Worldox Takes Center Stage at Calfee with GX2 and Productivity Suite Upgrade

**By Russ Mazzaro
and Susan Zavesky**

Technology at a law firm is the invisible hand that processes data and documents to facilitate the legal work of attorneys and staff. However, At Calfee Halter & Griswold LLP, a 300+ employee firm based in Cleveland, technology sometimes takes center stage, especially when the firm depends heavily on it to serve our clients thoroughly and effectively.

For the past 13 years, our firm has used the Worldox Document Management System (DMS) from World Software Corporation. Worldox manages our documents and e-mails with a profiling system, search capability, version control and Outlook integration. Over the years, Worldox has become very popular at our firm.

In December 2010, we introduced the Worldox iPad Application to our user base and it was well received. With Worldox's reputation further fortified at the firm, the technology committee was receptive to hearing about what else Worldox could do for

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us in 2011.

In early 2011, we began planning to move offices, prompting us to take stock of all our technology. We were running Windows XP and Office 2007 and could have stayed on Worldox GX, but GX2 included a feature called "Workspaces" which would help us supplement our author-based profiling system, thereby helping lawyers and staff to organize and find documents more readily. Thus, we began to build the case internally for upgrading to GX2.

In addition, World Software was in the final stages of developing its Worldox Productivity Suite, a comprehensive workflow toolbox that would allow us to collaborate and manage projects more effectively. Realizing it would be an ambitious undertaking, but confident that our IT resources and Worldox tech support would see us through it successfully, we decided to upgrade to Worldox GX2 and install the Productivity Suite at the same time.

After careful consideration, our technology committee approved these projects and we forged ahead. As our firm is an early adopter of the Productivity Suite, World Software's engineers helped us with the implementation and its team of developers was closely

involved to monitor product improvement requests.

WORLDOX PRODUCTIVITY SUITE

The Worldox Productivity Suite for a firm Calfee's size has four main components: Workflow, Audit Notifier, Task Reminder and Chat/IM. We also had the option to purchase both Document Comparison and PDF Conversion modules from DocsCorp, a Worldox partner, at a discounted price. Initially, we decided to install the Workflow and Task modules and table the Audit Notifier and Chat/IM tools for deployment at a future date. We already used a Workshare product for the document comparison and a PDF tool so we didn't need to buy the add-on modules. (Note: For firms with less than 25 users, the DocsCorp comparison and PDF tools are included in the price of the Worldox Productivity Suite.)

From a planning perspective, World Software was going to help us with the installation itself, but our first area of focus was on hardware. Worldox requires indexer machines to catalog profiles and text, and we had been using PC-class machines up until that point. However, our hardware was somewhat underpowered for what we really needed to support Worldox GX2 and the Productivity Suite,

so we decided to upgrade to more powerful machines for indexing.

Our two Worldox GX indexers were three-year-old desktop-class XP boxes with only 1 GB of memory, and one of them had a faulty hard drive. We prepared two five-year-old, rack-mounted, server-class machines as our new indexers. Worldox indexers don't have to be brand new, state-of-the-art machines, but they need to have adequate memory and processing power to handle the data load they are assigned to index. World Software tech support helped us to make some refinements to Calfee's indexer technology; adjusting our full-text logic to work better and correcting some field table import issues.

Worldox GX2 Upgrade

Our usual protocol in preparation for an upgrade implementation is to fully test the product, review the release notes, test out third-party tools and integrations, and then develop a Calfee-specific training guide. Prior to the upgrade, we set up a live installation of GX2, customized it to suit our unique requirements, and then applied the alterations to this live testing environment.

Once the planning and testing were completed, our Worldox GX2 upgrade was completed overnight — literally; it was done in 24 hours after World Software had helped us on-site and remotely for the week before the cutover. Fortunately, GX2 caused no negative impact to the firm. The mirroring process, in which tables are copied to the users' hard drives for redundancy, took a bit longer than with GX, but the enhancements definitely exceeded the drawbacks.

One issue that required some time was purging old author codes of obsolete users who had left the firm. Our Worldox User list contained a lot of inactive users so we had to clean out the system. We also needed to make sure that all active users had a proper e-mail address defined, as many of the new GX2 features are e-mail based.

Since Worldox already had a strong following at our firm, we were not met with a huge amount of resistance to Worldox GX2 or the Productivity Suite. We scheduled focus groups to determine the most impactful features that would capture users' attention, and will continue to introduce new modules over time.

By far, the most heralded feature of GX2 is Workspaces, which allows us to select document types and move files into a specific folder. Our lawyers and paralegals love this feature because it extends their ability to organize and search for documents, and also helps them track versions. Users like the multiple document-previewing tab, the longer description field (which expanded naming capacity from 60 to 120 characters), and improved navigation and simplified searching.

Worldox GX2 Workspaces allows users to group or link selected documents for a specific purpose, irrespective of profile status. It also enables any user that has been granted access to a project to modify both the project and the documents without changing profile status. Workspaces provides fast and easy access to just the most important documents in a client or matter folder without changing or altering the documents' location.

Our employees also really like the new audio feedback in GX2, which makes a noise when they click on something. Those who do not like it can turn it off, but most users appreciate that their click is validated by an audible response from Worldox. GX2 allows us to use other sources to store Worldox documents and files. We plan to leverage this feature for our archiving plan. We will be moving documents into a document retention system shortly.

Overall Response

Calfee's lawyers and staff responded positively to the Productivity Suite and Worldox GX2. The Productivity Suite's Workflow module makes it easier for lawyers to track the progress of their projects. It helps us consolidate, and not duplicate, our efforts. The Worldox GX2 upgrade introduced new features without causing a shock to our system. There was very little wear and tear on IT as a result of these installations.

Worldox continues to be a linchpin of our firm's daily operations. Now that we have the Productivity Suite and GX2 installed, our users are more productive than ever.