



## A CONVERSATION WITH LONNIE POWERS AND BERNIE TALTY OF MLAC

Earlier this year, the Massachusetts Legal Assistance Corporation (MLAC) and Legal Services Organizations (LSOs) throughout Massachusetts undertook a major project, the implementation of a single, organization-wide case management system called Legal Files. As part of this rollout, MLAC and the sixteen related LSOs needed to standardize the software used across all offices. This meant conversion of word processing from earlier versions of Word and/or WordPerfect to Word 2003, and conversion from GroupWise, Outlook Express, Lotus Notes or earlier versions of Outlook to Outlook 2003.

The Edge recently had a chance to discuss this ongoing project and its results with Lonnie Powers, Executive Director, and Bernie Talty, Case Management Systems Administrator, at MLAC. Powers explained there were a number of reasons for this case management rollout. "There was a state-wide need for a unified case management system. This was an opportunity to build a unified and cohesive delivery system." While there were a number of different case management systems in use across the state, many of the LSOs did not have any system in place. Powers saw this initiative as a way for MLAC and the programs to get better information about what clients need.

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## LA JOIE DE VIE!

That was the theme for this year's **ALA's 35th Annual Educational Conference and Exposition** in Montreal. (Well, OK... it wasn't the official theme, but it should have been.) *Bonjour* to all of the people that stopped by the ODC booth in the exhibition hall. We saw many of our friends from ALA Region 1 and met a lot of new people from all across North America.

And *merci beaucoup* to everyone with whom we shared a coffee cake and conversation. If you're looking for more of those Boston Coffee Cakes, you can find them at [www.BostonCoffeeCakes.com](http://www.BostonCoffeeCakes.com). Or maybe we'll have more cakes if you come by and see us at the Region 1 conference at Mohegan Sun in September. Hope to see you there!



*From left: Susan Evans, Diane Forman, and John Wood at this year's ALA Conference, held in Montreal.*

**More Inside:  
New Webettes...Remote Support...LMS  
Solutions...and Ask Olivia!**



## WHEN IS AN IT DIRECTOR NOT AN IT DIRECTOR?

*When they're wasting time trying to be an Application Support Specialist.*

We realize that not every small or medium-sized firm has the luxury of hiring a dedicated person to solve their application support needs. All too often, in many firms, the task of application support falls into the lap of the Office Manager, the Firm Administrator or the IT Director.

In some firms, figuring out why a document's sections have broken or why the automatic numbering seems to have a mind of its own becomes the job of the techno-savvy paralegal or the secretarial support person who always seems to have the answer. But what if these people have other things they're supposed to be doing with their time? What if they're not available when you need them?

Could your firm use **unlimited application support** for a flat monthly fee? You now have that option with the newest offering from ODC: **SureSupport**.

Let ODC provide you with unlimited, remote application support for one flat monthly fee. As a subscriber to ODC **SureSupport**, your firm's users will have access to a team of seasoned Microsoft Office support specialists that understand how Microsoft Office works in your environment. They can instantly remote into a user's system and provide them with the knowledge to solve their problem. If the situation requires a "hands-on" approach, our specialists can, with the user's permission, take control of the pc and effect the solution while the user watches.

To find out more about ODC **SureSupport**, call us at 617-965-6013 or email us at [info@odcllc.net](mailto:info@odcllc.net).

## GOT 20 MINUTES? LEARN SOMETHING NEW!

Learn a little something at one of ODC's new webettes. Offered as an introduction to a concept or feature that we frequently get questions about, such as "*So why should I use styles in Word?*" or "*What's the big deal with metadata, anyway?*".

Webettes are informative and fun. Get some new ideas and ask some questions. Best of all, they're free!

Come see what all the fuss is about. Check the ODC website ([www.odcllc.net](http://www.odcllc.net)) to find out the next webettes on the schedule.

## WHO HAS TIME FOR AN LMS? YOU DO.

Don't have the time or resources to manage a custom LMS? Let ODC and TutorPro do it for you. TutorEnterprise is now offered as a hosted solution, allowing you to have all the benefits of the TutorPro training system without the maintenance or administrative costs.

Besides managing online training courses such as TutorPro, TutorEnterprise can help you track CLE/CPD credits, training costs and other certifications, as well as print class rosters and training reports.

Call ODC to learn more about the possibility of a TutorEnterprise hosted solution for your firm.

