



Introducing *Worldox GX3*: the next generation Document Management Solution

Delivery Options White Paper

Overview

World Software Corporation has been developing innovative Worldox Document Management Systems (DMS) since the company was founded in 1988.

With more than 5000 clients in a variety of business sectors – and hundreds of thousands of end-user licenses issued – the Worldox product line is mature and feature-rich. Our philosophy has always been to develop affordable, easy-to-use and easy-to-maintain DMS solutions with world-class technical support. Judging by market acceptance and brand loyalty, this approach is working for our customers.

The most recent version of Worldox – *GX3* – not only takes the core software and feature set to a new level, but also addresses key mobility issues affecting remote offices and remote workers.

The need for mobility

With an increasingly mobile workforce and satellite offices more prevalent now than in past years, traditional IT solutions may no longer be good enough. Remote workers expect the same tool set and user experience on the road as they have back in the home office. They also expect speed, virtually instant access and transparent operation.

To some extent, Citrix and the Microsoft remote desktops serve these needs well, offering solutions that allow users to gain access to their full desktops while working from out-of-office locations.

A Critique of Traditional Remote Solutions

Since we have many clients who take advantage of these more traditional remote solutions, we often ask them, “How well do they work?” The typical feedback we get is that these solutions do work, but are not ideal for the following reasons:

- The Citrix solution is costly to purchase and maintain.
- All necessary applications must work in the Citrix or MS remote desktop environment, as the published desktop does not allow interaction with locally installed applications.

Example: Attorneys who have MS Outlook installed on their local laptops to handle email while traveling will log into their home-office Citrix desktop and load their DMS, but cannot use the local Outlook client to talk to their published desktop DMS to attach files to email. (This is true not only of Outlook, but of all local applications.)

Key point: When using the remote access solutions mentioned above, it's all or nothing; you either work on your local (office) machine, or elsewhere on a published desktop instance of that office machine. Microsoft and Citrix have cleverly "firewalled-off" interaction (except for mouse, printer, keyboard and a few other essential local resources) to prevent memory and configuration conflicts, so there can be no communication between local and remote desktops. This may be advantageous for security reasons, but it is incredibly frustrating for the end-user.

Web-based solutions

Another option is web browser-based products which remotely access your documents with Internet interfaces. In fact, our own Worldox Web/Mobile is one such product.

However, browser-based solutions typically offer limited feature sets in comparison to the full desktop products. Also, as a consequence of web and HTML limitations, the interface (front-end user experience) is inherently different and less user-friendly than what users experience in the best desktop applications. All of these factors mean that additional training is required to use the web system, and that business done from remote locations must be done differently than when in the office.

If data access alone is the key requirement, these traditional solutions are more than adequate. However, if workflow efficiency, speed and ease-of-use are priorities, these choices are not good enough. In effect, your remote work force pays significant penalties to use the available tools. Given the heavy use a DMS receives, these shortcomings are unacceptable.

Brainstorming begins for a new approach...

During the planning phase of Worldox GX3, we decided to prioritize more efficient operations over Wide Area Networks (i.e., satellite offices) and a strong focus on the needs of remote users (i.e., those working at home, on the road or at client sites.)

Many options were evaluated.

The most obvious approach was a full rewrite of the existing Worldox in web/browser-based technology. After all, this has long been an almost default choice for thin transport development. But after thorough consideration, we determined that browser interfaces are simply not up to the task. Compared to the desktop Worldox, a browser-based version would inevitably limit both available features and usability. Too many trade-offs, not enough value.

An intriguing idea emerged. Both Citrix and Microsoft utilize the ability to publish single applications over a remote connection. How would Worldox work as a published app? We embarked on an

experiment to test this and the initial results were impressive; Worldox was loaded over a remote connection from a home office, and then appeared and functioned exactly as if you had Worldox installed locally.

The benefits – central administration, centralized document storage, a proven technology, and the same interface on desktops and via remote – are compelling.

But the big issue here is that same “firewalled-off” interaction mentioned earlier in regards to the operation of Citrix and Microsoft. Local applications – your local copy of Microsoft Word for example – can neither see nor communicate with this “published” Worldox application. As a result, Worldox would not know about File/Open, Save or Save As actions in Office applications, which means it would no longer function as a core DMS system. Worldox depends on interaction with local applications, so the firewall issue is a show-stopper.

The GX3 solution

The solution to local application integration turns out to be both simple and revolutionary– our patent-pending communication architecture called “WDSAAS”.

