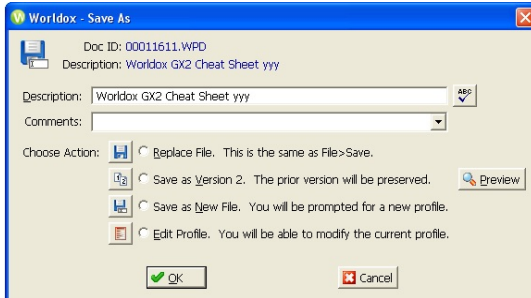


Version Control

Once a document has been initially saved, you can also save it as a different version. Select File | Save As, and the following screen appears:



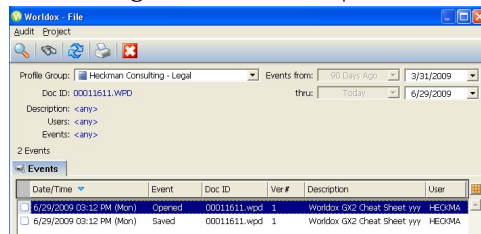
Select the desired option and proceed depending on the option selected. It is desirable to change the description somewhat so you can distinguish versions. As a matter of good practice, save a version when significant changes warrant it. To see the various versions of a document, click the Ver List icon on the button bar or right-click the document and select “Versions.”

Audit Control

Worldox tracks virtually every activity concerning a document. To see who has opened, modified, saved, checked out, checked in, copied, etc. a document, right click on the document listing and select “Audit | File.” You see the audit trail for the latest version of that document.

This enables a user to track the exact history of the document they are concerned with.

Once you see the entries returned by the audit query, you can use “Project | Create” to create a project of those files.



Security

To determine who gets access to a specific document, click the “Security” button when saving a document.

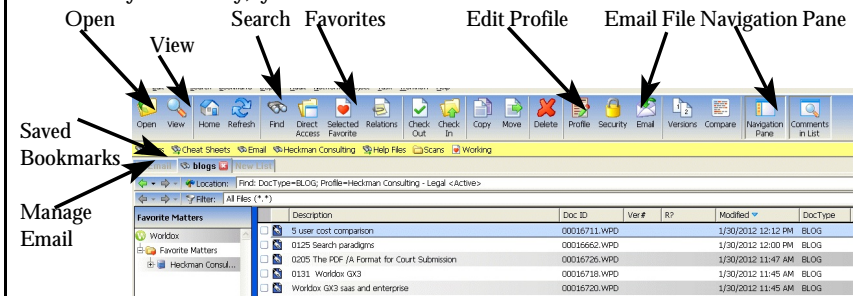
Click “Classify” to select security. Select “Hidden” or “Read Only” to hide the document from other users or make it Read Only. Select “Custom” to add specific users or groups of users.

Click “Add User” or “Add Group” and make the relevant selections. To change existing security, click “Remove” or other options as required.

Worldox GX3 Cheat Sheet

Basic Worldox Screen

Worldox comes up when you select File Open or File Save. When you open Worldox (File Open, or from the Work-Zone or System Tray) you see the basic Worldox screen.



- By default, you start with your last 20 documents, sorted on the column that contains the blue-green triangle in the column header. Click on any header to change the sort order by column or A-Z; Z-A.
- Click on the appropriate icon for other functions:
 - Click the Favorites icon (with the heart) at any time (*e.g.*, after a search for other documents) to see the last 20 documents you worked on.
 - The View icon (the magnifying glass) launches a viewer so that you can see the document the cursor is on without opening it. If you did a full-text search, “View” will show the “hits” in any document you view.

Important: The View feature is one of the biggest productivity enhancers in Worldox. You can copy text from the view feature and paste it into a regular document. You can scroll through the document list and each document will be “viewed” in turn, so that you do not have to open a document to see what is in it. You can print a document from View. Lastly, you can set a default size for view (click on “Window” and select “Save Size & Position”).

- Click the Copy, Delete, or Move icons for those functions (for example to copy an older document as the basis for a new one).
- Find (the binoculars) opens the search screen if the document you want is not on the list (see p. 2).
- Email the document your cursor is on by clicking on that icon.
- Print produces a report of the files listed on the screen, it does not print the document the cursor is on. To actually print a document, right-click and select Print.
- See page 13 for details of the Form Bar at the bottom of the screen



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Searching for a Document

If you need to find a document that is not on the main screen, click **Find** to launch the search screen (or click on one of the “Quick Search” Bookmark buttons – facing page). You may have to select the Profile Group you want. If necessary, click **K** to launch a basic search or select “repeat last find.” Your screen may be slightly different, but the search principles are the same.

