INTRO TO DOCUMENT MANAGEMENT SYSTEMS

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)
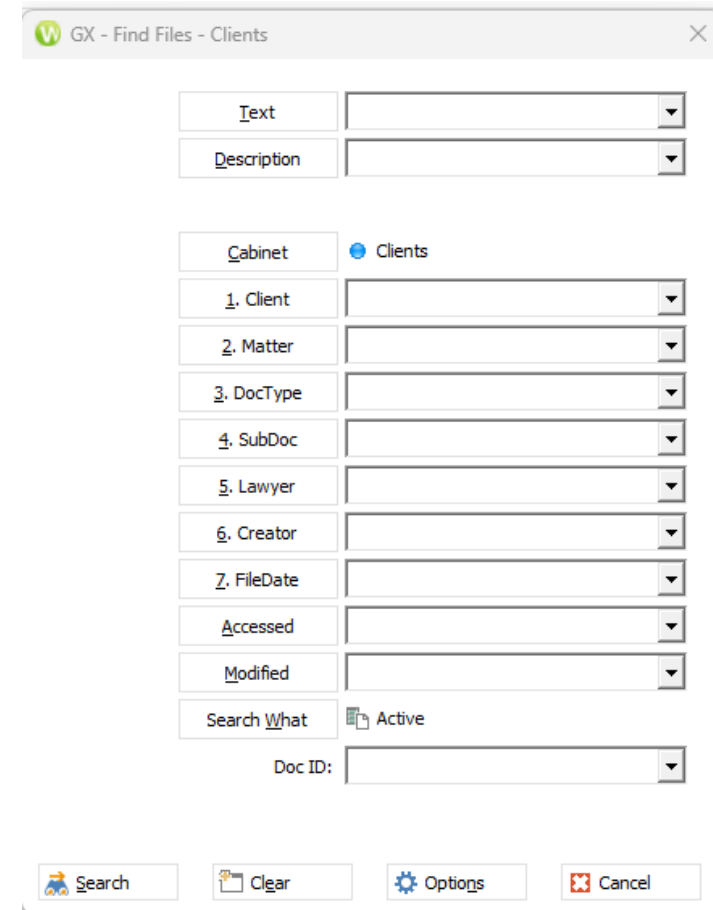- ProLaw
- Sharepoint
- Other suggestions?

- 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

Worldox Side Panel

You can also navigate for your documents on the side panel