Law, Snakard & Gambill, P.C. Modernizes with Worldox DMS

*By **Ranita Smitherman,** Personnel Manager, Law, Snakard & Gambill, P.C - July 1st, 2013*

Challenge:
To find a reliable and affordable DMS for a law firm with critical needs for full text searching capabilities, integration with WordPerfect, disaster recovery and remote access.

Solution:
Implementation of Worldox solved a number of the firm's problems. Its add-on, Worldox/Web Mobile, allows users to have remote access to documents from any Internet connection. Worldox also provides features and integrations such as support for WordPerfect documents. It was also the most affordable DMS option. The firm saved between $30,000-$90,000 by choosing Worldox over high-priced competitors.

Result:
Worldox is valued as a great product and one of the best assets of the firm. Staff members have more flexibility and remote access, enhancing daily operations.

A document management system (DMS) is the lifeblood of a law firm. If the DMS is broken, the firm really suffers. In 2009, Law, Snakard & Gambill, P.C (LS&G), a full-service law firm in Fort Worth, Texas, began experiencing problems with its outdated version of DocsOpen DMS. We had bought the software in 1998 and upgraded it three times since then. However, about three years prior, the text search had stopped working. My firm poured many hours and about $10,000 into fixing the indexer and search capabilities of the software, but to no avail—the DMS was deemed unfixable.

As the Personnel Manager of the firm, it was my responsibility to research alternatives for a new DMS, while also looking into other ways to help modernize our approach to remote access, storage use and security standards. We had old equipment, and a tornado in 2007 had opened my eyes to the need for disaster recovery provisions. I worked closely with our IT consultant, Chris McLelland, when weighing all options for our specific needs.

There were many unique elements to consider when we surveyed the scope of a DMS conversion. We had 760,000 documents that had to be migrated, indexed and re-profiled efficiently. In addition, we were using WordPerfect for as our word processor and did not want to make the switch to Word. We needed a system that would integrate with and support our firm's existing infrastructure.

Another issue was that our indexer had stopped functioning a number of years ago. Our staff had been saving documents to a single folder that swelled to contain 80,000 documents with all the same client, matter and document type information. In order for migration to be successful, these documents needed to be intelligently organized in multiple directories.

In the course of my due diligence, I looked at Worldox® from World Software Corporation® and spoke with Ion Resources, a Texas-based reseller that sold and installed their DMS. Initially, I had met Ion's co-founder Don Lee at an ALA meeting and began speaking with him in-depth about the possibilities of implementing Worldox at LS&G. I also discussed our firm's unique needs with him, and he had a number of solutions to our problems. In addition to the Worldox DMS, we also considered its add-on, Worldox/Web Mobile, which allowed our users to have remote access to documents from any Internet connection.

Worldox had all of the features and integrations we were looking for, including support for WordPerfect documents. Don sent me a price quote for Worldox and it was the most affordable option by far. Most quotes were between $30,000-90,000 more than the Worldox figure. Worldox was a great product that was very efficient and well-priced. It integrated with everything we needed it to, including WordPerfect and our Omega time and billing software. I presented this information to the firm's executive committee of 5 attorneys, and they agreed that Worldox was the best DMS solution, as well as the most cost-effective. We bought 31 Worldox licenses and the Worldox Omega Connector in November 2012 and purchased 5 Worldox/Web Mobile licenses in December.

Even before purchasing Worldox, LS&G had begun discussing requirements and design with the team at Ion. Three initial pilot runs were done within a week to ensure a smooth transition. Our first pilot was a test with a small subset of the documents from a single client/matter. Then Ion did two pilot runs with the entire data set. The final and actual migration run began on January 11, 2013.

In order to convert the Docs Open profiles to Worldox profiles, Jeff Taylor, Ion's lead software developer and Worldox project manager, used Microsoft SQL Server Management Studio to create SQL queries to bring over the data for our 760,000 documents and profile data faster. For the folder with 80,000 documents, Jeff used creative techniques to divide the directory into smaller groups of documents, so that the files and profiles would download to the Worldox system more quickly. All the metadata and profile information was brought over to Worldox, including the versioning. Jeff also worked closely with Rob Nagy, Professional Services Manager at Worldox, to solve any small complexities that arose.

We initially were using an old Novell server, but since it was at risk of crashing due to the machine's age, we replaced it with a new server. Our firm now uses a virtual server running VMware to house Worldox, the documents and also the indexer.

To integrate existing products with Worldox, we used a variety of resources. Since our firm was using a very old version of Omega Software for time/billing, we worked closely with Tom Price of Entergel, a Worldox reseller who writes integration connectors with Worldox. Tom wrote unique programs to help create the integration. Tom worked with Jeff Taylor to develop custom tweaks enabling Worldox to work with existing software and to ensure that the integration process went smoothly. Ion Resources also implemented Symphony Suite from Trumpet, Inc. to streamline the process of scanning, filing and OCRing documents into Worldox.

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The migration was a very ambitious project and it required a very organized approach to get the job done. Despite the firm's complexities, everyone worked well together throughout the transition. Once all the documents were moved over to Worldox, our firm felt confident and secure with our new DMS and it was clear that we made this transition at the right time for our firm. LS&G decided to wait until after the holidays to finally cut over to the Worldox DMS. Our "live" date was January 14, 2013 and we also did our end-user training that day and the following day.

Attorneys received two hours of training and administrative staff had half-day sessions. Since they had previously worked with document management systems, there was a less of a learning curve. There were a few new Worldox features that individual staff members needed to have explained, but any minor difficulties were a matter of getting used to the product. The technology overall worked really well.

We received positive feedback from everyone at LS&G about the system. Worldox is a great product and one of the greatest assets of the system is that our firm now has a lot of flexibility. Attorneys can securely work remotely and access documents from mobile devices. It was a pleasure for us to work with Ion Resources, Ltd., Entergel, and Worldox during the entire process. Installing Worldox was truly a step in the right direction in terms of our staff and attorneys embracing new technologies. This new approach has positively enhanced our firm's operations. In a few short weeks, we took an old, antiquated system and transformed it into a modern, efficient system that everybody uses and likes.