The Worldox Development Team came up with a scheme some clients actually call “pixie dust”. In fact, it is not magic, but rather a client-server communication application which allows all locally installed applications to have full communication with the published version of Worldox hosted on a remote server.

Example: Let’s say you are using this new *GX3* technology. When you are in your locally installed copy of Word or Outlook, and click File/Open or Save, the remotely published Worldox responds accordingly with profile or versioning prompts. Even third party applications such as case management solutions installed locally have full API communication with Worldox.

The result is that Worldox looks and feels the same, whether used locally or via remote hosting – either in your data center or off-site. To remote workers, it means transparency – one Worldox that always works as expected at the office, in the home office, satellite office or anywhere on the road.

The added bonus is that there is no new Worldox version to learn for remote access. It’s the same Worldox interface users experience in the home office. That means ***no learning curve***. That is also very good news to the nearly 300 Worldox resellers who install and train our new customers. But for a few new server deployment options and pricing, all versions of *GX3* are much the same.

Bottom line: the distance-nullifying power of the *GX3* solution has no downsides. Worldox *GX3* is essentially one consistent application –wherever you work, whenever you want to use it.

New deployment options

Today's professionals want and expect the ability to work flexibly – wherever and whenever they choose. With the growing availability of high-speed internet access, this expectation grows even faster. In document management terms, *GX3* is the answer you have been waiting for, the innovative tool your professional staff deserves.

It starts with the base, desktop version of *GX3*, called *GX3 Professional*, released in early 2012. By early 2013, two additional deployment options will be available for a total of 3 different delivery options for Worldox *GX3*.

Here is the new product line-up:

- ***Worldox GX3 Professional***

An upgrade for our *GX2* product, this is the “traditional” desktop Worldox. It is the ideal solution for single office, networked environments, or for offices with locally-managed documents (i.e., each office maintains its own local document store and index server.)

- ***Worldox GX3 Enterprise***

This is Worldox adapted for multi-office, remote-access environments. The *Enterprise* version features an add-on server component that allows fast connectivity from on-site desktops, from remote offices and out-of-office machines. It centralizes document storage and indexing in your data center, behind your firewall. This solution is *NOT* browser-based. End users receive the full Worldox application delivered to their desktops via Microsoft published application technology. Worldox interacts seamlessly with locally installed applications ... it looks and feels exactly the same as the *Professional* version.

This solution is ideal for you if you have a centralized document set accessed by remote offices and remote users, and are NOT using a terminal server or Citrix remote deployment model. The Enterprise and Professional model can be combined as a mixed environment to fit your desired approach to accessibility.

- ***Worldox GX3 Cloud (eta Q1 '13)***

This version too is adapted for a multi-office, remote access environment, featuring that add-on server component mentioned above. However, with the *Cloud* version, all of your firm's documents and Worldox are hosted off-site in one of our secure/redundant data centers. This solution is *NOT* browser-based. End users receive the full Worldox application delivered to their desktops via Microsoft published application technology, with the Worldox WDSAAS architecture. Worldox interacts seamlessly with locally installed applications ... it looks and feels exactly the same as the *Professional* desktop version.

Another key differentiator from other cloud type document management offerings is that only Worldox and Worldox-managed files are hosted off-site. You provide the other applications locally.

This “Software as a Service” solution is ideal for you if you want your document management system and documents stored and backed up in top-tier data centers and desire a modest monthly fee and lower startup costs.

At the end of the day, GX3 delivers powerful document management however you want it, via YOUR preferred deployment method.

Requirements

GX3 Professional

See this Web page for detailed technical requirements:

http://www.worldox.com/products/worldox_gx_tech_requirements

GX3 Enterprise*

- Microsoft Terminal Server 2008 R2 with sufficient CAL's for enterprise users. For large environments, multiple terminal servers with a session broker is recommended.
- Worldox Enterprise Client and Server Licenses for each enterprise user.
- Server or VM for Worldox enterprise server software.

GX3 Cloud

- Personal computer or laptop with sufficient memory and speed to run common applications such as Microsoft Office.
- Installed applications suites for daily use such as MS Office.
- Recommend high speed internet connection, with backup connection.

Considerations for both the enterprise and cloud deployment methods.

As your documents reside on the server (not locally), a high speed internet or WAN connection is required. In addition a backup internet connection is recommended.

For more information

For details on these and other Worldox products, please call our Sales Department at **(800) 962-6360** or send email to: sales@worldox.com

*Configuration varies depending on number of users and document volume.