

Worldox 2002

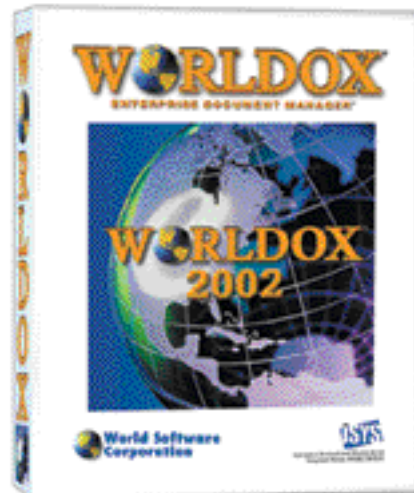
World Software Corp.

(800) 962-6360

www.worldox.com

Price: \$395 per concurrent user,
additional \$70 per user annual fee
for maintenance release and support.

Windows 95/98/NT/2000/XP



World-class Document Management

Worldox 2002 adds flexibility and timesaving features for total DMS.

Reviewer 1: David Hiersekorn is a recent law school graduate and legal researcher based in Orange County, Calif.

If you are reading this article trying to decide if you should get a document

Worldox 2002 "mirrors" your files to the local hard drive automatically for offline access.

management system, you are too late. You already have one. The only question is whether it's any good.

On the bad side of the DMS spectrum, you find firms that leave it up to individual staff members to decide where to save their work and how to name their files. These firms are easily recognized by the periodic panic attacks and wasted time spent looking for files

that Bob "could have sworn he saved on his C: drive."

One step above that are firms with defined naming protocols, but without DMS software. These firms are just like the first group, except in this case, Bob actually did save the file on his C: drive.

For years, I belonged to the second group and thought everything was just fine. Nary a month after implementing DMS, I now realize how incredibly wrong I was.

Installation

Worldox 2002 includes an electronic manual to guide you through the pre-installation planning process. Included in the manual is a recommended three-day installation plan. I have to admit, I was a bit worried whether I was up to the demands of the task. However, because I was installing the software for a small firm, it turns out the process was not quite so daunting.

It's really a matter of scale. Larger firms, of course, will have larger and

more complex installations, while smaller firms could complete the process in a day or less. In my opinion, anybody qualified to set up your firm's network also would be qualified to install Worldox.

In my particular installation, which included linking Worldox 2002 to Amicus Attorney by Gavel & Gown Software Inc., the initial setup and configuration took about an hour. Installing and configuring the workstations took an additional 20 minutes each.

E-mail Management

After implementing e-mail support in the last version, World Software Corp., cranked up its e-mail capabilities by adding the "Worldox/InBox" and "EMail Tab." The "Worldox/InBox" automatically imports your e-mails from Microsoft Outlook or Novell GroupWise and allows you to file and enter data into document information fields (*i.e.*, Client, Matter) just like traditional documents. You also can read and reply to

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e-mails from within Worldox, just as if you were in your e-mail program.

The usefulness of this feature will largely depend on how you personally use e-mail. Users who routinely send detailed e-mails chockfull of information will no doubt get a great deal of use out of the new features. On the other hand, users whose e-mails resemble my typically terse, "Here's the file," might find more features than they need.

Still, I have to give kudos to the folks at World Software Corp., for providing all the tools a person might need, but doing so with enough flexibility to accommodate the full spectrum of users.

Related Documents

Also new in this version is the ability to relate documents independent of client and file assignments. For example, if you have written a series of related memos for several different clients, you could link those memos together into a single "library" of information that could be viewed in a single window.

The latest version also includes tabbed worklists to organize your work. Each time you perform a search or pull up a document folder, the search results or folder stay available in a clickable tab for later access.

Quick Profiles

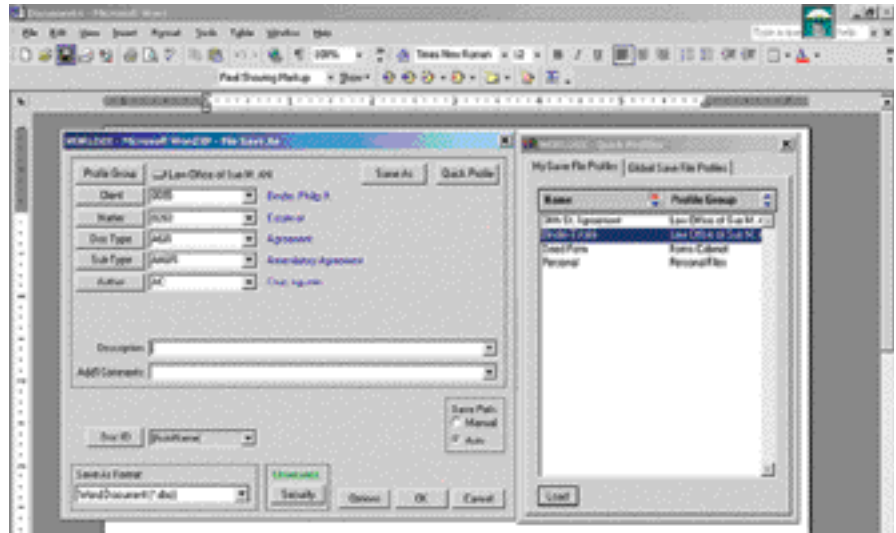
One of the great things about using a DMS is all the information it lets you track for each document. On the other hand, that means you actually have to enter the information to make use of it.