There are three ways to enter information here:

- If you know the desired information, type in it the appropriate Name/Comment or Text in File box. Worldox supports “wild-cards,” so typing “prod*” will find “produce” and “production.”
- In addition, you will see a list of words actually in the index when you start typing.
- To get a list of available Client/Matters/Doc Type items to be searched for, click on the labeled button to the left of the text box.
- To see recent searches, click the down arrow to the right of the box (M).
- The Client/Matter/Doc Type fields will auto-fill as soon as they are unique. Thus typing “plea” may automatically fill in “Pleading.”

Open With. Worldox recognizes document types. If you are in Word and try to open a PDF file, a screen will pop up asking you if you want to open the file with Acrobat. Similarly for Excel and other programs.

Boolean Searches

Boolean searches work for both text and Profile Group information.

- **AND.** To find the occurrence of two words in the same document, connect them with the word AND, *e.g.*, January AND bill. Similarly, in the Doc Type screen, “pleading or motion.”
- **OR.** To find occurrences of either word in the same document, connect them with the word OR, *e.g.*, January OR bill. Note: you can also do “and” or “or” searches in, *e.g.*, the Doc Type screen: “bill or letter.”
- **NOT.** To find occurrences of one word but not the second in a document, connect them with the word NOT, *e.g.*, January NOT bill. Or in the Doc Type screen: “NOT email.”
- One word within “x” words of another: first w/x second, By default, Worldox defaults to “within 3” if you simply type two words. That is, “accident damages” searches for “accident within 3 words of damages.”

Customizing Worldox

Users can customize Worldox extensively, including the following settings:

Order of column display. To remove a column from the display, “grab” it using the mouse and drag it off the bar. To add a column, click on any empty space between column headers and select which column to add. Click and Drag the right side of a column header to change the width. You can also drag the entire column to the left. To save the columns, right-click and select “Save Column Template.” Give it the desired name. You can also associate a column format with a given Bookmark/Quick Search

Description	Doc ID	Ver#	R?	Modified	DocType	Size
-------------	--------	------	----	----------	---------	------

By default, the documents may be listed in Outlook-style groupings by date. Right-click on the “Modified” column and select “Hide Groupings” to disappear them. If the document has Versions, the number of the highest version will appear in the “Ver#” column.

The **Form Bar** at the bottom lets you display additional information: Note: when one tab is selected, the others are greyed out.



- “Preview” shows you the top of the current document, as well as the one above and below it in an Outlook-like preview pane. To size the pane, click on “Tutorial” and follow instructions. You may find the main viewer on the toolbar more convenient.
- “Comments” or “Profile” lets you view those elements and edit them on the fly simply by double-clicking on them.
- “Full List” displays only documents.
- “Relations” and “Project” show documents included in those functions.
- “Tags” displays the information about the files in the list sized to show the most common items largest. This is very useful if you want to narrow down the search. Click next to “*.DOC” to see only Word files; click on a doc type to see only that specific doc type, a specific matter to see just that matter, etc.

Moving Legacy Documents into Worldox

Pre-existing (“legacy”) documents *must* be moved into the Worldox system before they can be edited. Documents may be moved on an as-needed basis or in batches. To begin, use the Explorer-type window at the left of the Worldox screen to navigate to the document you wish to move. This is located in exactly the same place as it has always been, but under a “legacy” folder. To move the document, double click it. You will be asked to choose a profile (*i.e.*, “Client Work”) and you will then see a profile screen with the old name of the document inserted as the “Description.”

Fill in the required information and/or change the “Description” (some fields may already be set as a default) and click **K** to move the document. Click “Yes” to open the moved document.

You can move multiple documents at one time if they are all in the same directory and will have the same profile information (Client/Matter/DocType etc.). To do this, select the documents you wish to move by clicking in the check box to the left of the document in the Worldox window. A green check mark will appear. Right-click in the document area and select “Move,” or click the Move button on the button bar (with the Green pointing arrow).

