

# Smooth DMS sailing: Robinson Waters & O’Dorisio find better, more affordable document management in Worldox.



ROBINSON WATERS & O’DORISIO, P.C.

## **Robinson Waters & O’Dorisio, P.C.**

### **Challenge:**

*To transition from an outdated, expensive and ultimately untenable document management set-up in which firm files were clearly at risk.*

### **Solution:**

*Worldox installed; all legacy documents converted; staff trained.*

### **Result:**

*Complete success. Zero problems encountered. Firm documents are safe; MS Office apps have been upgraded, and integrate seamlessly with Worldox.*

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*“We knew our most important commodity - our attorney’s documents - were at risk, and we knew we had to do something”*

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By **Stephen Dickson**, legal administrator, and  
**Donna Steir**, network administrator

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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.

Since 1976, [Robinson Waters & O’Dorisio, P.C. \(www.rwolaw.com\)](http://www.rwolaw.com), has been a locally-owned law firm based in Denver, Colorado and one satellite office in Telluride. With over 30 attorney shareholders with regional and national interests and approximately 50 employees, Robinson Waters & D’Orisio is a full-service firm with primary areas of practice including real estate, family law, franchise law, civil litigation, medical malpractice defense, wills, estates, and trusts, and corporate law.

As legal administrator for 14 years and network administrator for 12 years, together Donna and I run the business-side of a law practice. We aim to free up the attorney shareholders to focus on the practice of law. Donna, in particular, is our firm’s go-to person for all our computer software and hardware needs and is the bridge between the firm and our outside IT person.

In late 2009, critical issues dove tailed into a document management software perfect storm. Our users were working with a deteriorating DMS – outdated versions of Hummingbird/Open Text. We weren’t in a position to fully upgrade our version of Hummingbird because it was cost-prohibitive, so we had been patching the network with IT “band-aids” for far too long. At the same time, we were facing a costly but unavoidable upgrade to our server hardware. However, our version of Hummingbird locked us into 2003 versions of Microsoft XP even with our planned server hardware upgrade. Also, in the Denver area, there is only one service support provider for Hummingbird/Open Text, and we felt that left our firm in a vulnerable position. We had thus far avoided a shipwreck disaster, but Donna and I could see the storm looming on the horizon. We knew our most important commodity—our attorney’s documents—were at risk, and we knew we had to do something.

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Donna, therefore, began researching alternative DMS choices in late 2009. Some of the main criteria were that we needed something that was going to be stable and reliable in a comparable platform to that with which we were accustomed, and which would facilitate a minimal learning curve with the new software. We needed something that could handle the Microsoft Office applications that were already in place on our firm’s desktops and would be compatible with an upgrade to the 2010 versions we wanted. Cost was definitely important to us, but we were more concerned with how well the DMS was going to work.

Donna leveraged her personal network, blogs and Google to reach out to the legal industry for information on competing DMS products, seeking honest opinions about the performance of available software that way. In a couple of months, she narrowed down the choices and we reviewed them. Worldox stood out for us and it appeared to be the best fit for our firm: it was compatible with and would integrate all of our Microsoft applications as well as Adobe Acrobat. It had a comparable document platform that would keep the learning curve to a minimum. On top of all that, Worldox was also an affordable choice. At this point, we also had to involve our outside IT person in the decision making process. Worldox worked with the server hardware we planned to upgrade to, and so IT also supported our choice.

We contacted Worldox and they referred us to [DCNC Inc. \(www.dcninc.com\)](http://www.dcninc.com), a Worldox reseller in the Denver area. We wanted a company that was going to be here with us and would provide greater reliability and availability in our support services.

From here, we had to get the approval for the purchase from our shareholders – the attorneys. Sometimes it can be difficult to persuade attorneys to make major software purchases such as this. A firm’s dependency on technology doesn’t necessarily come first to an attorney’s mind, especially if their assistants have been insulating them from the systemic problems in the current DMS. The lifeblood of attorneys is their documents, however – and so once the attorneys were made aware that their documents were at risk, everyone at the firm fully supported the purchase of Worldox.

For the installation, DCNC was immediately prepared. We needed to coordinate our schedules internally as well as with our outside IT person and make sure everyone was on the same page. Finally, we were ready for the conversion and installation on our end in July of 2010.

We cannot say enough about how pleased we are with DCNC and how professionally they handled our conversion to Worldox. The conversion was absolutely seamless, the best we’ve seen in the 14 and 12 years (respectively) we have been at Robinson Waters & D’Orisio. Three representatives from DCNC



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oversaw the entire process and had specific areas of expertise, though each was well-versed in all aspects of the conversion and installation. To begin with, DCNC set up a test document server repository. We tested it first with all the documents we currently had. Once we did that, DCNC exported all the firm’s legacy documents out of the Open Text system prior to the installation of Worldox, so that sped up the process.

Before the installation took place, DCNC held training sessions to ensure all staff and attorney shareholders understood the new DMS before it was in place. All staff, attorneys and the managing partner were in attendance at the training sessions, and our managing partner came out of that session in agreement with what we observed: Worldox was a great product, and the people at DCNC were true professionals. DCNC also prepared a Quick Reference Guide ahead of time and made sure each of our staff and attorney shareholders had copies to review before the installation.

The entire installation was completed over a single weekend. We closed down our system Friday at 5pm and Worldox was successfully up and running by Monday at 9am. Not only had DCNC already trained our staff and attorneys, not only had DCNC already prepared Quick Reference guides – they also came in on Monday to walk the floor to troubleshoot any issues that arose on the first “live” day.

As for glitches – actually, there weren’t any. In fact, since the successful installation of Worldox, we have seen a marked decrease in our tech support needs. All of our Microsoft Office applications, in addition to Adobe Acrobat, integrated seamlessly in Worldox just as we wanted, and even some file formats we hadn’t expected such as .PTS e-transcription files and .WAV sound files. Open Text was unable to recognize .PTS and WAV files, but in Worldox, these files can be integrated smoothly into the system. It was also a pleasure to work with DCNC. We had such a great experience working with them through our Worldox conversion and installation, we are definitely looking at expanding our relationship with them.

We’ve been operating in a Worldox system for approximately 6 months now, but it seems like we’ve had it forever. That’s a sign of how good the product is. All of our documents are now integrated. We were finally able to upgrade to 2010 versions of Microsoft Office applications. The ease of use of the product itself is very intuitive, and it’s extremely reliable. We achieved what we wanted, what we needed, and did so at the right price. DCNC helped us navigate, and now everyone using Worldox enjoys smooth sailing.