BLI Solution Report

Worldox®

Worldox GX4

Features & Productivity

Usability

IT Admin & Security

Support & Training

Value

Product Snapshot

Product: Worldox GX4

Version: 14.0 (Professional) 14.4 (Enterprise and Cloud)

Software Developer: World Software Corporation

Web: www.worldox.com

Phone: 201-444-3228

For more information on this solution and others, see BLI's comprehensive coverage at www.buyerslab.com/bliq.

About BLI: Since 1961, BLI has been a leading test laboratory in the world of digital imaging equipment. BLI is completely independent in all of its testing processes and subsequent reporting. All of BLI's product evaluations are conducted by highly experienced employees in its on-site testing facilities in the United Kingdom and United States where hundreds of new copiers, printers, wide-format devices, scanners, faxes and multi-function (MFP) products are evaluated and reported on each year.

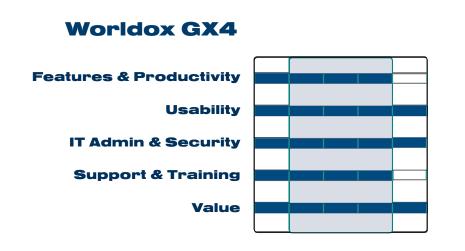## OVERVIEW

Legal professionals deal with thousands of critical documents—client matters, case files, emails, contracts and more—that need to be properly stored and readily accessible at any moment. Worldox GX4 is a multi-user document management package tailored for the legal market that provides a range of tools designed to simplify electronic document filing and retrieval, ensure accuracy when storing files and protect critical documents. The core target audience consists of mid-sized law firms and legal departments in large corporations, although the solution is flexible enough to scale from solo practitioners to organizations with upwards of 1,000 users.

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Benefits

STORE FILES PROPERLY FOR EASY RETRIEVAL – Accurate, efficient document storage and advanced search functions ensure that files can be found quickly.

WORK THE WAY YOU'RE USED TO – Tight integration with Microsoft Word and Outlook let employees work within those applications to store and open files. Users can also launch the dedicated Worldox client. In Outlook, users have drag-and-drop access to Worldox folders with quick profiles, dynamic profiling of emails with use, and more.

BULLETPROOF DOCUMENT SECURITY – Administrators can set Ethical Walls to prevent some employees from viewing documents where there might be a conflict of interest or to limit potential access to only those who need to see particular client matters.

STREAMLINE PROCESSES BETWEEN APPLICATIONS – Worldox integrates directly with a range of third-party software including Microsoft Office, law practice and financial services systems, time and billing applications, and MFP scanning solutions.

WORKFLOW-BASED PRODUCTIVITY – The Worldox GX4 system supports optional workflow and task management to ensure documents are routed to the correct people and important tasks are completed on time. For firms of 25 and under, this optional module also includes PDF creation and the ability to compare two documents to see changes—even between documents of different file types.

OUR TAKE

Among the dozens of document management systems BLI has evaluated, not one delivers as wide a variety of features uniquely tailored for the legal market as Worldox GX4. It employs organizing concepts used in the legal industry (such as Client Matter, Author and Typist) to help legal professionals correctly tag and quickly retrieve electronic documents associated with their firms' cases.

The solution enables users to pull in just about any electronic document that might be germane to a case, regardless of its source: scanned images, Microsoft Office and PDF documents, emails and attachments, and even media-rich PDF Portfolios. Legal-specific indexing fields enable users to accurately file those documents in a standardized way so others can find them. Handy UI conventions such as one-click access for users to their "Favorite Matters" and "Favorite Files" make interacting with the system faster and more convenient. Worldox GX4 also offers legal-market features for ensuring document security and aiding firms with compliance issues. As expected, the system offers full version control (so previous versions of a document are retained) and audit trails (to see who has accessed and/or changed files). Moreover, the platform employs the concept of "Ethical Walls": Administrators can create highly specific access paths allowing or blocking access to specified matters or clients, so practitioners in one area are not privy to clients or cases in another. Administrators can also set document retention rules to meet guidelines set by government legislation and entities (such as the SEC). Integration is another strong suit. In particular, Worldox GX4 delivers impressive integration with Outlook, enabling folders in Outlook's UI that match favorite matters set in Worldox.

With its focus on document filing, retrieval and sharing and less on capture and processing, the solution lacks some features—such as extensive document-markup tools and the ability to split/combine documents— found in traditional "mainstream" document management systems. This is likely less of an issue for law firms since such functionality is typically reserved for e-Discovery document review platforms. Also note that two very important features for the legal market, redaction and Bates numbering, are delivered as part of the extra-cost Productivity Suite and are supported only for PDF documents. Still, the unique features and excellent usability of Worldox GX4 make the platform a must to consider for law firms or legal departments looking for a scalable electronic document management system. Worldox literally speaks the language of legal pros and works the way they work, which can boost worker productivity and ensure that documents can be located by all stakeholders in a firm.