

Where did I save my document??

By Robert Kinnell

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As computer consultants, that's a question we hear all too often. An answer to the question is WORLDOX (developed by World Software Corporation). With WORLDOX, you don't have to "know" where you saved the document because WORLDOX takes care of knowing for you, significantly reducing the 'human error' factor that contributes to the "mysterious disappearance" of documents (can't remember the exact folder where you saved the document, typos in the name, saved in the wrong folder, someone else saved the document and you can't get in touch with them to ask where they saved it, etc.).

WORLDOX is an award-winning Document Management System (DMS). The WORLDOX DMS knows where the document is located, and tracks when the document is moved, copied, opened, viewed, e-mailed or saved, and who performs each of those actions on a document.

What's the bottom line? In most companies, the bottom line is money... "How can we make more of it and keep more of what we make?" The multiple features of WORLDOX can increase productivity, resulting in more billable hours. If an attorney bills at \$250/hour and saves 15 minutes a day by not having to manually find documents, this amounts to a daily savings of \$62.50, or \$312.50 per week. In addition to the time savings achieved through easier document location, Worldox nearly eliminates accidental document deletions and save-overs. If anyone in your organization has saved over a document (an unrecoverable mistake), you will understand the value of this feature. You can also save and track multiple versions of the same document. If your firm is concerned with submitting documents to government agencies, the benefits of version control will be readily evident to you.

Here's how WORLDOX works.

Let's say you have created a document and then go to save the document. As soon as you attempt to save the document, WORLDOX will ask you to "Profile" the document, and will ask for information like Client Name, Matter, Document Type (Memo, Letter, RFP, E-mail Message, Settlement, etc...), Document Title and Description of the document. The descriptions can be up to 5,000 characters (You can be really detailed when describing a document). And based on the Profile information, WORLDOX will save the document where it should be saved. Now, jump ahead three weeks (after you've come back from vacation) and you want to retrieve the document you saved three weeks earlier. You can tell WORLDOX to search for the document based on any of the information you inserted into the Profile page. Even if you can't remember ANY of that information (that must have been a really nice vacation), you can tell WORLDOX to find the document based on a string of text you typed in the document. WORLDOX will find the document in usually 2-4 seconds. Or, if you really want to be lazy, you can just have WORLDOX show you a list of recent documents you worked on. You can even select how many recent documents appear in your list. It doesn't just have to be documents you created. It can find documents created by anyone. So if you know that a secretary named Jane Doe worked on a document for you in the last week (or whatever time frame you choose to use) for the ACME Corporation, you can just ask WORLDOX to show you all the documents Jane Doe created in the last seven days for the ACME Corporation, and in no time it will display those documents to you. Documents can also be linked to each other using a feature

called Related Documents. It is just a matter of a few mouse clicks to ask WORLDOX to show all other documents that are related to a document. Nice.

WORLDOX, by default, integrates with the Microsoft Office suite, WordPerfect, Microsoft Outlook, GroupWise, Adobe Acrobat and many other programs, and can be configured to integrate with many other 'non-standard' applications. To WORLDOX, any file is considered a "document". So, e-mail messages, images, e-mail attachments, etc are considered documents and can be Profiled. WORLDOX provides a neat feature called the Drop-Zone that allows you to drag-and-drop files into the DMS right from your desktop.

Security is another one of the great features of WORLDOX. It allows you to set very granular security on documents. Using the default security built into many applications like Microsoft Word, you can only secure a document by setting a password. WORLDOX goes well beyond that by not only allowing you to set a password on documents, but also allows you to decide who can see if the document exists, who can read, who can write, who can re-profile the document, who can delete the document and who can alter the security settings on a document.

WORLDOX provides an Undelete feature that allows you to retrieve documents that were deleted (accidentally or otherwise) and need to be retrieved. Those of you in Windows server environments who have accidentally deleted documents know how handy this feature is. In typical Windows environments without WORLDOX, a Network Administrator would have to resort to last night's tape backup to retrieve the document (which would not have any of the changes you made to the document since the last tape backup. With WORLDOX, the document can be undeleted quickly, and with very little effort.

WORLDOX provides world-class document management functionality in a package that is affordable and manageable within a small firm. If you would like additional information on WORLDOX or would like to arrange a demo, please contact me at 703.876.5577 x487 or rkinnell@compasscomputer.com.