NJSBA PRACTICE**HQ**
PREPARED BY Affinity CONSULTING

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**