My Workspace

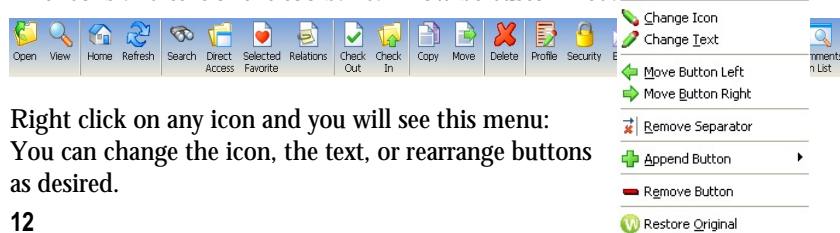
“My Workspace” adds the ability to organize files defined or sorted by directory (it will not organize searches the way that Quick Search Buttons will). Depending on how Worldox is configured, this can be useful.

To create a “Bookmark,” right-click on “My Workspace” and select “Subscribe to Bookmark.” Click on the Green “+” to add a new Bookmark, or an existing Bookmark to subscribe to it.. Multiple users can subscribe to the same Bookmark, making it easier to share files. This can be useful for organizing Projects, Form files, Boilerplate, BriefBank files, etc.

If you use this feature, it will also show you the last 5 Projects you opened.

Customizing the Toolbar

The icons and text of the toolbar can now be customized: 

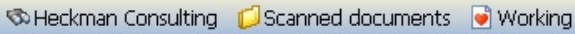


Right click on any icon and you will see this menu:
You can change the icon, the text, or rearrange buttons as desired.


Saving Searches; Quick Search Buttons

Recent searches appear on a separate tabbed search bar labeled “Location.” You can select from your most recent searches by clicking the down arrow at the right of this screen. When you first open Worldox, you see your 20 most recent documents. Thereafter, the most recent search appears by default.

To permanently save a search and give it a name (for example your forms, or all the files for a particular client), first perform the search. Then select Bookmark | Add this list from the menu. Give the search a meaningful name. It will appear as a Bookmark or “Quick Search” button on the second row of buttons. You might wind up seeing something like this:

These searches are  dynamic: if you add new documents that satisfy the search criteria, they will appear the next time you perform the search. If you save a search for Client “Jones,” you can delete the Bookmark when you have finished working with that client.

Quick Searches

If you already know the DocID Number of a  document, click next to “Location” (or hit **Z**) and type the number.

Sorting Search Screens

You can control the order in which items are sorted in any Worldox screen. At the right of the column that is sorted, there is a blue-green arrow. If the arrow points up, the sort is A-Z (or old to new on dates), if it points down the sort is Z-A. To change the sort order, simply click in the column you wish to sort on. A second click changes the sort order.

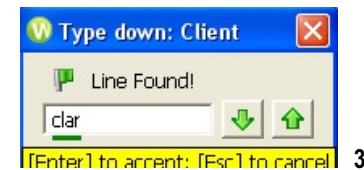
Note also that in some lookups there are two tabs: *e.g.*, “Client Table and “Client Favorites.” Client Favorites represents the last 20 Clients (or Matters, etc.) you have accessed, and can make searches much more efficient.



To set either tab as the default, right-click on it and select “Set as Default.”

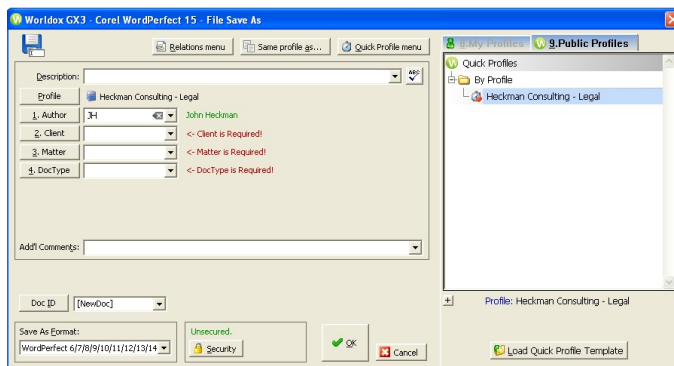
If the list is very long you can search for, *e.g.*, the client, just by starting to type the client name or the client number. You will see the following screen and the selection will proceed to the combination of letters you type :

Everything is searched regardless of the sort order. Type-down search also works on the document list screen. Click an arrow to select the next (or previous) instance.



Saving Documents

When you click on “Save,” the following screen appears. If necessary, change the Profile either by clicking on the “Profile” button or selecting a Quick Profile to the right of the screen. To save your document, simply fill in the fields as desired and click **K**. Some fields are set to record the last item entered and may already be filled in. The options for filling in fields when searching for a document (under “Searching”) also pertain here. Anything you put in the “comments” field is also indexed with the profile. Comments may be used for additional information, key words, critical issues, etc. See p. 14 for Save As options and Version Control.



