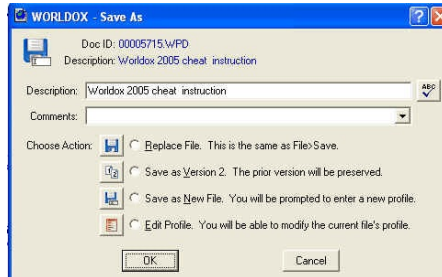


Version Control

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.

To see the various versions a document has been through, click the Ver List icon on the button bar.

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 Trail." You see the audit trail for that document.



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

Security

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

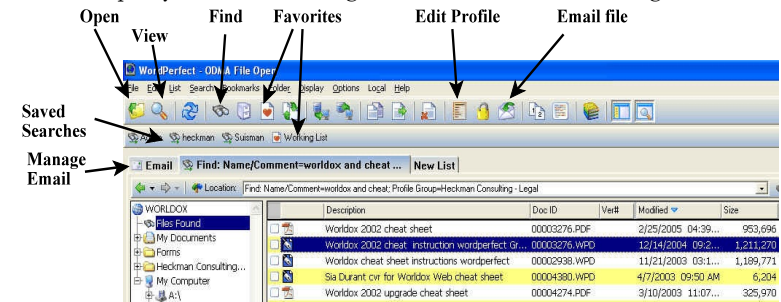
Click "Classify" to select security. Select "Hidden" or "Read Only" to hide the document from other users or make it Read Only. Select "Custom" to add specific users or groups of users.

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

Worldox GX Cheat Sheet

Basic Worldox Screen

Worldox comes up when you select File Open or File Save. When you select File Open you see something that looks like the following screen.



- By default, you see 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. Right-click the "Modified" column and select Show/Hide Grouping to change display.
- 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 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 open.
 - 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 over).
 - 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, you must open or view it first.
- The Form Bar at the bottom lets you display additional information:



- "Preview" shows you the top of the document in an Outlook-like preview pane (which can be sized larger or smaller).
- "Comments" or "Profile" lets you view those elements and edit them on the fly (the "Comments" attached to a document for example).
- "Full List" displays only documents.
- "Relations" and "Project" show documents included in those functions.

Searching for a Document

If you need to find a document that is not one of the last 20 you have worked on, click **Find** to launch the search screen. Click to launch a basic search or select “repeat last find.” You may also have quick search tabs saved below the button bar. Your screen may be slightly different than the following, but the search principles are the same.

There are three ways to enter information in this screen:

- If you know the desired information, type in it the appropriate box. Worldox supports “wild-cards,” so typing “prod*” will find “produced” and “production.”
- To get a list of available items to be searched for, click on the labeled button to the left of the text box (e.g., Doc Type).
- To get a list of recent searches, click on the down arrow to the right of the box ().

Quick Searches

If you already know the number (i.e., the Doc ID Number) of a document, click next to “Location” (or hit **F2**) and type the number.

Open With. Worldox now 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

- **AND.** To find the occurrence of two words in the same document, connect them with the word AND, e.g., January AND bill
- **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 ltr.”
- **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.
- 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.”

Moving Legacy Documents into Worldox

Pre-existing 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. To move the document, double click to open it. You will be asked to choose a profile (“Client Work”) and you will then see a profile screen with the old name of the document inserted as the “Extended Name.” You may change this as desired.

Fill in the required information (some may already be set as a default) and click to move the document.

Click “Yes” to open the moved document.

To move multiple documents at one time, select the documents you wish to move in the Worldox document list by clicking in the check box to the left of the document. 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). If you move multiple items, they will all contain the same profile information (except for the extended name).

Customizing Worldox

Worldox can be extensively customized. Settings that can be customized by the end users include:

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 on the left or right side of a column header to change the width.

The **Form bar** at the bottom of the screen lets you display additional information. Double-clicking on any item lets you edit it.

Relating Documents

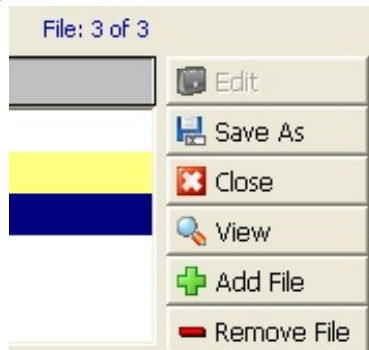
If you are working on a project or have a number of documents that “belong” together - for example, exhibits or items that need to be filed together, you can relate them and keep them together as a group.

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.

Projects

Many firms want to be able to group documents into a “project” over and above other characterization that Worldox offers. For example, it can be useful to group all the documents required for a real estate closing, all Exhibits to a brief, all documents needed for a filing, etc.

The “Project” function now lets you do that. To create a Project, simply click on the Project button. The Project screen opens up. You can simply drag files into the Project area or you can use the buttons at the right to add or remove files.



Click “Save As” and give the project a name. You might consider including the word “project” in the description so that projects can be searched for easily. You may also wish to create a document type of “Project” to make searching easier.

Projects appear with their own icon (a briefcase) and a document extension of *.wdl.



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 scanning software, Right-clicking on a document and selecting “Send to” will list available PDF conversion options.

Saving and Customizing Searches

With Worldox GX, 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. The most recent search appears by default.

