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Worldox Connect Adds Secure Document Sharing and Collaboration to Worldox

By Neil J. Squillante

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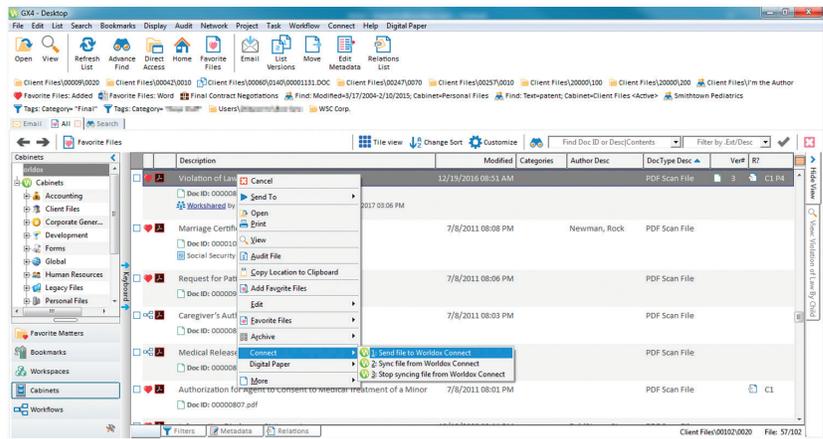
Secure document sharing with clients looks like the next big thing in legal technology thanks to more stringent ethics rules and more sophisticated clients. Ideally, moving beyond email to a more secure platform should not require your firm to overhaul its existing infrastructure and workflows — including its use of Outlook.

Worldox Connect ... in One Sentence

Launched recently, World Software's [Worldox Connect](#) is a secure document sharing platform that integrates with [Worldox GX4](#), the company's popular document management system (DMS).

The Killer Feature

Sharing one or more documents or folders begins with a right click within the Worldox client, and choosing the *Send File to Worldox Connect* option from the contextual menu. You then set the permissions for the items you're sharing. You



Right-Click Access to Worldox Connect

can prevent or allow clients to invite others, restrict files to viewing or allow downloading, and set an expiration date. Worldox Connect uses Workshare technology, but you need not be a Workshare customer to use Worldox Connect.

Clients who receive a sharing link via email for the first time create a Worldox Connect Portal account on the web, and from there can begin collaborating with you. Collaboration tools enable clients to comment on documents and compare changes between versions.

If you allow downloads, clients can edit documents and upload a new version. Worldox notifies you of the new version, which you can bring into Worldox using the *Sync File From Worldox Connect* function in the same contextual menu used to initiate secure sharing. You can then make your own edits, and send this version back to the portal. At anytime, you can stop syncing and remove documents from the portal.

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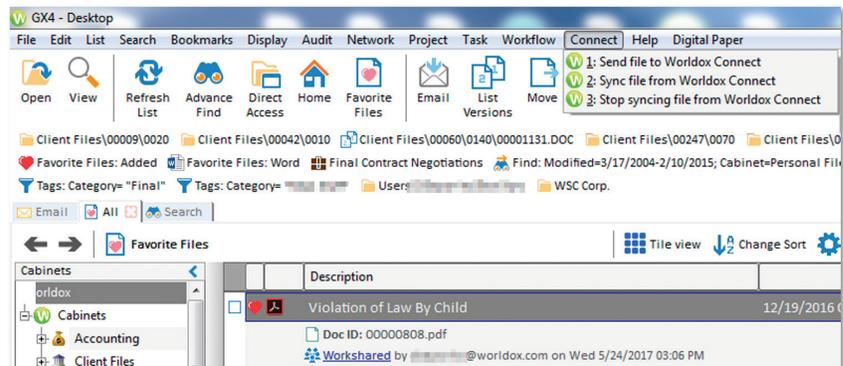
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Other Notable Features

In addition to sharing documents from within Worldox, you can take advantage of Worldox Connect’s Outlook integration. This works similarly to sending attachments the old fashioned way except that you attach documents directly from Worldox. This triggers the Workshare Protect panel within Outlook in which you apply access rights.

The documents then get moved to the Worldox Connect Portal, and the message you send contains a corresponding link. If documents don’t require the security of Worldox Connect, you can instead convert Word documents to PDFs on the fly, remove the metadata from the documents, compress them into a ZIP file, and send them via email.

Worldox GX4 offers a new tool called Groups to facilitate sharing. You can create a Group for



Toolbar Access to Worldox Connect

a matter or other project, and then share the Group via Worldox Connect. Group members can then share documents and collaborate.

Worldox Connect works on your iPhone and iPad too. You can share documents and access shared documents on the go by using the Workshare app in conjunction with the [Worldox app](#).

What Else Should You Know?

No matter how you use Worldox Connect, administrative tools enable you to view an audit trail of all activity, revoke access, delete users, force password resets, etc. Shared documents reside in Amazon Web Services and are encrypted at rest and in transit. You can change datacenters and other parameters for compliance purposes.

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