

# Hoskin Farina & Kampf enhances document and email management with cost-effective Worldox.



## **Hoskin, Farina & Kampf, P.C.**

### **Challenge:**

*To find a DMS that integrates deeply with Outlook and offers greater flexibility in document security and rights-management.*

### **Solution:**

*Worldox selected; all documents migrated from LSSDocs.*

### **Result:**

*Document collaboration is greatly enhanced - without compromising security. Our users are very comfortable with Worldox.*

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*“Worldox offers similar features (to iManage) at a more affordable price and does not require a dedicated file server. We chose Worldox.”*

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**By Tony Lozano**

*Attorney Firm Administrator*

*July 20, 2010*

In the summer of 2009, our Colorado-based law firm began looking for a new document management system (DMS). We use an accounting, time and billing system from Oregon-based Legal Software Systems (LSS), and at the time we used a DMS product from LSS - LSSDocs. We desired a more robust DMS product that integrates deeply with Microsoft Outlook. Further, we sought DMS software with greater flexibility regarding document rights management and security.

When we began our search, we looked at these DMS offerings: Document Locator from Oregon's ColumbiaSoft, iManage Interwoven (now owned by the U.K.'s Autonomy), and Worldox from World Software. We eliminated Document Locator early in the process because it does not appear to be designed for and widely marketed to the legal industry.

The decision came down to Interwoven and Worldox. The firm I worked with prior to Hoskin Farina had been an iManage (Interwoven) shop; I was quite fond of the iManage DMS. Ultimately however, we eliminated Interwoven because it is an expensive solution for our firm of approximately 35 users. Worldox offers very similar features at a more affordable price and does not require a dedicated file server. We chose Worldox.

Throughout our preparation to install Worldox, I developed tremendous confidence in DCNC, the Denver-based Worldox systems integrator that had originally demonstrated Worldox for us. I spoke with several DCNC customers (all law firms) who had recently migrated to Worldox; they were very happy with DCNC's service and support, as well as with Worldox. Those conversations also provided helpful suggestions to complement our migration experience. My initial discussions with the team at DCNC added to my comfort level. Their consultants are knowledgeable about the product, and they know how law firms use a DMS. In particular, DCNC's assistance in creating our document profile structure and naming conventions proved invaluable, as did their training sessions for our users.

DCNC also helped us to save time and money, and worked to limit interruptions throughout the migration process. Because DCNC is located about 4.5 hours from our Grand Junction office, the distance could have complicated things. They made sure that was not a factor. They scheduled the

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first meeting in our office; afterward we met via teleconference or webinar. That kept travel expenses and interruptions to our business to a minimum. Our teleconferences and webinars (as opposed to in-person meetings) had no negative impact on our ability to communicate clearly.

Prior to our actual cutover, we were trained to use Worldox. DCNC provided training for users by setting up a training lab in our offices. The entire process was hands-on; each user was taught to profile, name and search for files using a database of test documents. We did our best to pair attorneys with their secretaries and respective practice groups, so that questions posed by users and the answers provided would be better understood. The Worldox interface is friendly and familiar, which facilitates learning. We assimilated to Worldox quickly, and post-migration questions were readily addressed by DCNC and Worldox.

Our mid-April 2010 Worldox installation went quite well. As with any migration, there were a few challenges. DCNC resolved them quickly. One issue involved the sluggish speed at which documents were transferring into Worldox. That took more time than anticipated, due in large part to file transfer limitations inherent in our operating system. We migrated more than 100,000 documents from LSSDocs to Worldox; DCNC took care to make sure they were transferred properly. Despite the few usual challenges associated with a DMS conversion, our migration from LSSDocs to Worldox was the smoothest such conversion I have experienced. Much credit goes to the team from DCNC. They prepared us for the process in advance, properly trained our users, and walked us through each step as the migration unfolded.

Since the installation and document migration, everyone at our firm is extremely comfortable with Worldox. Document collaboration is much more fluid and information is more easily shared, yet document security and version control have not been compromised. Worldox’s Outlook folder integration is very useful; we can store and locate email messages, Word documents, Excel worksheets, and PDFs in one location – no need to move between different programs and folders. Every document and email message is fully text- searchable. Worldox is easy to use. It makes sense, and affords us greater efficiency, which directly benefits our clients.