

DOCUMENT MANAGEMENT SYSTEM CONSIDERATIONS – CHECKLIST

❖ IMPORTANT FACTORS

- **ON-PREMISE:** SOFTWARE IS INSTALLED ON A SERVER AT YOUR PHYSICAL OFFICE LOCATION. THIS REQUIRES YOUR I.T. TO SUPPORT/MAINTAIN.
- **HOSTED:** SOFTWARE IS INSTALLED ON A SERVER, BUT CAN BE HOSTED IN A THIRD-PARTY CLOUD SERVICE (AKA HOSTED INFRASTRUCTURE) LIKE PROCIRRUS, UPTIME LEGAL, RACKSPACE, ETC.
- **CLOUD:** THE SOFTWARE IS WEB-BASED (AKA SOFTWARE AS A SERVICE), WHERE YOU ACCESS IT VIA A BROWSER. THERE ISN'T A NEED FOR AN ON-PREMISE OR HOSTED SERVER.

❖ FEATURES

- **EMAIL INTEGRATION WITH OUTLOOK:** ADD IN FOR OUTLOOK TO EASILY SAVE OUTBOUND AND INBOUND EMAIL.
- **OUTLOOK DROP FOLDER CAPABILITY:** ABILITY TO CREATE MATTER DROP FOLDERS IN OUTLOOK FOR EASY SAVING OF EMAILS.
- **GMAIL INTEGRATION:** ABILITY TO SAVE GMAIL FROM CHROME.
- **WORD, EXCEL, POWERPOINT INTEGRATION:** DMS INVOKES ON AN OPEN OR SAVE COMMAND TO EASILY SAVE FILES DIRECTLY OR OPEN FILES FROM THESE APPLICATIONS.
- **ADOBE ACROBAT INTEGRATION:** DMS INVOKES ON AN OPEN OR SAVE COMMAND TO EASILY SAVE FILES DIRECTLY OR OPEN FILES FROM ACROBAT.
- **KOFAX POWER PDF INTEGRATION:** DMS INVOKES ON AN OPEN OR SAVE COMMAND TO EASILY SAVE FILES DIRECTLY OR OPEN FILES FROM KOFAX POWERPDF.
- **FOXIT PHANTOM PDF INTEGRATION:** DMS INVOKES ON AN OPEN OR SAVE COMMAND TO EASILY SAVE FILES DIRECTLY OR OPEN FILES FROM FOXIT.
- **PDFDOCS INTEGRATION:** DMS INVOKES ON AN OPEN OR SAVE COMMAND TO EASILY SAVE FILES DIRECTLY OR OPEN FILES FROM ACROBAT.
- **FORCED COMPLIANCE:** CAN REMOVE SAVE/OPEN COMMANDS FROM MAJOR APPLICATIONS AND OPTIONALLY FORCE USERS TO SAVE EVERYTHING INTO THE DMS.
- **CLIENT/MATTER CENTRIC ORGANIZATION OF FILES:** ABILITY TO ORGANIZE FILES BY CLIENT/MATTER.
- **FOLDER GUI:** ABILITY TO CREATE FOLDERS AND SUBFOLDERS IN GUI (GRAPHICAL USER INTERFACE).
- **FULL BOOLEAN LOGIC SEARCHING:** ADVANCED/MATURE SEARCH ENGINE, ALLOWING FULL BOOLEAN SEARCHING.
- **TAGGING/CATEGORIES:** ABILITY TO CREATE CUSTOM DATABASE TAGS FOR ENHANCED SEARCHING & FILTERING.
- **INTEGRATED OCR SOLUTION AVAILABLE:** ABILITY TO AUTOMATICALLY ANALYZE IF PDF IS TEXT SEARCHABLE AND CONVERT TO TEXT-SEARCHABLE PDF.
- **DOCUMENT CHECK IN / CHECK OUT:** CAN CHECK DOCUMENTS OUT TO A LOCAL BRIEF CASE AND CHECK THEM BACK IN.
- **LOCAL MIRRORING:** CAN MIRROR CHOSEN DOCUMENTS TO LOCAL BRIEF CASE IN THE CASE OF NO CONNECTIVITY.

- **VERSION CONTROL:** CREATE VERSIONS OF DOCUMENTS.
- **FAVORITE AND RECENT DOCUMENTS:** HAVE BUILT-IN QUICK ACCESS TO FAVORITE DOCUMENTS AND RECENT DOCUMENTS.
- **DOCUMENT, FOLDER, CABINET SECURITY, ETHICAL WALLS:** ABILITY TO APPLY SECURITY AT THE DOCUMENT LEVEL, CLIENT/MATTER LEVEL, AND CABINET LEVEL, AS WELL AS FEATURE SECURITY.
- **SECURITY – ACTIVE DIRECTORY INTEGRATION:** INTEGRATION WITH ACTIVE DIRECTORY SO ALL SECURITY IS APPLIED TO FILES/FOLDERS IN WINDOWS FOLDER STRUCTURE ON THE BACK-END.
- **AUDIT TRAIL:** TRACK ALL FILE TRANSACTIONS AND USER TRANSACTIONS.
- **SCANNER INTEGRATION – COPIER/PRINTER/SCANNER:** INTEGRATION OPTIONS WITH MOST MAJOR MULTIFUNCTION COPIER/PRINTER/SCANNERS.
- **SCANNER INTEGRATION – DESKTOP SCANNERS:** INTEGRATION WITH DESKTOP SCANNERS LIKE THE FUJITSU SCANSNAP.
- **INTEGRATION WITH PRACTICE MANAGEMENT PROGRAMS:** HAVE SOME INTEGRATION CHOICES WITH PRACTICE MANAGEMENT PROGRAMS.
- **INTEGRATION WITH TIME/BILLING/ACCOUNTING PROGRAMS:** HAVE SOME INTEGRATION CHOICES WITH TIME BILLING & ACCOUNTING PROGRAMS.
- **SHARE SECURE LINKS TO DOCUMENTS WITH EXTERNAL PARTIES**
- **CREATE COLLABORATIVE PORTAL FOR EXTERNAL USERS TO EDIT DOCUMENTS DIRECTLY IN DMS**
- **NATIVE SUPPORT FOR MACOS**