Same Profile As

Say you emailed someone a document and they send it back to you with revisions. To save the document as a version of the document you sent out, just click the “Same Profile As,” then select the original document you wish to make a new version for. A screen will pop up with an option to save the new document as a new version of the old.

Keywords

If your firm has implemented a “Keywords” table in the Comments field, click in “Comments” and then on the “Insert Keyword” button. This is particularly useful for litigation firms or others that want to have a set list of key provisions, litigation importance ratings or other criteria that they wish to be able to search by. The advantage of using a table is that the terms are always entered consistently and thus searches are more accurate and complete.

Good Naming Practices

How you name the descriptions can make it a lot easier to find documents 6 weeks or 6 months from now. Avoid common terms (searches will turn up too many “hits”) and try to use things that are specific and/or unusual to a document: client names, special terms or provisions, etc.

Sending Email from Worldox

Most people start from Outlook and click “attach” when they wish to attach a Worldox file to an email message. This opens Worldox and lets you pick the document(s) to attach. However, you can also send email starting from Worldox. This lets you select the documents before doing the cover note.

One very significant advantage to starting from Worldox is that if you attach a large number of files with long file names starting from Outlook, you may get an error message and Outlook will prevent you from attaching all the files you need. If you start from Worldox, this Outlook restriction is bypassed.

First select the file or files you wish to email. If you wish to send more than one, check the desired documents by clicking the box to the left of the document name. A green check mark will appear. Then click the mailbox on the button bar or right-click and select “email.”

If you have checked more than one item, a box appears to verify that you wish to send all checked files. Make the appropriate selection. Another box then appears asking how you wish to send the files.

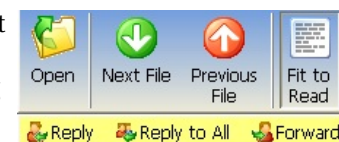
Full copy of the file means that the entire file is attached.

“In a WORLDQX file list” is for internal use only. It attaches a pointer to the file not the file itself. So when the recipient opens the “attachment,” they are opening the actual file in Worldox, not a copy that has been emailed.

Important: If you are sending an email internally, but the recipient is likely to access it via a smartphone, attach a full copy of the file, as the link will not be available from the smartphone.

Worldox lets you Zip multiple files to save space and send them as a single file (passworded if you wish).

You can also reply to or forward an email that has been saved in Worldox. When you open the email in the viewer, you see the following options:



You can open the email in outlook by clicking on the “Open” button. You can also Reply, Reply to All or Forward the email by clicking on the relevant tab. If you have difficulty (due to Outlook settings), open the email in Outlook and reply from there.

Managing Email Using Worldox

It is possible to manage your email from within Worldox. Simply click on the “Email” button to see all your Outlook email, including your folders.

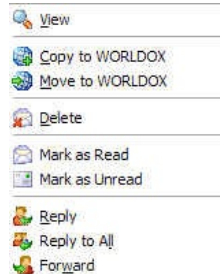
When the email list shows up, right-click on any item to get a menu of what you can do:

View lets you view the email.

Copy copies the email into Worldox, while leaving a copy in your email in box.

Move *deletes* the email from your email in box and puts it into Worldox.

When you copy or move an email to Worldox using this function, it is saved in a read-only format. Any attachments to the email are also saved with the email and will also be full-text indexed. If you wish to save an attachment separately, open the saved email from within Worldox. Right-click on the attachment at the bottom of the email and choose “Save As.” Profile and save the attachment.



Naming Emails

By default, the subject line of the email becomes the description in Worldox. However, with many exchanges of emails, the “Re:” line frequently comes to have little or no relation to the actual content of a given email. Therefore, it is a good practice to at least think about changing the subject line to something more useful and easier to search for (The original subject line will be preserved in the actual email as it is saved to Worldox).

Using Worldox to Archive Emails

Many senior attorneys may have 10,000 or even more completely unsorted emails in their in box to which they are very attached. One approach to resolving the problems that this causes is to mass archive old emails into Worldox.

For example, you could create an email “matter” for each user and “doc types” for 2008email, 2009email, etc. Then select and move all the emails for a given year to the respective doc type. This lets the attorney keep recent email in Outlook, but still make it much more efficient to find older email since the email will be searchable both by To/From and text in the email.

