Document Management, Automation & PDF Tools

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Legal Tech
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Worldox GX4 Professional Product Review:

Effortless email and document management designed for small law firms and corporate legal departments, available on premise or in the cloud to accommodate your file storage requirements.

Documents are your literal work product but if you don't have a dependable method for managing them, you will always be scrambling for lost or misplaced documents (how embarrassing!). And it's not just Microsoft Word documents… you need a foolproof method for storing and organizing emails, images, spreadsheets, presentations and much more. And, by the way, you're also responsible for securing and protecting those files. Worldox helps you solve today's challenges involved with storing, accessing, retrieving and securing documents and digital files of all kinds.

World Software Corporation's Worldox document and email management software, GX4 version 14, comes in three packages: Professional, Enterprise and Cloud. The offerings are all built around an easy-to-use desktop client that runs on any PC supporting Microsoft Windows 8 or 10.

For Worldox Professional and Enterprise products, the desktop client software stores and retrieves documents from on-premises locations. For the Cloud product, the desktop client software accesses documents stored in World Software's cloud, a Rackspace hosting facility in Chicago with failover capability in Dallas.

Worldox Web 3.0 complements the Professional and Enterprise products. The Web product allows remote access to documents stored in the Worldox document management system (DMS) via a web browser or supported mobile devices like the iPad and iPhone.

Worldox Professional is designed for firms with one location, while Enterprise is made for multiple offices and is optimized for wide-area network performance. Worldox Cloud and Web 3.0 work everywhere on the internet. In this review we are focused on the Professional and Web 3.0 products but the content applies to the desktop and Web 3.0 software clients, who all have the same user experience for the Enterprise product.

The Professional edition does not require a dedicated file server but needs one or more file shares with enough disk space to store documents and an associated database.

The Worldox database stores and indexes document profiles and text. The database overhead requires approximately 20-30 percent of the storage used by documents. Worldox requires at least one PC per site to profile and index documents. A workstation-class PC running Microsoft Windows version 8 or 10 will do. The PC needs Microsoft Outlook 2013 or 2016 to index email. The Worldox desktop client runs on any PC that can run Windows 8 or 10.

A Legal Software Company with a Well-Respected Legacy

World Software is a privately held company that was founded in 1988 and is based in Glen Rock, NJ. It has stored and cataloged documents for individuals and small to midsize organizations for more than 32 years. World has 6,500 customers in 54 countries. More than 300 organizations have been customers for more than 20 years.

World operates in 54 countries with the US as the top market and Canada and Australia vying for second place. Certified resellers sell, implement and install Worldox software. The approximately 250 resellers are boots-on-the-ground to reach law firms and corporate legal departments in the small to midsize market (1-1,000 users) where 99 percent of customers use Worldox on premise. The company's ideal customer has from 2-300 users.

World wins approximately one new customer per day and about 200 new law firms each year. When the potential user population exceeds 150, World competes with the likes of iManage, NetDocuments and OpenText. The company considers itself the third DMS player in the legal market but the first in the small to midsize legal market.

Help legal professionals in small to midsize law firms and corporate legal departments to find, manage, organize and secure documents and email by client matters.

Company Brand:
World Software Corporation
www.worldox.com

Product Name Brands:
- Worldox GX4 Version 14
- Worldox Professional
- Worldox Enterprise
- Worldox Cloud
- Worldox Web 3.0

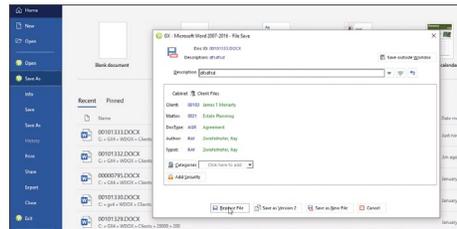**Recent Developments and Updates:**
- In addition to the traditional "List View" for documents, users can now switch to a "Tile View" that organizes document versions with descriptions.

- The Worldox tab in the Ribbon interface of Microsoft Word and Excel offers a one-click, quick-save option to profile a document without a dialog box popping up and interrupting your work.

- Worldox now offers a more compelling email engine located on a Microsoft Exchange Server, regardless of whether the Exchange Server is on premise or in the cloud.

- A redesigned web interface to the Worldox database allows users to perform DMS functions outside of an office location.

> **Worldox Professional is designed for firms with one location while Enterprise is made for multiple offices and is optimized for wide-area network performance. Worldox Cloud and Web 3.0 work everywhere on the internet.”**
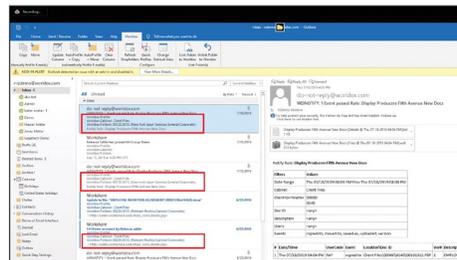
"Active Profiling" Technology Offers Helpful Suggestions on Where to File Your Documents and Emails

If you can navigate a desktop operating system (Windows preferred) you'll find Worldox intuitive and easy to use.

