
Advantages of a

Document Management Solution

Over the Windows Folder

By Ray Zwiefelhofer

President, World Software Corporation



In my experience, these are the top two advantages of utilizing a document management solution (DMS) over simply storing documents in a traditional Windows folder structure:

1. the ability to quickly find documents
 2. the ability to manage and secure documents
- Windows may be fine for a one-person shop. Perhaps you're able to save and store files consistently, so they can be easily found. That simple Windows approach becomes less viable with additional users. It is in the multi-user environment – with large documents sets, requiring consistent file-handling workflows and tools – where a DMS really shines.

The difference is improved access and control:

Consistent, firm-wide conventions for saving documents

With a DMS, you create a special form used to save files. This form uses fields tailored to your firm's business, fields such as Client, Matter, Doctype, and Author. In a DMS, saving is also profiling, which elicits correct, necessary information about documents. This greatly reduces entry errors.

Validated input

Each field in the above-mentioned form offers pre-populated, "validated" choices. That means fewer errors and spelling variations, and a standardized way to classify, store and find similar files.

Fast searching, including full text search

Documents are "indexed" in a DMS, enabling fast, flexible searching. You can search for single or multiple keywords in file names or in

text. You can also search by key identifiers used to profile documents as they are saved – which is where the real power of enhanced DMS search tools comes in.

Matter-centric folders

Another great advantage in DMS is the ability to create a logical folder structure, consistent with how you actually work. Everything is determined by the fields used on the original profile form. The net effect is, all files saved for a particular client and matter reside in a unique folder. This same profile form is also used for saving emails, scanned files, graphics and audio clips. So every file relating to one matter ends up saved in the same physical location.

Built-in document viewers

Built-in viewers in a DMS enable viewing and previewing all those different file types without opening documents, without the need to have source applications installed. (*Note: Worldox viewers support over 300 file formats, and offer useful tools, such as the ability to cut and paste text from the viewer to utilize in other documents.*)

Document Security & Compliance

This consistency of file naming and storage enables targeted security. The Worldox "Ethical Wall" feature is a great example, giving you a demonstrable, audit-worthy way to manage sensitive files, so only those who need to see such documents can see them. Built-in legal hold, archive and deletion rules offer additional ways to secure documents and comply with regulations. Worldox also includes advanced audit trail features that track file movements – who accessed files and when, and what happened to those files.

Offline operations

While networks are fairly reliable these days, a DMS can also be set to "shadow" (mirror) a predetermined time range of documents to a local shadow directory, allowing work to be done offline in case of network outages occur.

Collaboration and version integrity

As you open documents in a DMS, those files are automatically locked to prevent simultaneous changes from other users. Modified files can also be versioned and annotated, to archive a clear history of revisions.

Summary

A DMS can protect and preserve your firm's most valuable property (documents, emails, images), while enabling fast search and facilitating safe collaboration. Even better, a DMS standardizes document related workflows, making it easy to train existing users and new hires.

Mr. Zwiefelhofer has over twenty years experience within the technology and legal services market, offering professional, consulting, technology management and product solutions with an emphasis on AMLAW 250 & Fortune 500. Having founded and served both President/CEO/CIO positions at software solutions startups and CTO at a fortune 500 company. Prior to joining World Software Ray was the Founder/CEO for nQueue a Global cost recovery company where he patented and spearheaded the change from a hardware based to software based cost recovery model. Prior companies include, Thomas Kinkade Network, Bowne, Imagineer, Equitrac and Diebold.

