



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.
	Nuance Power PDF Integration: DMS invokes on an open or save command to easily save files directly or open files from Nuance 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 (G raphical U ser I nterface)
	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 MAC OS