

INTRO TO DOCUMENT MANAGEMENT SYSTEMS

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A vertical bar on the left side of the slide, transitioning from orange at the top to blue at the bottom.

WHAT IS DMS

System to capture, track, store electronic documents such as .pdfs, word processing files and digital images of paper-based content.

Key Components of DMS

- Document Capture
- OCRing
- Storage
- Metadata
- Versioning
- Security
- Indexing
- Retrieval

Objectives of DMS

- Reduce lost and misfiled documents
- Provide faster search & retrieval
- Reduce amount of physical space used to store documents
- Better organize existing documents

TYPES OF DOCUMENT MANAGEMENT SYSTEMS

- Cloud based
 - Stores your files in cloud making them accessible anywhere you have an internet connection
- On Premise
 - Stored on a local server at your location
- Hybrid
 - Combination of both

SOME MAJOR PLAYERS

- iManage
- NetDocuments
- Worldox (acquired by NetDocs)
- ProLaw
- Sharepoint
- Other suggestions?



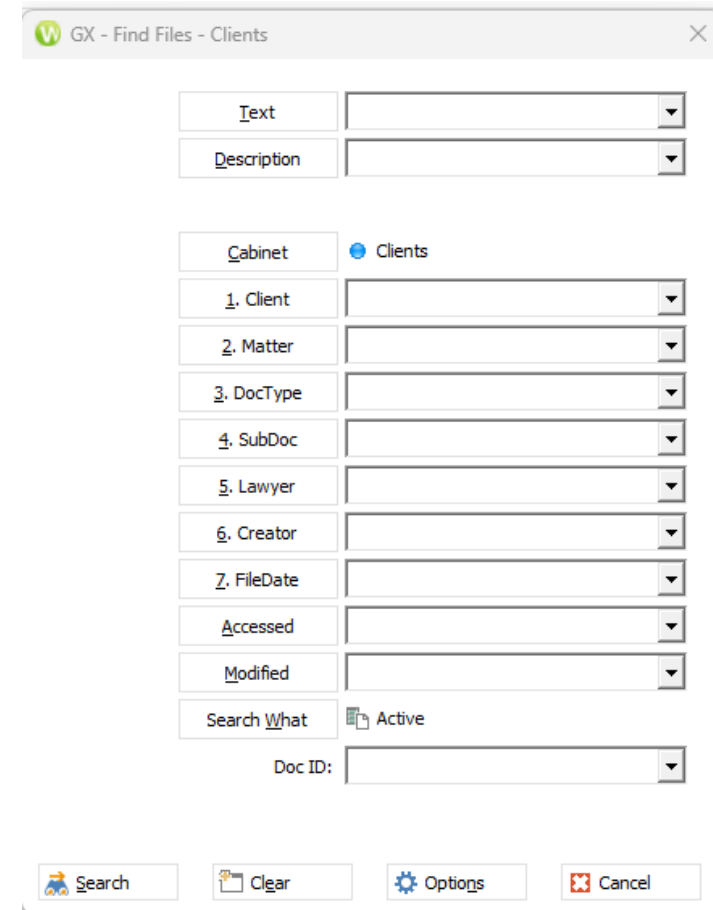
- Full Disclosure –

- I have no experience with anything other than basis windows folder structure
- Worldox

WORLDOX SEARCH BOX

Search box lets us search by:

- Client
- Matter
- Can drill down further
- Text
- Description of document name
- Doc ID



The screenshot shows a search window titled "GX - Find Files - Clients". It features several search criteria and filters:

- Text**: A dropdown menu.
- Description**: A dropdown menu.
- Cabinet**: A dropdown menu with "Clients" selected.
- 1. Client**: A dropdown menu.
- 2. Matter**: A dropdown menu.
- 3. DocType**: A dropdown menu.
- 4. SubDoc**: A dropdown menu.
- 5. Lawyer**: A dropdown menu.
- 6. Creator**: A dropdown menu.
- 7. FileDate**: A dropdown menu.
- Accessed**: A dropdown menu.
- Modified**: A dropdown menu.
- Search What**: A dropdown menu with "Active" selected.
- Doc ID**: A dropdown menu.

At the bottom, there are four buttons: "Search", "Clear", "Options", and "Cancel".

Worldox Side Panel

You can also navigate for your documents on the side panel

