

What's New in Worldox GX

The following is not intended as an exhaustive list, but rather to enable you to take advantage of some of the most useful features immediately.

Pretty Pictures. The first thing you will notice is that virtually all the icons and screens have changed in order to have a more “Windows XP” look. These may take a little getting used to, but there is no functional change here. Note that the red/blue sort triangles on columns are gone, replaced by a single blue/green triangle on the column being sorted that points in the direction of the sort.

Form Bar. There is now a preview bar at the bottom of the Worldox screen which lets you switch between various functions. Note that the bar tells you what profile the selected document is assigned to (at the right: Heckman Consulting Legal).



Full List: Displays the entire list. This is the same as the default for previous versions.

Comments: Opens up the comments for the document the cursor is on and lets you add a comment on the fly without going through “Edit Profile.”

Preview: This opens up an Outlook-like “third pane” that lets you preview the document. Note that if there is a lot of white space or electronic letterhead at the top of the document you may have to scroll down.

Relations: Shows related documents.

Email Saving: When you send an email, a screen pops up asking what you want to do. If it is business-related, you can copy or move it to Worldox. If it is personal, you can set Worldox to ignore that address in the future.

When you save an email to Worldox, it remembers the profile and will use the same profile by default for future emails to the same address.



Open With: Previously, if you were using Word and wanted to open a PDF or Excel file (for example), you had to right-click and select “Open With.” Now, if you double-click to open, a dialog pop up asking if you want to open the file in its native application (in this example PDF or Excel). Select that option and the file opens using Acrobat, Excel, etc.

Taking Files Home on a Laptop: The simplest way to take files home on a laptop is to select the desired files, right-click, select Send To | Local Mirror. This puts the selected files on your hard drive so that you can work on them.



Quick Find. The old Ctrl-Q keystroke for entering the document number is gone. Instead, just type the document number in the “Location” line (2nd line from the bottom above the document listing)..

Enabling Drop Zone. DropZone used to be somewhat intrusive. Now, you can enable and disable it at will. Right-click on the Worldox icon in your system tray. Select “Enable DropZone.” The same process in reverse will disable it.

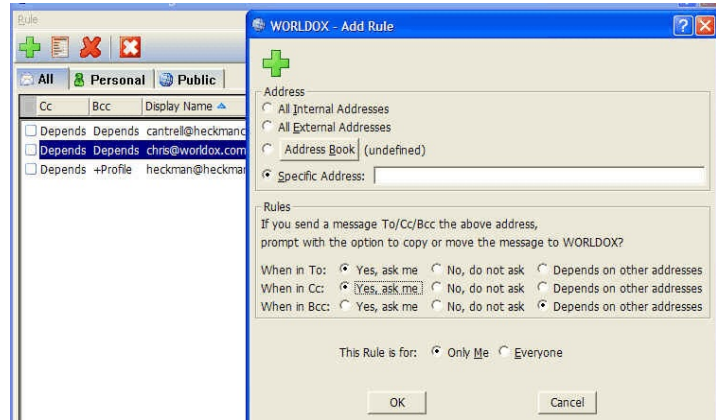
Creating Rules for Handling Emails

When you select the Email tab, then Edit | Address Rules, you see the following screen:

The main two options for various addresses are:

Yes, ask me. This disables the “Ignore” option when the save to Worldox screen comes up.

No, do not ask. This is the same as setting an “Ignore” status for the user: you will not be asked to save any of their emails in the future. Use this for personal email.



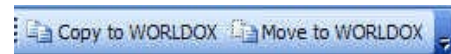
You can also create mass settings for Internal (company) addresses, or link settings to your Outlook address book.

Dragging and Dropping Emails From Outlook to Worldox

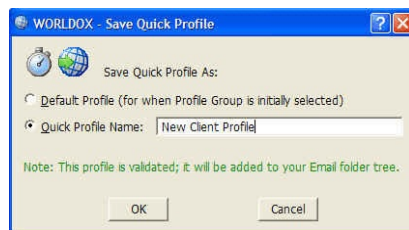
With proper setup, you can now drag and drop Outlook emails to a client sub-folder under a “Worldox” folder in Outlook and have them moved directly to Worldox. This must be set up on a client-by-client basis, it is not automatic.

To verify that this has been set up correctly, open your Inbox sub-folders in Outlook and verify that there is a “Worldox” folder.

Select an email for the client you wish to profile, and click on the “Copy to Worldox” button in your Outlook toolbar:



The Worldox profile screen will appear. You *must* fill out *all* the fields for the profile you wish to create. The “Description” will automatically be filled in with the Subject line of the email. Then click the “Quick Profile” button at the right of the Profile window.



Fill in the name of the Outlook folder you wish to create. You might use the client/matter number or name. If you include a backslash (“\”) in the name, it will create a sub-folder. Thus “Heckman misc” will create a folder with that name. “Heckman misc\Worldox” will create a Worldox sub-folder under “Heckman misc.” You will wind up with a folder for every profile variation you create.

That’s it. You can now drag and drop directly to Worldox.