

The law firm of Barry Yellin safeguards documents with Worldox Cloud Backup and leverages PDF content more effectively with contentCrawler for Worldox and the Productivity Suite.



By **Barry Yellin**, Counsellor at Law
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Challenge:

The challenge was threefold. First, we needed to implement a reliable, easy-to-manage backup solution for Worldox. Second, we needed a better way to leverage PDF content. Third, we wanted a document comparison tool to replace an existing PDF-editing tool.

Solution:

Implemented Worldox Cloud Backup, contentCrawler for Worldox and the Worldox Productivity Suite.

Result:

Solid, reliable backup solution, ability to search the content of PDF files and a feature-rich comparison tool and PDF editor.

As a small two-person firm, we recognized the benefits of Worldox several years ago. Worldox is the core of our technology in our practice and serves our document management needs beautifully.

When we started discussing our needs, Laurie Odgers, of O2 Consulting Group, our Worldox consultant, recommended that we look at the offerings from Worldox. We were thrilled to learn that Worldox could provide certain add-ins to work right within our existing Worldox installation.

Barry Yellin, Counsellor at Law, recently left a larger practice that provided backup services to start a solo practice. One of the challenges that came out of the move was the need to have a solution that would provide an easy-to-manage, seamless, reliable backup for their documents and the Worldox application. Laurie recommended the Worldox Cloud Backup. We looked at the solution and it was a perfect fit. It was very affordable and it runs in the background to back up our Worldox documents and the Worldox application on a prescribed schedule. It is installed on our indexer and now we get a daily report about the status of our backup. We like the fact that we have Laurie and Worldox Technical Support to rely on if we have any issues. We hope we never need it, but the peace of mind knowing that we can restore a single file, the whole repository, and more important, any part of our Worldox program, is priceless.

Our next challenge was to find a way to leverage the ever-growing PDF content in Worldox. We, as many firms do, have an ever-growing body of PDF content, most of which is not searchable by content. Profile searches did not always yield the PDF content we were looking for. Laurie recommended that we look at contentCrawler, an offering from Worldox's partnership with DocsCorp. Again, we acquired what we needed in a one-stop shop with this very affordable solution. Now that contentCrawler is installed, our searches for PDF content are much easier and more effective.

**Barry Yellin,
Counsellor at Law, PC**

“We are thrilled to have the full version of compareDocs that allows the comparison of Word to PDF and PDF to PDF files. This solution has saved us an enormous amount of time and effort when comparing a variety of types of documents.”
- Barry Yellin,
Attorney at Barry Yellin
Counsellor At Law, PC

Our last challenge was to add a document comparison tool and to replace our existing PDF-editing tool. The Worldox Productivity Suite was recently updated to include the full, feature-rich compareDocs and pdfDocs, so this was an easy choice. The cost savings of acquiring this software via the Worldox Productivity Suite was impressive. Being a small company, we always appreciate being able to get top-shelf software at very affordable pricing. We are thrilled to have the full version of compareDocs that allows the comparison of Word to PDF and PDF to PDF files. This solution has saved us an enormous amount of time and effort when comparing a variety of types of documents. We love the clean and very intuitive interface of pdfDocs.

Worldox remains the hub of our technology. The additions of the Worldox Cloud Backup, contentCrawler and the Worldox Productivity Suite allow us to have a solid, easy-to-manage backup solution and to quickly locate all of our content in Worldox. We continue to find Worldox to be an invaluable tool. With the recent additions of the Worldox Productivity Suite, we were able to have a complete solution for document management.