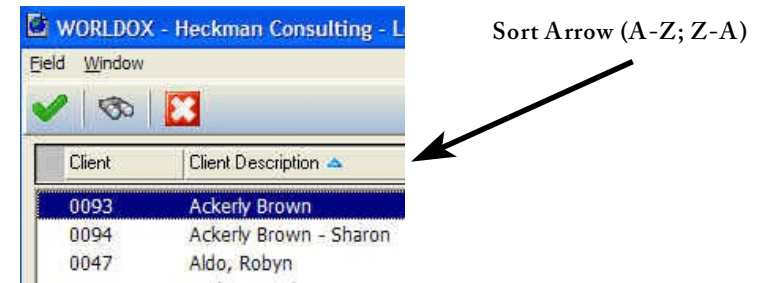
To permanently save a search and give it a name (for example your forms, or all the files for a particular client), first perform the search. Then right click the saved search bar (above the “Email” button) and click “add.” Give the search a meaningful name. It will appear as a button on the second row of buttons. You might wind up seeing something like this:



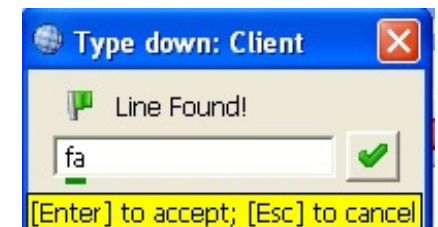
These searches are dynamic: if you add new documents that satisfy the search criteria, they will appear the next time you perform the search.

Sorting Search Screens

You can control the order in which items are sorted in any Worldox screen. At the right of each 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.



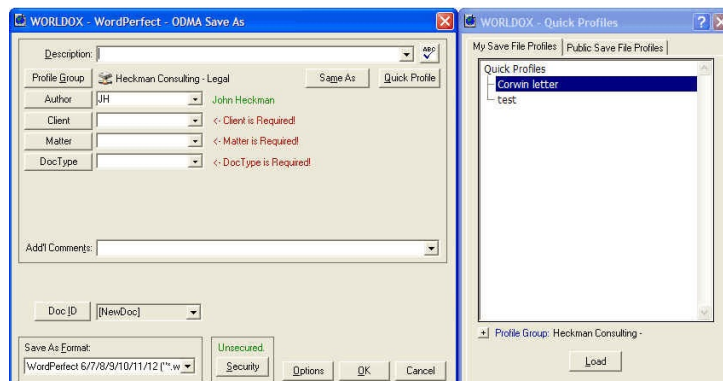
If the list is very long (such as a client list), you can search for, *e.g.*, the client, by starting to type the client name or the client number. You will see the following screen and the selection will proceed to the combination of letters you type :



Note that everything is searched regardless of the sort order. Type-down search also works on the document list screen.

Save / Save As

When you click on “Save,” the following screen appears. To save your document, simply fill in the fields as desired and click . 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. Note that anything you put in the “comments” field is also indexed with the profile.



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.

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 once, then click on the “Quick Profile” button at the top right of the main Profile screen. Give the Quick Profile a name. Then, 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 right-hand window and the information will be entered. If you frequently work on similar documents for certain clients, this can be a time-saver.

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.

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

Email has become the standard way of sending documents to other people. However, you may occasionally need to copy a document to a floppy or a USB key drive to send it to someone. There are two ways to do this:

- 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.
- To simply “send” the file to a floppy or to burn a CD, select “send to” and the appropriate option. This will not change the security on the file.
- With some additional customization, you can also add a “send to” function for a USB key drive. This can be useful if you want to take *all* of a client’s files with you to a meeting, for example.

Taking Documents With You on a Laptop

When you are working in Worldox, documents that you save are also saved to your local hard drive (the “Mirror Drive”) for 7 days. Thus if the network connection is lost or you use a laptop and take it home with you, you can continue working on these documents.

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. Documents taken on a laptop are reintegrated to the main Worldox system when you plug your laptop back in to the network.

Using WorkZone

There is also a feature called “WorkZone,” (formerly called “Drop-Zone”) 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.



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 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.

Profiling Email on Send

You can set Worldox 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.



As a general rule, it is better to “Move” emails to Worldox rather than “Copy” them. This keeps your Outlook system “cleaner” and overall, Outlook will run with fewer glitches.

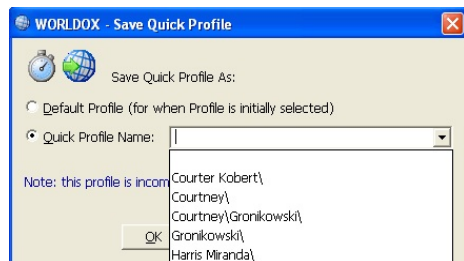
“Drag & Drop” to Worldox from Outlook

Assuming the feature has been turned on in your system, you can easily create “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 above screen appears.



To add a quick profile, click the “Quick Profile” button. Then select “New” and select the Profile group. Fill out the profile information (the description will automatically be taken from the Subject line of the email) and click . When asked to name the profile group, 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.

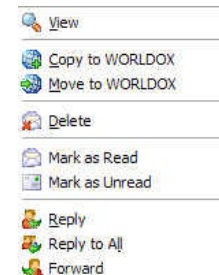


You can now drag and drop one or multiple emails to the folder and they will automatically be profiled using the information already entered in the Quick Profile. This MOVES the email to Worldox, rather than copying it.

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 into Worldox using this function, it is saved in a read-only format and cannot be edited. 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. You will also see the attachment. Right-click on the attachment and choose “Save As.” Profile the attachment. It will be saved and also automatically related to the email so that you can always see where it came from. You can also do this using the WorkZone, though the procedure is different.

Sending Email from Worldox

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

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.

Note that Worldox lets you Zip multiple files to save space and send them as a single file.

By default attachments use the description as the file name.

Click . Your email will open with the documents already attached to the message.