Because much of the information you enter for various types of documents will be repetitive, Worldox 2002 allows you to save this information in Quick Profiles for easy recall.

Offline Access/ UNC Support

I am a full-blown road warrior, getting about half of my work done outside the office. Before installing Worldox 2002, this mobility required a rigorous regimen of synchronizing files between my laptop and the network drives. The process was effective, but it required both time and constant attention.

Now, I no longer need to worry about that. Worldox 2002 automatically "mirrors" your files to the local hard drive for offline access. Each time you open or save a file from the Worldox



Creating Quick Profile templates saves time by automatically filling in repetitive information when generating document profiles.

document repository, the program automatically saves a copy of the file to a mirror folder on your local hard drive. That way, when you are disconnected from the network, you still have access to any file you have worked on previously.

The program allows you to check documents out, which makes the document yours until you check it back in. Depending on your preference, you can block all access to the document while it's checked out, or allow read-only access.

Whether you access files offline in mirror mode, or by checking them out, Worldox 2002 automatically synchronizes them to keep your files up to date.

Conclusion

I found this article very hard to write. Not because I struggled for words, but because it's difficult to type while kicking myself for not implementing a DMS earlier.

Worldox 2002 didn't change the way I worked. Instead, it saved me the stress of making sure my documents were properly saved, available outside the office and updated when I returned. I no longer have to think about where my documents are, and instead, I can focus on what my documents say.

The e-mail support and offline access are lifesavers. You literally could not pay me to go back. ☹️

FOR THE RECORD

FEATURES

1. Installation
2. E-mail Management
3. Related Documents
4. Quick Profiles
5. Offline Access

JUDGMENT

Pros

Cons

Verdict

★★★★ = Best
 → = Worst

Hiersekorn said:

The pre-installation process can be a bit daunting, but the actual setup is within reach of any network professional.

Worldox 2002 has full-blown e-mail support without being overbearing.

This feature adds another useful way to organize and access your documents.

This could be a valuable timesaver for firms that track a lot of information.

Worldox gives you full access to your documents whether or not you are connected to the network.

Worldox gives you a great deal of control over your documents in a highly usable package.

The built-in document viewer is a tad weak.

★★★ Only because iManage offers better document viewing features.

Reviewer 2: Jeffrey Allen is a general practice attorney with an emphasis in real estate, business transactions and litigation based in Oakland, Calif.

Worldox 2002 is the latest iteration of one of the most popular document management systems on the market, with new and improved features for ease and efficiency.

Worldox provides a framework for the logical and systematic organization, storage and retrieval of documents generated by a variety of programs. In this context, documents include text generated by word processors or e-mail programs, graphics and spreadsheets. Properly implemented and used, the program should make location and retrieval of stored documents quick and relatively painless.

Installation

Installing and configuring the program requires input from personnel to ensure the configuration works for that office, but the process is sufficiently complex and the learning curve is steep. Most medium and small firms and solo practitioners are well advised to hire an experienced consultant to set it up. Accordingly, include the cost of such services in your analysis of the acquisition cost for the program. Larger firms with information technology departments and qualified IT personnel are in a better position to handle the installation and configuration on their own, but

still might benefit from having their IT personnel work with an experienced Worldox consultant.

E-mail Management

Today, more and more business information comes across our desks in the form of e-mail. We need to preserve e-mail containing information relevant to our practice.

Worldox 2002 includes e-mail management capabilities that allow you to either move e-mail from the e-mail program to the Worldox database or copy it into Worldox. Once in the Worldox environment, you process e-mail as you would any other document. Worldox also includes basic e-mail functions, allowing you to open and reply to e-mail from within Worldox.

Related Documents

Sometimes documents stored in different files relate to the same transaction or relate to each other in another way significant to you or your practice. You might, for example, want to link a brief to cases you downloaded and saved. Worldox recognizes you might have a reason to connect apparently unrelated documents and gives you the flexibility to manually connect any number of



A new feature of Worldox 2002 is the ability to relate documents independent of client and file assignments.

documents together, regardless of whether they share any link normally recognized by the software.

Connecting related documents allows easy retrieval of all linked documents as a group, expediting the process by comparison to individual document retrieval. You can identify and access all linked documents through any of the related documents.

Quick Profiles

Worldox files electronic documents based on information you assign to each document by completing a document profile. Completing profiles for each document can become a time-consuming process.

