiar with. Enexis Group also favours Microsoft 365, including SharePoint, as its chosen platform for document storage, archiving and retention management. So legal professionals needed to be able to classify and manage legal and other documents within this environment and archive them in a way that is compliant with strict rules on record lifecycle management, including eventual deletion.

It was also important that legal professionals would be able to call up complete matters on demand. This meant being able to store both documents and communication (mostly by email) within the matter and to be able to quickly access all linked content as required.

Automatic compliance, flexible access

Transform Data International proposed Custodian for Legal from Repstor, a solution designed with and for legal professionals to deliver intuitive and controlled matter management from within everyday Microsoft 365 applications, including Outlook and Teams.

The solution fulfilled a number of other important criteria, too – including controls over where data could be stored, to ensure GDPR compliance, and its security. All data is stored within Enexis Group's own Microsoft 365 environment, which is used widely across the organization and is hosted in European data centres. User management is linked to devices, and employees can access and use all Microsoft applications with a single log-in. This allows the legal department to work flexibly and securely from anywhere, with the option to work offline if needed.

“ Custodian provides good support for our legal function's daily work, allowing team members to work more efficiently and effectively. ”

Jerry Heijstee, Process Specialist at Enexis.

Custodian for Legal allows full user flexibility, while ensuring required information management controls. All changes in documents and matters are registered, so team members can view the progress of either a specific document or an entire matter.

As Microsoft 365 / SharePoint is Enexis Group's default choice for storing documents, multiple users can now even work simultaneously in one document using the 'co-author' function. Automatic version management provides the ability to look up a previous version of a document, or review the differences between the versions. The full lifecycle as well as the latest status of a matter are visible via a timeline view.

Keeping track of emails

As a lot of Enexis Group's legal communication takes place via Outlook, email management was a critical consideration in the choice of matter management solution.

Functions such as the ability to save individual emails, attachments, or entire conversations make life much easier for both legal professionals and information managers. Custodian for Legal also provides the ability to automatically save outgoing and incoming emails to the corresponding matters.

Reporting

All corporate legal teams are expected to be able to demonstrate and keep honing their value to the business. So Enexis Group's legal operation needed good, granular insight into the throughput of work and volumes of documents its team handles, and how this varies over time. From the new system, it was looking for good insight into the number and type of matters going through the system, and the make-up of workloads by matter type. Transform Data demonstrated that, by making use of standard SharePoint elements, which integrate out-of-the-box with Microsoft Power BI, it would be easy to deliver all desired reports with the company's own BI Team, gaining extensive insights that would inform appropriate adjustments to matter or resource allocation where necessary.

User acceptance

Thanks to Custodian for Legal's tight integration with popular applications that Enexis Group's people already used every day, the new system achieved 100 per cent take-up and user acceptance very quickly and has been met with great enthusiasm across the legal department. Due to COVID-19, training and guidance was provided online. Enexis Group organized a weekly Custodian consultation hour (via Teams), allowing team members to ask questions and share tips with each other. Transform Data took part in the consultation hour to ensure that all questions could be answered as needed.

Remote working has even had a positive effect on the implementation.

The Custodian for Legal system has now been fully integrated and the data in Custodian is being analyzed to support broader management objectives. For example, trend analysis and real-time Power BI reports are providing new organizational insights into the types of legal work its internal team engages in and how this breaks down, aiding budget, time planning and potentially also risk mitigation.



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