

Review: Worldox for iPad

By John Heckman

November 2, 2010

Worldox for iPad

www.worldox.com

TechnoScore: 4.6

1 = Lowest Possible Score;
5 = Highest Possible Score

So you're one of the millions of people who have an iPad. While you've already burned more hours than you can count reading eBooks and browsing Facebook, you'd like to actually get some work done too — like reviewing and editing documents. If your firm uses Worldox you're in luck. Seeking to capitalize on the iPad craze, World Software is putting the finishing touches on Worldox for iPad. In this TechnoFeature, legal technology consultant and Worldox expert John Heckman reviews Worldox for iPad. Does this app deliver on its promise to provide mobile document management? John has all the answers for you in his review.

INTRODUCTION

Worldox is a popular document management system used by many law firms. Given the popularity of Apple's iPad, World Software will release a native app early next year — Worldox for iPad. I've tested it for the past few weeks.

Worldox for iPad works well. The company has streamlined Worldox's functionality to accommodate the iPad's limitations and increase speed on the AT&T network, so it does not

offer the full feature set of the desktop solution.

The iPad app accesses Worldox' existing Web/Mobile solution, which your firm needs to purchase and install (the iPad app is free). You need to log in twice — first into the Worldox Web/Mobile server and then into Worldox itself. You can set the screen to remember your login, so you only have to enter it once, although this option obviously poses a security risk since anyone who has your iPad can open Worldox.

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HOW IT WORKS

Worldox for the iPad enables you to search the entire document store on your home server, preview documents (although scrolling through a 50-page document can get a bit tiresome), and check documents out to edit them.

When you open Worldox for the iPad, you see the last document you were looking at, as well as a very limited menu at the top (List/Help, Info/Preview, CheckOut), an Email button, and a Send to button that can be linked to a document editing app (sold separately).

The Original View is preview only. To edit the document you must check it out to Documents to Go, Quickoffice, or an analogous app. The Original View does not always size documents accurately: one or two words at the end of a line may wrap to the next line before what looks like a hard return creates a new line. Changing the zoom of the display does not seem to affect this issue. Hopefully, World Software will fix this issue in the final release.

From the Original View, if you click on "Info" the page turns and you see the Worldox Profile Group information. Worldox users have requested this screen for years. Instead of displaying the Client/Matter numbers you see the actual client and matter descriptions. Similarly, you see full user names and not initials. However, you cannot edit profile information from this screen, although you can add or edit comments.

To edit the document you must check it out to Documents to Go, Quickoffice, or an analogous app.

The "List" option takes you to your most recent operations. From there, you can go to "History" and see your most recently used files ("Favorites") or launch a full profile search against the complete Worldox

document store on your home server. The profile search reflects all the Worldox Profile Groups on your home server and the fields in each.

At the bottom of the List view, you see four icons — a full search magnifying glass, a Quick Access search (all the documents for a given client/matter), Favorites, and a Bookmarks button. This view replicates the desktop Worldox functionality. As you drill down, there is no “back” button, but the previous screen is shown in smaller type (similar to the way Windows 7 displays directory paths: you click on the previous sub-directory to go back).

As noted above, you can edit documents using a companion app. When you have finished editing, you can check the file back in. You can also email the document as long as you have an email account set up on your iPad. Third party apps that convert a Word document to PDF or strip out metadata are not available. In short, you can perform basic file search and edit functions.

Thus, if you are on the road or at a client site you can pull down

and review documents. You can also make minor edits and check them back in. If someone at the office has edited a document and wants you to review the proposed changes, you can do so easily. You can email a document to a client, co-counsel, etc. These features strike me as what lawyers want in a mobile document management application.

If you don't have an iPad, Worldox for iPad is irrelevant. However, it might be an important factor in deciding to purchase an iPad.

LIMITATIONS

Most of the limitations to Worldox for the iPad are in fact iPad limitations. For example, there is no “Back” button so if you select the Help function, you are automatically logged out and have to login again to continue working. There is no multi-tasking, however, iOS 4.2, which should arrive this month, will enable you to switch among apps faster. When you edit a document, there are no cursor keys (al-

though you can enlarge a selection and move the cursor).

In terms of Worldox functionality, some advanced features are not available such as security options and copying or moving email to Worldox. However, if you also have remote control to your desktop, you could use the desktop version of Worldox from your iPad though doing so would be slower and less slick (Worldox for the iPad has been streamlined for speed and efficiency).

CONCLUSION

If your firm uses Worldox and you have an iPad, Worldox for iPad offers slick and convenient document review and processing. Unless you want to spring for a Bluetooth keyboard, editing documents will remain problematic because of the limitations of the touch keyboard. Otherwise, you might prefer remote control as it would give you access to all of Worldox's functionality.

To a certain extent, Worldox for iPad is all or nothing. If you don't have an iPad, it is irrelevant. However, it might be an important factor in deciding to purchase an iPad. If you have an iPad, I would give it a TechnoScore of 4.6 out of 5.

John Heckman of [Heckman Consulting](#) has assisted law firms with technology issues for over 25 years. John has worked with Worldox for over 15 years and is a Certified Consultant and Trainer for Amicus Attorney and other software applications. He is widely published and authors the legal technology blog, [Does It Compute](#).

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