The introduction of Quick Profile Templates expedites filing by recognizing certain types of documents will share common profile information. You can create and save templates containing the commonly used information based on your needs. Selecting a saved template during the profiling process causes the template to automatically complete the common fields in the profile, leaving the remaining information for manual entry and saving the time and effort required to complete the repetitive common information.

Offline Access/UNC Support

Worldox's "Mirror" mode allows users to work with the program and its data whether or not they are connected to the network and enables an attorney to take a functional version of the program and necessary data on the road in a laptop computer.

Worldox mirrors both program information and documents. Program mirroring synchronizes program and settings files between the central database and the workstation or laptop. Document

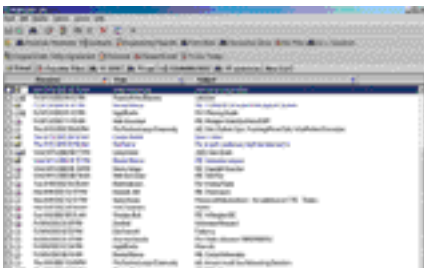
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FOR THE RECORD	
FEATURES	Allen said:
1. Installation	Most users will find the process of installation, configuration and training somewhat daunting. You will be better off hiring a qualified Worldox consultant.
2. E-mail Management	The program allows you to manage e-mail as you would manage documents. You can read and write e-mail from within the program.
3. Related Documents	You can make connections across client files and directories without recopying the document.
4. Quick Profiles	This feature allows users to create profile templates, enabling common data to be loaded automatically and associated with the document.
5. Offline Access	The program can copy documents to local drives to facilitate offline access. Worldox supports UNC naming of drives for storage.
JUDGMENT	
Pros	Once in place, the program allows for the easy location of documents in your library. Data can be used on and off the network.
Cons	The setup and installation process is complicated and time consuming.
Verdict	★★★★ If you are going to use a DMS, Worldox 2002 works well.
★★★★ = Best	
↓ = Worst	

Allen Review

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mirroring copies documents to the workstation as they are opened or saved while the computer is connected to the network. You can synchronize changes in documents between a disconnected workstation or laptop and the central database when you reconnect the computer to the network. If the network goes down or a computer is disconnected from the network for any reason, it will have



When you perform a search or pull document folders, WorldDox 2002 organizes the folders in clickable tabs for easy retrieval.

current program files and recently used documents stored in its database.

To ensure a user has documents that might be needed in an offline situation, whether or not they were recently used on that computer, the program's "Documents to Go" feature will copy

selected documents to local drives for offline access. This feature will be helpful in addressing the need to have offline access to a quantity of documents. The copied documents can be optionally set up as read-only to prevent them from being copied back and forth and overwriting the originals.

WorldDox 2002 supports Universal Naming Convention for network resources and local drives.

Other Considerations — Large Firms, Small Firms and Solos

In large firms, the installation/acquisition cost (including consultant's fees and staff time) breaks down to a relatively small amount per attorney. Plus, the quantity of documents in large firm practices and the number of individuals generating and using the documents clearly calls for implementation of a document management system. Larger firms should find little difficulty justifying the per capita cost.

Small firms and solo practices face a much higher per attorney cost to

acquire and implement this program. As firm size shrinks, the number of documents also likely comes down, but in comparison to larger firms, the per capita cost of the installation increases. Nevertheless, the program can help bring efficiency to a small practice that handles large quantities of documents. Attorneys in small and solo practices should look at the program and their practices to determine if they can justify the installation and setup costs.

Once installed, the overhead of coding new documents should not be significant by comparison to the time it would otherwise take to retrieve a document. ☺



Editorial Note

Cross Examination compares two different reviewers' opinions of one product. Both reviewers are given the same list of features to address while reviewing the specified product. The two reviewers are asked to provide a summary statement, highlighting the pros, cons and final verdict of the program. Reviews are conducted by practicing attorneys and other legal professionals using the actual products on their systems. Vendors are never allowed access to reviews before publication.



WORLDQX 2002 New Features and Capabilities

<ul style="list-style-type: none"> ■ Integrated E-mail Management ■ WORLDQX/Inbox ■ Tabbed Worklists ■ Quick Profiles ■ UNC Support ■ WORLDQX "Docs to Go" ■ Supports Microsoft Office XP and Corel WordPerfect Office 2002 	<ul style="list-style-type: none"> ■ Date Profile Field with built-in calendar ■ Improved support for Long File Names and Comments Field ■ 12 Character capability for subdirectory field (expanded from 8) ■ Works with Citrix and other remote computing solutions ■ Simplified iManage and PC Docs Conversion Kits 	<p><i>New in WORLDQX 2002 Service Release 1 (SR-1)</i></p> <ul style="list-style-type: none"> ■ Upgraded integration with Workshare DeltaView ■ WORLDQX Color Controls highlighting features ■ New integrations with PDF conversion products pdf995 and pdfFactory
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For more information on WORLDQX, visit www.worldox.com or call (800) 962-6360