

# Worldox Web/Mobile

## General:

In order to access Worldox via the Web, you must be registered as a Worldox Web user (this is independent of using Worldox at the office). You will also need a separate Worldox Web password.

To access Worldox Web, point your browser to: [http://www.\\_\\_\\_\\_\\_.com](http://www._____.com). Bookmark this location so you don't have to remember it. Note: you can also download the Worldox app from the Apple Store for use on the iPad.

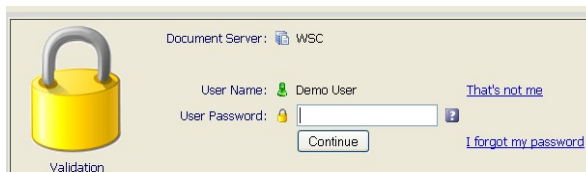
The screens and options in Worldox Web/Mobile mirror your personal Worldox settings in your office.

**Logging In.** There are two logins: the general one and your personal one. For the general one (below), the Document Server Name is "\_\_\_\_\_." You will be given the password separately.



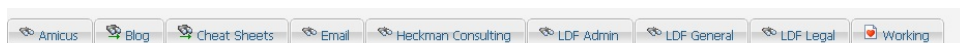
The image shows the "Sign In" screen for Worldox. It features a large green circular logo with a white 'W' on the left. To the right, there are three input fields: "Document Server:" with a folder icon, "Server Password:" with a lock icon and masked characters, and "User Code:" with a person icon. A "Continue" button is located at the bottom right.

Click "Connect" and a second screen will appear (below). Your User Code will probably be your initials (ALL CAPS). The password will be given to you separately. Click "Login" to proceed



The image shows the "Validation" screen. It features a yellow padlock icon on the left. To the right, it displays "Document Server: WSC". Below that, there are fields for "User Name:" (containing "Demo User") and "User Password:" (masked). There are links for "That's not me" and "I forgot my password". A "Continue" button is at the bottom.

The initial screen reflects the Worldox screen in your office. Any Quick Search Bookmarks you have will be displayed.

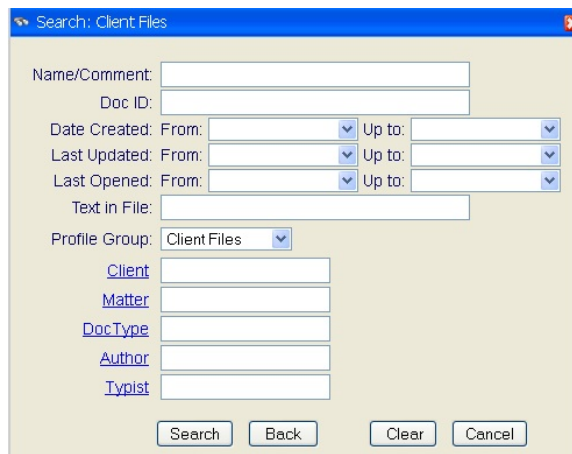


Below the Worldox logo, you will have buttons for "Search" (which brings up your various defined searches), "Direct Access,"



"Favorite Files" (i.e., most recently used) and "Upload New File." Click on the desired option.

If your Bookmarks are not sufficient, you may wish to search for "client files." The search screen will reflect your normal Worldox search screen and may look something like this:



The image shows the "Search: Client Files" window. It has a blue title bar. The main area contains several search criteria: "Name/Comment:" (text input), "Doc ID:" (text input), "Date Created:" (From and Up to date pickers), "Last Updated:" (From and Up to date pickers), "Last Opened:" (From and Up to date pickers), "Text in File:" (text input), and "Profile Group:" (a dropdown menu currently set to "Client Files"). Below these are five labels with corresponding text input fields: "Client", "Matter", "DocType", "Author", and "Typist". At the bottom are four buttons: "Search", "Back", "Clear", and "Cancel".

If you wish to search a different profile group, simply click the down arrow to the right of "Profile Group" and select it. Otherwise, just fill out the profile exactly the way you would if you were in the office. If you need to look up Client/Matter or other information, click the relevant label.

When your search is complete, you see the search results. The button bar above the list gives you several options:



1. By clicking on the magnifying glass, you can view the document in HTML format. The formatting may not be identical to the actual document, but you will be able to see the content.

2. By clicking on the green check mark, you can check out the document in order to work on it at home, or wherever your remote location is. Alternatively, click on the left-most icon (with the red down arrow) to download the document. You may then edit the document on your remote PC. You *must* download or check out the document to work on it. You cannot work on-line.

3. If a document is already checked out, it will have a green or red check mark next to it. Green means that you are the one who checked it out and you can check it back in. Red means that someone else has the document checked out and you cannot check it back in. Click on the file folder icon to check the document back in. You will have an option to check the document back in as a new version.

4. If you have created a brand-new document outside of Worldox, click “Upload a New Document.” You will be asked to fill in a profile (with the same fields as your normal Worldox profile), browse to the location of the document, and it will be uploaded.

