



DuaneMorris®

FAST FACTS

Company:

Duane Morris LLP, a global law firm with more than 700 attorneys in 24 offices across the United States and around the world.

Industry:

Legal

Geography:

Headquartered in Philadelphia
20 offices in the U.S.
4 offices in Asia and Europe

Requirements:

Upgrade the firm's new technology including PayneGroup's software solution package integrated with Windows 7/Office 2010.

PayneGroup Product Solutions and Services:

- Metadata Assistant
- Outlook Send Assistant
- Forms Assistant
- Numbering Assistant
- Professional Services: Migration Roundtable, FAST Administrator, and Master Series Classes

Results:

Successful migration to Windows 7/Office 2010 and integrated solutions.

Duane Morris Enlists PayneGroup's Software, Training and Microsoft® Expertise for Office 2010/Windows 7 Upgrade

COMPANY

Duane Morris has 24 offices and over 700 attorneys and we have used both software and services from PayneGroup for the past ten years.

PRODUCTS

PayneGroup's Metadata, Forms, Numbering and Outlook Send Assistants have become integral parts of our firm's workflow.

Over time, we have developed great confidence in Payne's technology as well as in their talented staff. With PayneGroup's templates and macros, the process of creating, formatting and standardizing documents was improved and many corruption issues were resolved.

CHALLENGE

Prior to using PayneGroup's software, our users only had Word's native elements with which to build outlines and Tables of Contents, which were not nearly as streamlined as the Numbering Assistant's approach. Numbering Assistant is a fantastic tool which has reduced the time required to outline, number and generate Tables of Contents for newly and previously-generated document content.

SECURITY

Metadata Assistant resolved concerns related to email attachment security. Prior to the implementation of this product, we did not have the capability to perform metadata checking, so our users would need to spend time manually looking for readily visible metadata items in properties and document text.

PREPARING FOR THE MOVE

When we were ready to do our Microsoft Office 2010/Windows 7 (32-bit) upgrade, we called upon PayneGroup once again to update all of their software to ensure it integrated with the firm's new technology, as well as shoring up other integrations with our InterAction CRM, FileSite DMS and Microsoft SQL. There were a number of complicated updates that needed to be made to our system, and the PayneGroup people were able to accomplish all the technical work remotely, providing information and code as needed.

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"We have continually chosen to work with PayneGroup because we have great confidence in their staff's ability to help us run smoothly." – John Sroka and Eleanor Kingsley, Duane Morris

Additionally, PayneGroup set up a mock-up of our new desktop environment in our office so they could more easily anticipate and identify any integration issues and it's been truly beneficial to our rollouts. Although glitches are expected when making a switch to a new software platform, their responsiveness and expertise helped us solve problems quickly and efficiently.

SERVICE

PayneGroup truly has unmatched expertise in Microsoft Office technology for law firms. Donna Payne and PayneGroup have written 12 books on Microsoft Office and PayneGroup has achieved and maintained Microsoft Certified Gold ISV partner status for years. Since Microsoft is a cornerstone of our technical environment, working with a team on its cutting edge was ideal.

PayneGroup's professional services division delivered several programs to help our trainers and help-desk staff get up-to-speed on the new Microsoft technology. They conducted a multi-day Master Series training on Word 2010 for our trainers and help desk.

Also, for every Microsoft Office upgrade, we have had PayneGroup provide their Migration Roundtable service. Their staff met with us over a 2-day period and generated a massive 250-page book of recommendations we keep and refer to as "The Bible." Recommendations in this volume include a thorough review of updates, best practices, configuration preferences, and requests

for customizations. The group from our firm involved in the Migration Roundtable included carefully selected participants from various departments.

Lastly, PayneGroup completed a one-day Forms Assistant Specialist Training (FAST) class, to help our in-house administrators gain working knowledge of the PayneGroup software in order to maintain and add to the Forms Assistant, as well as troubleshoot routine issues independently without needing assistance from PayneGroup's help desk.

RESULTS

We have continually chosen to work with PayneGroup because we have great confidence in their staff's ability to help us run smoothly. Their team's broad expertise and versatility have proven to be extremely valuable to our operation. For a decade, we have had a mutually beneficial partnership for both organizations. We would highly recommend PayneGroup to any law firm needing quality software, responsive and friendly staff, and stellar product knowledge.

ABOUT THE AUTHORS



John Sroka is CIO and Eleanor Kingsley is Application Support Specialist at Duane Morris. Both are based in the firm's Philadelphia office.