



Case Studies

Examples of the 350+ projects for our 100+ clients over 11+ Years

Interwoven WorkSite conversion to WORLDOX GX

Problem: Gerald R. Stockman, LLC's (West Trenton, NJ) the previous Windows 2000 server installation was unreliable and WorkSite would not function properly after a re-boot with out intense manual intervention. Their WordPerfect 9 was not supported on XP SP2 so a desktop OS upgrade was needed to bring all workstations to the current patch levels. Rebuilding the server was a must but still left the client on a problematic WorkSite platform.

Solution: Perform an in-place upgrade and convert the WorkSite DM to WORLDOX GX and at same time upgraded the workstations to XP SP2 and to WordPerfect X3. The significant cost savings with WORLDOX over WorkSite, namely no SQL server and no annual server SSS will allow this conversion to pay for itself in 2 years.

- Windows 2000 Server to Windows 2003 Server Upgrade
- WorkSite 7.x converted to WORLDOX GX
- Custom SQL conversion scripts
- WordPerfect 9 upgraded to WordPerfect X3 (WordPerfect 13); including custom macros
- On-site, custom end user training, floor support, ongoing support

DOCSOpen 3.x conversion to WORLDOX GX

Problem: A Philadelphia law firm specializing in securities law had an aging and unsupported Hummingbird document management system. They needed a cost effective solution that would give them access to all of their legacy documents and profiles, and would restore and improve their full-text search capabilities.

Solution:

- DOCSOpen 3.x converted to WORLDOX GX. All documents migrated to a Legacy Profile Group and then a subset migrated to a production Profile Group.
- Custom SQL conversion scripts
- On-site, custom end user training, ongoing support

WordPerfect to Word w/ Desktop and Server Upgrades

Problem: It was time to upgrade from older workstations running Windows NT to XP. The firm was running a mixed word processing environment that was beginning to cause a variety of issues. The firm also wanted a solution to manage emails that would allow them to move the emails from the Exchange server and also allow them to be filed as part of the client file. As an existing Interwoven client, the solution was to migrate from WordPerfect 9 to Word 2003 and from DeskSite to FileSite

Solution:

- Migrate Interwoven DeskSite 6.x to FileSite 8.x; upgrade WorkSite 7.5 server to WorkSite 8.x.
- WordPerfect 9 to Word 2003 conversion
- Microsystems Conversion Tools to convert documents and apply custom styles.
- YreType, Power Tool Bars; O2 custom numbering solution, custom templates
- Customize Installation scripts were written to standardize and speed up deployment.
- On-site, custom end user training, floor support, ongoing support

WORLDOX w/ Word to WordPerfect conversion

Problem: As part of a complete upgrade—Novell to Windows 2003; conversion from WordPerfect 9 to Office 2003; new workstations and servers all with upgrades to XP/2003 operation systems, the client elected to implement document management as well. WORLDOX 2002 was selected because it met the requirements of being secure; being cost effective and ease of installation and deployment.

Solution:

- Implementation of WORLDOX 2002 (GX upgrade planned shortly)
- Custom integration of WORLDOX to accounting system
- Microsystems Conversion Tools to convert documents and apply custom styles.
- WordPerfect 9 to Word 2003 conversion
- YreType, Power Tool Bars; O2 custom numbering solution, custom templates
- Customize Installation scripts were written to standardize and speed up deployment.
- On-Site, custom end user training, floor support, ongoing support

For over eleven years, O2 Consulting Group has helped firms like yours keep their document processing tools and procedures at the highest, proven levels of sophistication.

Call us today for a free consultation and recommendations for moving your office toward state-of-the-art performance.

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SERVICES:

- Document Management (Planning, Configuration, Deployment and Support)
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Forms
Templates
YreType Macro Suite
Power Tools Bars
Smart DocID
Bates Label
- Training

Custom Case Tracking and Reporting Application

Word 97 to Word 2003 Conversion

Problem: A Philadelphia defense firm manages cases among three main offices and 20+ local attorneys nation-wide. The problem we solved was that three separate and un-coordinated systems of tracking 100,000+ plaintiffs over 10,000+ cases, with a fourth system of manual reporting that required man weeks per quarter, and no existing Case Management system met the client's requirements.

