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Hot new products for lawyers and law office administrators.

Effortless Document Management

By Neil J. Squillante
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Document management systems work best when everyone in your firm creates a detailed profile for every document. This enables anyone to instantly find a document hours, days, and years later. With lawyers perennially in a hurry, the document profile process should take as little time as possible. Human fingers won't get any faster anytime soon so the answer lies in intelligent automation.

Worldox GX4 ... in One Sentence
Launched last week, World Software's Worldox GX4 is a document management system designed to streamline document capture and facilitate document access from any device.

The Killer Feature
Worldox features Active Profiling technology to automate the creation of document profiles. In particular, the Follow Me Favorites feature keeps track of which files you worked on recently, presenting you with these choices in the Open and Save dialog boxes. If you choose from among the options in the Save dialog box, you need only name your document and assign a document type as Worldox will enter the remaining profile information based on where you've chosen to file it.

In addition to listing recently accessed Cabinets, Follow Me Favorites also displays your designated Favorite Matters and Quick Profile tabs. These additional choices further minimize how often you'll need to create an entirely new document profile.

Other Notable Features
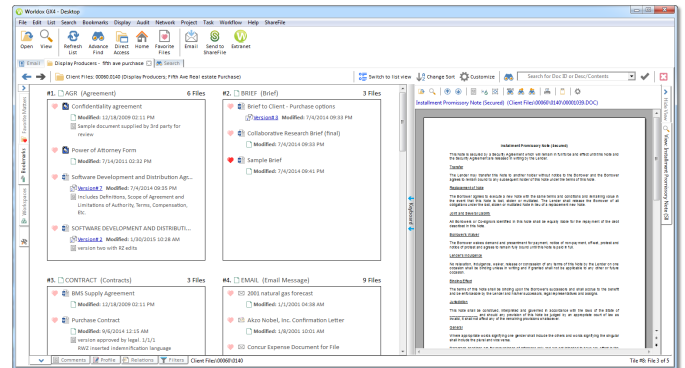Worldox also automates email capture by integrating Active Profiling with Microsoft Outlook. Using a proprietary heuristics algorithm, Worldox monitors your incoming and outgoing email, assigns client/matter data, and queues these messages for your review. This enables you to batch file your email with one click. You can also have the folders for your Favorite Matters appear in Outlook, enabling you to move email into Worldox as well as access previously filed email.

You'll find similar automation in Microsoft Word and Excel thanks to a new QuickSave toolbar icon with which you can access existing documents and save new documents. This toolbar also enables you to search Worldox from Microsoft Office.

The company also enhanced the Worldox client. For example, Worldox now offers user-defined categories (tags) that you can apply to documents. You can then sort, filter, and search using these tags. This enables everyone in your firm to customize Worldox in a way that suits their personal style.

Inline searching offers another way to find documents. The new inline document viewer within search results enables you to view documents without opening them. In addition to sorting search results by categories, you can also sort them by document type, date, and other fields from document profiles.

"It's not easy to build a product that is super powerful and feature rich yet simple to use, so I applaud our development team for doing just that with Worldox GX4," World Software President Ray Zwiefelhofer tells us. "With Executive summary views, one-click saves, and active email profiling, our initial test groups have been impressed with the ease of use and productivity gains."

What Else Should You Know?
Pricing for Worldox GX4 starts at $460 per license. If you don't want to maintain a server, the company offers Worldox GX4 Cloud, which it hosts in secure data centers. Midsize and large firms can opt for Worldox GX4 Enterprise.

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