Quick Profile

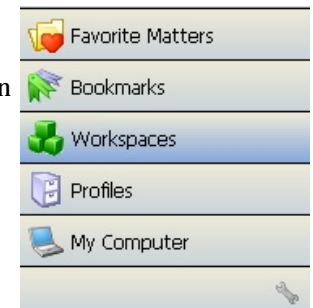
Worldox has a “Quick Profile” feature that allows you to save frequently used profile information. Thus, if your work centers on documents for just a few clients, you can save that profile information (e.g., Client No., Doc Type) to a “Quick Profile.”

To do this, enter the profile information (but don’t save the document), then click on the “Quick Profile Menu” button at the top right of the main Profile screen. Give the Quick Profile a name. When you want to re-use it, instead of having to fill in the information, simply double click on the quick profile listing in the “My Profiles” screen of right-hand window and the information will be entered. Right-Click on “My Profiles” to save it as a default.

You do not have to fill in every field in the profile screen; some information can be left blank (such as Doc Type or the Description). The Quick Profile will fill in partial information if that is what you wish to save.

Navigation Pane

What used to be termed the “Folder Tree” has been reorganized along the lines of the Navigation Pane in Outlook. When you open it, you will see options like this:



Favorite Matters

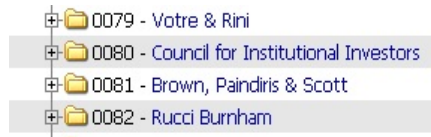
This “My Matters” feature brings together the last 20 matters you have worked on. You can remove ones from the list to streamline it if desired (they will come back on the list if you open them again).

Workspaces and Projects

You can subscribe to folder-based Bookmarks to make a Workspace but cannot use search-based Bookmarks as the basis for a Workspace. See p. 12 for more on Workspaces. Right-clicking on any Workspace lets you create a new Project. Many firms want to be able to group documents into a “project” over and above other selection criteria that Worldox offers. For example, it can be useful to group all the documents required for a real estate closing, all Exhibits for a trial, all documents needed for a filing, etc.

Once you have created the Project, select it and then drag and drop any files you wish to add to the Project. Double-clicking on the Project displays the contents. You can change the display and then export a “table of contents” for the Project to Excel by printing it to a *.CSV file. You may also want to create a “Projects” document type for ease of searching.

- Profiles lists your profiles and the entire tree under the profile. You can use this to navigate the actual document tree, although this will be significantly slower and more inefficient than well-designed searches. If you click on a given Profile and expand the view, Client and Matter names are displayed next to the numbers: The Tree View expands automatically when you are in it, and resizes smaller when you leave it.
- My computer is a “Windows Explorer on steroids.”



Taking Documents With You

There are two options for taking documents with you: Check Out and Send To. If you Check a document Out, then no one else can work on it (although they could make a copy and start a new document). This prevents the situation where two people make conflicting changes and there is no way to know who changed what.

If you simply want to take copies of documents with you (for example to court or to a client) but do not want to edit them, you can copy documents (or files for an entire matter) to your Mirror Drive, a CD or a USB key drive assuming that firm security standards allow this. If you do this, be aware that someone in the office could edit any of the documents you have. If you also edit the same document, there is no way to resolve any difference and “the last changes win” (the previous changes are wiped out).

Check-Out Check-In / Sending to...

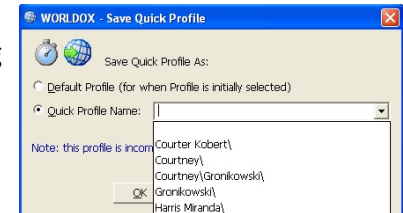
To put additional documents on your “Mirror Drive,” simply select the documents you want to take, right-click and select “Send To” then “Local Mirror.” When you open Worldox off-line, the documents will be available. When you plug your laptop back in to the network you will be prompted to reintegrate documents you have worked on to the main Worldox system.

- To simply “send” the file to a USB key (or to burn a CD), select the “send to” option. If a USB key is plugged in to your computer, its drive letter will appear first on the list (the drive letter will be different on different PCs).
- If you do not wish anybody else to be working on the document when you are, right click on the document you wish to send and select “Check-Out.” When you return to the office, you can “Check In” the document so that it is again available to everyone.

Quick Profiles: “Drag & Drop” to Worldox

When you send an email, you are prompted to create a Quick Profile. Quick Profiles contained pre-filled-in information about a document you are saving. For example, if you send a large number of emails regarding a particular matter, you may not want to have to fill in the client/matter information for every email. If you say K to the prompt, a screen appears asking for the name of the QuickProfile Simply type in the name.