Worldox monitors the desktop operating system and jumps into action when users send an email or create, open or save a document. A dialog box opens to profile the document and classify it so that Worldox knows where to store the metadata associated with the document and how to find it again. Profiling also triggers audit trails to track document movements and access. *See Figure 1 on page 5.*

Worldox Active Profiling technology shows suggested or predictive filing criteria, or heuristics, for documents and emails. Heuristics derive from historical data on how an individual user and all users filed similar content. *See Figure 2 on page 5.*

From a list view, users can select several items and create a document profile automatically (auto-profile) from the heuristics. Users can override filing suggestions by manually selecting different filing values and saving documents to a new location. Administrators can configure firmwide heuristics settings but Worldox does not automatically file content – the user remains in control of filing decisions.

From the Microsoft Word and Excel ribbons, users can conduct a search for a document name or ID, or other content in a Word document and the result displays in Word or Excel. The tabbed resources also allow searches for records with the same profile as the open document (i.e., find files like this one).
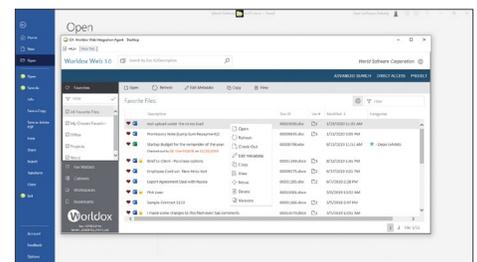
Users can also search their favorites and open quick-saved documents for further editing and profiling inside Word. And, while editing a Word document, users can set Outlook tasks and notifications such as setting a deadline to draft a document or to get notified based on metadata or any audit trail events.

Worldox has a new and more responsive email engine that works on the Microsoft Exchange Server. All processing is done on the Exchange server to increase performance time. Drop folders that link to Worldox get created automatically for favorite matters. Users can also create Worldox folders in Outlook and link or unlink them to matters in order to copy or move messages. In addition, filing from mobile devices and the Outlook Web App are now supported.

Worldox Web 3.0

Worldox Web 3.0 is not the same as Worldox Cloud. The Cloud product is Worldox Professional pushed to a desktop client via Microsoft Remote Desktop Protocol (RDP). World stores the customer database in the Rackspace environment.

Worldox Web 3.0 allows Worldox Professional and Enterprise users to remotely access their documents at no additional cost. To get started, you will need to install the Worldox Web Integration Agent (WdSaaS) on a Windows PC. The Agent will request user credentials and the URL location of the Worldox database, and then a web browser will be opened to access the database from your desktop. *See Figure 3 on page 5.*

The Web 3.0 interface can do most of the same tasks as the desktop client. A global search box sits on top of the browser. Users can filter search results in the main window, hide comments, choose columns to display and make the view a favorite one.

Navigation tabs along the left side of the browser give users access to selected Favorites, Matters, Cabinets for clients and matters, Workspaces to organize files into virtual projects and Bookmarks. Users can apply filters to narrow the list view in selected tabs.

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For example, you can choose documents from the list view and use commands above the window to edit metadata, copy files or view them inline. Additional commands (checkout, move, delete, view versions) can be accomplished with a right-click feature.

The advanced search button brings up templates to search and filter results from the database with user or global search criteria. Each model provides a form search with associated document fields such as document description & ID, date modifiers, cabinet and the ability to search document text.

The Direct Access button in the upper-right corner of the browser provides a shortcut to documents that are based on the profile values or context of a selected file. One-click gives immediate access to other documents stored for the same client, matter and document type. The Project button enables users to browse to an internal Worldox file (.wdl) that is saved to the local PC or device.

Integration and Collaboration
World sticks to its knitting in order to help legal professionals store, retrieve and secure documents while leaving non-DMS functions to integration partners. Worldox has third-party integrations and connectors for time and billing, bulk archiving, knowledge management, e-discovery, collaboration and scanning.

Rather than build out a collaboration platform to share and collaborate on document review and editing, Worldox integrates with WorkShare via Worldox Connect. Using Workshare's commenting and comparison features, Connect users can securely, rapidly and accurately communicate about document changes with colleagues.

Multifunction printer (MFP) providers — Canon, Fujitsu and Konica Minolta — use Worldox's one-touch profiling feature to send output to Worldox. For example, Canon Image Runner Advance

MFPs support an Authorized Send (A-Send) feature that allows users to scan documents to folders that are available on the network. The Worldox Add-On to A-Send gives Worldox users the ability to scan and profile records to Favorite Matters, Quick Profiles, Workspaces and Bookmarks from the MFPs.