Solution: Develop a custom coded application with:

- Web access via HTML, ASP, Visual Basic & Java scripts, and ActiveX for data entry, editing, complex Boolean searches and web site administration
- Web Reporting via Crystal Reports produces reports in minutes rather than weeks.
- Predefined reports are customizable by end users on a number of parameters.
- All custom searches are available in a printer friendly Crystal Report at the click of a button
- All searches and reports are exportable in a variety of standard file formats -- Excel, PDF, Word, CSV, XML, etc.
- Custom MS SQL 2000 database
- Many Enhancements and Support since initial deployment

Problem: A Philadelphia law firm with diverse practice areas and over 200+ seats in 6 offices had an NT desktop with Office 97 that needed to be updated to XP and Office 2003. The firm also decided to convert nearly 1 million documents that had been left unconverted since they left WordPerfect in the late 1990's.

Solution:

- Interwoven DeskSite client upgrade
- Microsystems Conversion Tools to convert documents and apply custom styles.
- YreType, Power Tool Bars; O2 custom numbering solution, custom templates
- Deltaview document comparison tool along with an O2 custom utility to shut down track changes, Metadata Scrubber, Popup Blocker, customization to Outlook and Exchange
- Custom installation scripts were written to standardize and speed up deployment
- Consultation on upgrade deployment strategy, design and development of desktop
- Consultation and development of custom end user training
- Ongoing Support

Additional Engagements:

Seats	Main Office	Type	Number of Offices	Main Projects	YreType Installation
225	Philadelphia, Pennsylvania	Law Firm	5	Implemented Document Management; ongoing DM upgrades; WordPerfect to Word, and Word to Word conversions; custom software development, Power Tool Bars.	Yes
600	New York, New York	Law Firm	2	DOCSOpen to Interwoven conversion and Word 95 to Word 2000 upgrade/conversion	Yes
120	Philadelphia, Pennsylvania	Law Firm	3	DOCSOpen to WorkSite conversion; WordPerfect to and Word 2002 conversion using Levit & James' tools	Yes
125	Richmond, Virginia	Law Firm	4	WorkSite Upgrades; DeskSite runs in a Citrix environment; on-going support	No
70	Morristown, New Jersey	Law Firm	2	Implementation of DM (Interwoven); multiple WorkSite upgrades, custom macros; WordPerfect to Word conversion, Power Tool Bar; on-going support	Yes
85	Plymouth Meeting, Pennsylvania	Law Firm	2	Conversion from SoftSolutions to WorkSite; WordPerfect to Word conversion, multiple WorkSite upgrades, Power Tool Bars, custom software development.	Yes*
n/a	Conshohocken, Pennsylvania	Case Management Software Co.	3	Expert consulting on integrating third party software with WorkSite	n/a
40	Syracuse, NY	Law/Accounting Firm	1	WorkSite implementation for law firm	No
85	Philadelphia, Pennsylvania	Law Firm	4	Multiple WorkSite upgrades, Word (Office Suite) upgrade; custom installation scripts to standardize and ease deployment; on-going support	Yes
180	Washington, D.C.	Federal Government	1	WorkSite Installation	No
5	King of Prussia, Pennsylvania	Corporate Legal Department	1	Installation of Interwoven DM	No
35	Richmond, Virginia	Property Management	2	Implementation of WORLDOX GX	No
48	Philadelphia, Pennsylvania	Law Firm	1	Implementation of WORLDOX GX; WordPerfect to Word conversion; multiple desktop upgrades; on-going support	Yes

Almost all of our engagements, including all those listed above are a custom developed project plan. We know that each client is unique and therefore, while we can leverage the experiences from prior projects, we know that each client requires unique features. We all know that there is really no such thing as a 'canned solution.' Since each of our consultants has over 25 years of IT experience in delivering custom solutions, we develop and deliver a project that meets your firm's specific requirements.

* included a custom interface to LawManager case management system, including optimizing the LawManager Microsoft SQL database for performance.