If a given client has multiple matters, you can create sub-folders by including a backslash (\) in the name. If you are adding a new sub-folder, click the down arrow and select the main folder. You can then add a sub-folder to it.



When you opt to Copy or Move the next email to that particular recipient, you can pick the information from the QuickProfile list to the right of the Save screen if it is not already filled in.

Quick Profiles created when you save an email will normally show up as “Drag and Drop” folders that let you move emails to Worldox. First check to see that there is a “Worldox” folder in Outlook. When you click on it, the following screen appears.



Depending on how Worldox is configured you may see your Outlook inbox.

To add a quick profile manually, click the “Quick Profile” button. Then repeat the process described above for creating Quick Profiles. Once created, they will show up as a “folder” under Worldox in Outlook.

You can drag and drop one or more emails to the folder and they will automatically be profiled using the information already entered in the Quick Profile. Important: This MOVES the email to Worldox. You cannot copy email to Worldox with this option.

Note: Double clicking on any of the existing sub-folders, will do a “reverse” lookup and find all the emails stored in the directory the Quick Profile was set to. Depending on how Worldox is configured, this may mean all the files for a given Client/Matter. In other cases, you may only see all the emails.

General Considerations on Managing Email

Should you copy or move email to Worldox? In the abstract, it is more efficient to *move* email to Worldox (which deletes it from Outlook). The email will be better organized, easier to find and moving it relieves pressure on your Outlook/Exchange system. However, there are two issues to consider:

- Many attorneys get very nervous if they cannot access their email through Outlook (even if they have 10,000 unsorted emails and “access” is a relative term).
- More importantly, if attorneys are accustomed to accessing their Outlook inbox via Outlook Web Access or a smartphone, when emails are *moved* to Worldox, they will no longer be available via smartphone or OWA.

Therefore many firms prefer, at least initially, to have users copy emails. A related option is to Archive emails to Worldox (see p. 10).

Managing Email Using Outlook

By default, when you send an email, Worldox pops up (see screen below). However, you must manage your incoming and historical emails manually. This can be done either from Worldox or Outlook. In Outlook, use the “Copy to Worldox” or “Move to Worldox” buttons. If your Inbox is not sorted into folders, sorting your email by the “From” column may make it easier to move into Worldox. You can move emails in large batches as long as they are all moved to the same Client/Matter/Doc Type.

Profiling Email on Send

Worldox is set to automatically profile your email when you send it. After you send the email, a Worldox screen pops up asking if you wish to copy or move the email to Worldox, or ignore it. If you send multiple emails to the same person, you can create a Quick Profile so that you only need to fill it out once. You can also add the email recipient to an “automatically ignore” list (for example, for personal email that you know you will never want to store in Worldox). Rules (under Edit | Address Rules while in the Email screen) give you even more flexibility in automating this process.

Subject to the caveats listed above, it is better to “Move” emails to Worldox rather than “Copy” them. This keeps your Outlook system “cleaner” and Outlook will run with fewer glitches overall.



Relating Documents

If you are working on a project or have a number of documents that “belong” together – for example, exhibits or items that need to be filed together, you can relate them and keep them together as a group. This is separate from the “Projects” feature.

To relate documents, simply drag other (“Child”) documents on top of the main (“Parent”) document. Clicking on the “Related” button at the bottom of the screen shows the related documents. You can also create a “related” column which will display whether a document is a Parent or Child. Thus a listing of “P3” shows that the document is a Parent with 3 Child documents.

Using WorkZone

A feature called “WorkZone” enables you to “drag & drop” email messages, attachments, or (using Windows Explorer) any other file directly into Worldox. You can enable or disable the WorkZone by right-clicking on the Worldox icon in the system tray and selecting “Enable Workzone” or “Disable WorkZone” depending on whether it is running.



The WorkZone icon should appear at the top center of your screen.

When you drag a file and release it on the WorkZone icon, you are asked to choose a Profile and then the normal profile screen appears. Fill out the profile and the item is copied and saved to Worldox.

To the extent that multiple files will be assigned to the same client and document type, you can drag and drop them as a group.

Note that this *copies* the file to Worldox. It leaves the original file on your hard drive.

Scanning / PDFs

“Text searchable” PDFs are indexed by Worldox. Worldox does not provide any scanning or PDF conversion natively. However, if you are using Acrobat or some other PDF conversion software such as pdfDocs, Right-clicking on a document and selecting “Send to” will list available PDF conversion options. If you want to OCR a document using Acrobat, it is preferable to OCR the document prior to saving it to Worldox.