

CONTENT SECURITY:



Protecting ALL of your firm's valuable content

by Ray Zwiefelhofer, President, Worldox

It's a high likelihood that your firm knows about many of the recent security breaches in the market. It is also highly likely that you are going through your own checklists to ensure you protect and secure your valuable client documents. Unfortunately, it is far less likely that you'll achieve this checklist before the next security suggestion or best practice hits your desk.

Security around your electronic documents can be thought of as rings. The outer ring would be your building and server room security, your password policies, and authentication procedures. The middle ring would be electronic server security, firewalls, intrusion detection, and other measures such as ensuring that patches are up to date. Finally, the inner ring would be your content/document management system. Think of the outermost rings to protect against outside threats, and the inner one to protect against internal ones. The document management system at the core would allow you to secure sensitive information such as HIPAA-related files and other documents containing personal information. Thanks to detailed audit tracking, a clear picture is available for activity on any matter or document. While I've been in this market for long time, I am NOT an electronic security expert. If you're a small to mid-size firm, hire an outside consultant to ensure these "rings" are looked after.

While thinking about the security challenge we are facing, not just in the legal but overall market, my thoughts went to the paper documents currently sitting on my desk. These paper documents are not secure, not traceable, and can easily be copied or taken by another. Even if we haven't read a headline such as, "Attorney leaves contract at Starbucks, content leaked to public," it doesn't mean that such a thing doesn't happen. Unfortunately things like this do occur, but they are off the radar because the parties involved don't want to draw attention to it.

Why do we still have so much paper in what is now an electronic world? Personally for me, it is for several reasons: I love the familiar size and format, I can print contracts and easily mark them up and comment, and when I travel I print itinerary and client information to have readily at hand. In spite of all of these reasons, we ARE a digital office and own a document management solution and

scanners and mobile devices. I try hard to be paperless but I am just not comfortable reviewing a contract on my small iPhone. Even my laptop cuts the page in half, and personally I prefer to see a page in its entirety as I review it.

Due to reasons I just mentioned and other factors, we have a certain volume of paper documents that put us at risk as they are a non-traceable and unsecured form, and probably contain sensitive information.

Here are my thoughts about reducing this risk area:

First, have a plan to make your paper digital so it can be secured and audited. Many great scanning solutions for the legal market allow you to scan directly into your document management system's matter folder. Fujitsu has had a nice personal scanner for ad hoc jobs that hit your desk. This allows quick scans without walking out to the large MFD copier. Also, for large jobs, vendors such as Canon have taken a keen interest in minimizing the steps to get a paper document into a DMS. Their recent Scan to Worldox product is by far the easiest scanning solution I've seen and I encourage you to check it out.

Second, have a thought-out, secure plan to allow mobile/remote access to these documents. If employees can't easily get to their matter files for remote work, they will print or save to a flash drive so they can work remotely. These documents are in essence turned out "into the wild" and all tracking and protection are lost. A solid legal DMS such as Worldox provides powerful, flexible remote and mobile solutions. Whether your remote workers use their home PC, work laptop, or mobile device, they will have secure access to their matter folder and can easily work outside of the office.

Third, there are new devices hitting the market that help to address this paper solution. I wrote an article last year about my introduction to Sony's new Digital Paper device, a document-sized lightweight electronic paper replacement. I am about a year into using my device and will say it has replaced MOST of the need to hit the Print button for me. As with any new technology it continues to evolve, and the latest release allowed for long device password protection and device encryption at rest. This means that if your device gets stolen, the documents and notes on

it are encrypted to prevent content leakage. I highly recommend that you check out the Sony Digital Paper device if your organization strives to be a "less-paper" office.

Efficient methods that help users save their documents into a digital matter file, as well as easy-to-use mobile tools, will go a long way to prevent content leakage of paper documents. Hire a consultant to assess your environment and provide a report on your risks. You can't put a price on the peace of mind you'll have after safeguarding all your documents.

Mr. Zwiefelhofer has over twenty five years of product solution experience within the legal technology market with expertise in AMLAW 250 and Fortune 500. He was a President, CEO and CIO at several software solutions startups and the CTO at a Fortune 500 company. Those companies include Bowne, Imagineer, Equitrac and Diebold. Prior to joining World Software, Ray was the Founder and CEO for nQueue, a global cost recovery company.

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