*Don't forget to stop by ODC's booth at the ALA Region 1 Conference at Mohegan Sun in September!*



## MLAC, CONTINUED FROM P. 1

Naturally, there were hurdles to overcome. Powers said, "The process has taken a lot more time and may cost more than we expected. It took time to win support from the various programs; many people were initially skeptical of the plan. It was difficult to agree on the various software components. There was a good deal of interest but it was hard to get a commitment."

A key step in getting that commitment was getting participation across the organizations. Powers explains that it was important that everybody have a chance to participate in the process. "We gathered the interested people together and then invited the rest to participate."

One of the most important steps was to select a consultant to help guide MLAC through the process. "We worked with Andrew Adkins

from Florida. His participation was key, and his assistance was critical in the vendor and software selection process."

Selection of the right systems integrator was very important, and that process took longer than Powers had expected. "We needed to review all of the prospective integrators' proposals and evaluate which strategies would be the right fit for our environment. We selected Exenet, and they have helped us implement a system that leverages centralization where appropriate but with consideration for the individual needs of the separate LSOs."

Bernie Talty joined MLAC as the Case Management Systems Administrator shortly after the project got underway. When asked what his first impressions were, Talty said, "I saw some of the initial skepticism as well. Because many of the LSOs were migrating from WordPerfect to Word, we had to deal



**Dear Olivia,**

***I have a lot of trouble working with tables in a Word document – especially when trying to adjust columns to the size I want. They seem to have a mind of their own. What's up with that?***

**Signed,**

**Tricky Tables**

*Dear Tricky,*

*It does sometimes seem like Word's table feature has a mind of it's own – but what you've noticed is simply those column borders automatically 'snapping' to an invisible grid. This can be really frustrating when you are trying to design a form and need certain things to line up just so.*

*Solution: Hold down the 'Alt' key while dragging the columns around – this gives you fine-tune precision when adjusting either columns or rows. Voila!*



with document conversion issues. Some offices were impacted by other factors. For example, some of the offices didn't have T1 access initially, and that caused certain response time issues. We discovered that it was important to have both Legal Files and Word templates in place prior to each LSOs conversion." MLAC chose Esquire Innovation's iCreate for template management and automatic numbering management. Other Esquire products were used for metadata removal and document comparison.

Despite these initial issues, Talty confirms that the feedback ultimately has been that the system is so much better than what they had before, and that people comment regularly on the increased reliability of the system.

One factor for the overall success of the rollout, Talty feels, is the remote HelpDesk support provided by ODC. "People have come to rely on ODC's remote Help Desk support. Given all of our locations, it would not have been possible to put support people at each site. ODC has been handling all of our application first level of support and the users have come to know and trust the consultants staffing the remote Help Desk."

When asked if he had any suggestions for other organizations planning a rollout of this magnitude, Powers replies, "Project management is extremely important. Jim Breslauer, one of our Advocates at Neighborhood Legal Services, shouldered that responsibility in the early stages, in addition to his regular workload. Jim did a great job until we hired Bernie, who now dedicates almost all of his time to this rollout and ancillary, integrated projects. For a project of this scope, you really need a full-time, highly skilled project manager on your side or you'll regret it."

Besides the obvious benefit of an integrated, system-wide case management system, Powers also describes an unexpected benefit.

"We found that, given the opportunity, all of the programs that have been transitioned onto the new system have worked very well together. We feel that is one of MLAC's roles, assisting programs in that opportunity." Talty agrees, "The programs work very well together, given the mechanisms to do so."

Powers explained that Legal Files has provided advocates with a new tool to share information about how to best serve clients, "much of which had previously existed only in people's heads. The software has allowed the users to share that information with one another and learn from each other."

In conclusion, Lonnie said, "The rollout is going very well and the new system will be of great benefit for a long time to come." 

## ESQUIRE PROMOTION

Not satisfied with your current solution for creating, formatting and re-purposing documents? Are your users struggling with styles and automatic numbering?

Consider iCreate, the user-friendly template and macro package from Esquire Innovations. Esquire is currently offering 50% off the standard license fee to firms who want to upgrade from an in-house or third-party solution to iCreate.

Call ODC to schedule a demo of iCreate, or any of the other Esquire products, which include iScrub (metadata removal) and iRedline (document comparison).

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