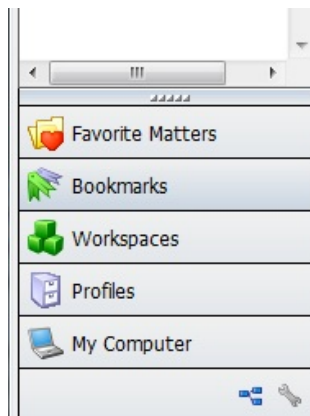
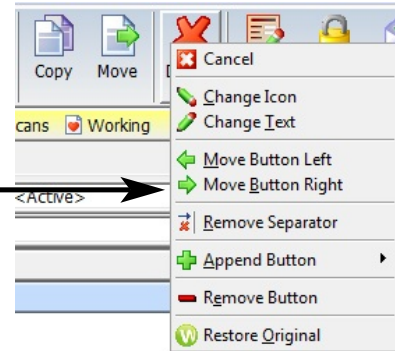



# What's New in Worldox GX3

As with any new version of a program there are two sorts of changes: background features that can be very important but that the end user does not immediately see, and other changes, frequently cosmetic, that can be very important to the end user.

## End User Changes

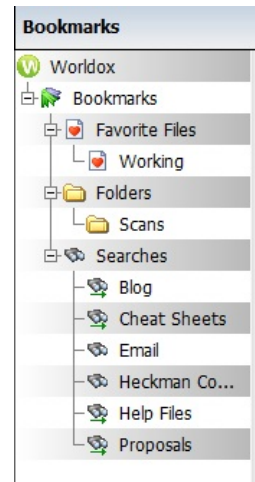
Worldox GX3 has a number of changes that are obvious to the end user. The toolbar can now be customized to get rid of the clutter of buttons you never use.



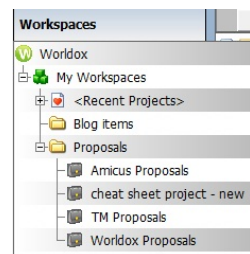
The main change, however, is the addition of an Outlook-style Navigation Pane to the left of the file list. This contains buttons for Favorite Matters (a new addition that extends the "Favorites" tab on search screens), Bookmarks, Workspaces, Profiles and My Computer. If you have the Productivity Suite, there will also be a "Workflow" item (  ).

The Favorite Matters tab lists the matters you have consulted recently so they can readily be consulted without defining a search. It can grow to be a bit unwieldy, but you can easily remove matters you are no longer actively involved with. This, like other elements on the Navigation Pane, is a directory search, so the functionality of full boolean searching is not available here.

The Bookmarks button lets you display more bookmarks than generally fit on the bookmark bar, so that the dichotomy between the bookmark bar and the bookmark menu item is removed.



The Profile button lists client/matters available under the various profiles your firm has, while My Computer lists a standard, internet explorer type directory tree.



Lastly, if the firm makes significant use of Projects, they are now very much easier to organize and access than previously. This works best if you set up a separate "Project" profile group, because My Workspace, like other items, is directory based on search-based.

The tabs that are displayed here are customizable, so that some can be removed and the order can be changed. Lastly, all these items can be set to expand when you hover the mouse over them so that you do not take up valuable screen real estate except when you need to.

## Categories

The old " Libraries" feature has been replaced by a " Categories" feature. This is a meta-data tag that lets you tag a given file with multiple additional categories, above and beyond document types, etc. This can help firms that want to associate a given file with more than one thing. You can create firm-wide or personal as well as folder-based categories. You can sort a column by category, but at present you cannot search by category.

Some examples might be: in a litigation there are two defendants. You want to tag files as belonging to defendant1 or defendant2. Similarly, suppose you have a document type of " training" but you do training for a variety of programs. You could tag materials with the relevant program to make it easier to sort them. Or, you could use categories for status of documents (signed, urgent, etc.).

To create a category, right-click in the category column on the file (or files) selected and click on Add/Edit Category. There are more than 200 icons available to be associated with a category. Since if a file is linked to multiple categories only the icons may display in the column, this choice can be important.

## Structural Changes

There is a newer version of indexing program (ISYS). Especially for firms with large databases, this will result in much faster builds of the indexes. In addition, the viewers are much better: I had documents that the old viewer did not display correctly at all but the new viewers saw with no problems. For some firms, this will be sufficient reason to upgrade rather sooner than later. If a firm is using Web/Mobile, that will have to be patched as well in order to access the new databases.

## Legal Hold

If a firm needs Legal Hold capabilities, it usually needs them badly. A " Legal Hold" is the process a firm uses to preserve all forms of relevant information when litigation is reasonably anticipated. While this will include much more than just documents on your server (backup tapes, for example), Worldox now has the ability to mark documents and emails stored in Worldox for " Legal Hold." This places them in a reserved area where they can be viewed, but not edited or changed in any way. By identifying relevant documents and marking them for " Legal Hold," a firm should satisfy a major portion of legal hold requirements (just as a document management system such as Worldox gives a firm a step up in terms of Electronic Discovery).

At present there is only one Legal Hold. However, by creating categories (Legal Hold 1, Legal Hold 2), you can differentiate among different Holds.