Pricing is perpetual for the Professional and Enterprise desktop products. There is a $460 one-time cost per user with a $105 annual fee per user for maintenance, support and software upgrades. World is opening a subscription option for the desktop starting at $20 per user per month. Worldox Cloud is currently $44 per user per month but the company is looking to reduce that cost as more customers adopt the cloud version.

Who is Worldox?
Founded in 1988, Worldox provides document and email management platforms for small and midsize law firms and corporate legal departments. More than 6,500 organizations in 54 countries rely on Worldox.

Why should you consider Worldox GX4?
- Users can easily access the documents and emails they need when they need them.
- Documents and emails can be organized by any criteria including client relationships, legal matters and projects such as court proceedings or discrete transactions.
- Remote access to documents and emails is available via a web browser on any device at no additional cost.
- Low cost and the ease of use lend themselves to quick installations, rapid return on investment and high user adoption rates.

Try Out World Professional For Yourself!
Please visit www.worldox.com to find out which version of Worldox will best suit your document management needs.

VIDEO REVIEW
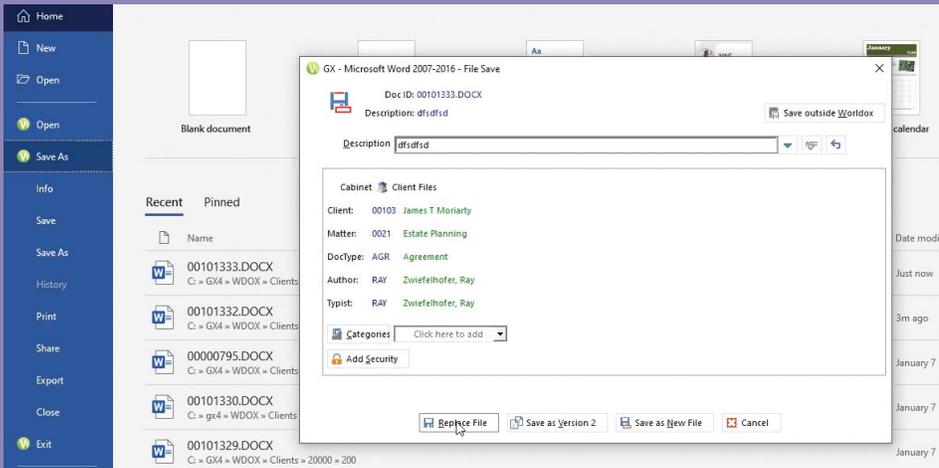Click to view a short video review of **Worldox** on Vimeo.

Figure 1: When saving a document or email to the Worldox DMS, a profiling dialog box opens to set values that identify a file. Document Profiles include fields for description, client, matter, document type, author and typist.
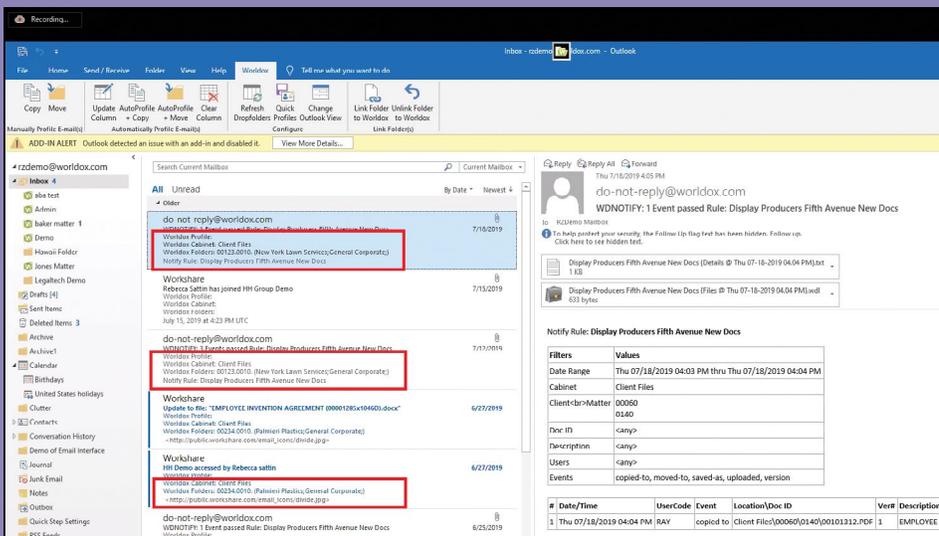

Figure 2: Rather than show heuristics in the context of an email or wait until a profiling dialog box opens, Worldox surfaces the filing aids in folder list views and search results for users to make immediate filing decisions without opening documents and bulk file documents to the DMS.

Figure 3: The Worldox GX4 Web Integration Agent desktop interface looks and feels like a web browser. The same technology used to monitor the desktop client is used by WdSaaS to control and redirect calls to open and save Word documents to a customer's Worldox database. The agent also sends all commands from the web desktop to the database.

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