

What's New in Worldox GX4

Worldox GX4 is a major release, which features both a major interface update and a host of new features. Many menu options are now context-sensitive so there are ease of use improvements throughout the program.

By default, GX4 offers a “Windows 7” look and feel, although users can choose to retain the GX3 look or move to a flatter, tile-based Windows 8 look. In addition to the classic list display, GX4 offers a “tile” view.

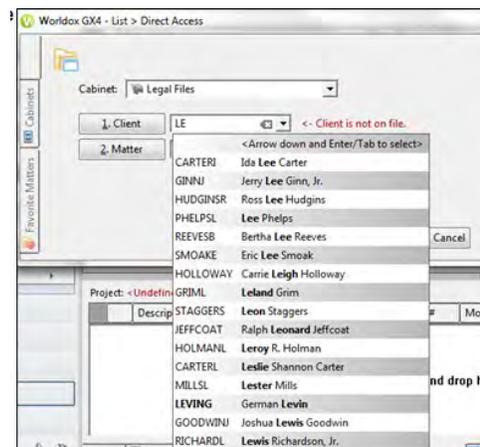
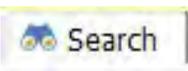
While the tile view is “cleaner,” it offers less information and is less customizable than the classic list display. Heavy duty users may want to stick with the classic view. It is easy to toggle back and forth as desired.



Saving and Searching

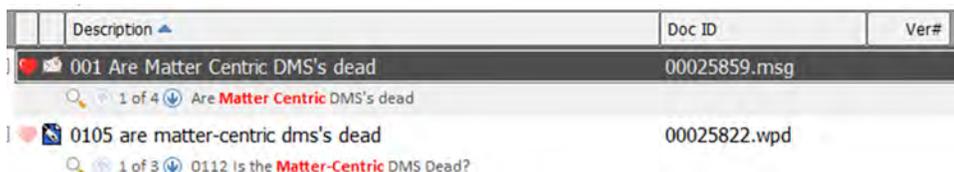
When you save or search for a document, you can now type either the DocID or any aspect of the client/matter/doctype description in the respective field. The list of options for what you have typed pops up and you can select what you want. This represents a major ease of use improvement.

If you hit the new Search icon, a combined description/text search pops up:

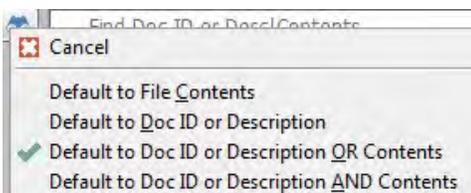


Click here to search for DocID or words in file description and/or content

Any search hits are displayed in “snippets” beneath the main listing in the list display à la Google. The number of hits are listed and you can display them by clicking on the down arrow (1 of 3 here). You can also easily access them by opening the Viewer Pane at the right of the display. As with the main viewer, text hits are immediately displayed in the Viewer Pane.



You can also customize how this defined by clicking on the search icon:



search is

Hide View
View: What's New in Worldox GX4

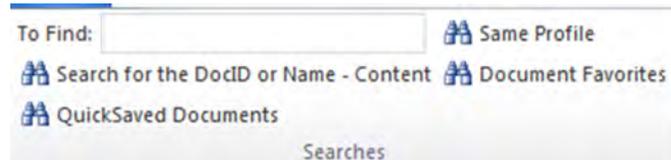
QuickSave

Worldox now has an “effortless” QuickSave button which is automatically added to the Quick Access Toolbar in Word (a small Green Square). When implemented, this saves documents in a single click to a specified QuickProfile with no other profiling required. However, this feature may cause issues with the retrievability of documents by people other than the user and should be implemented with caution.

Searching from Within Word

You can now search directly from the Worldox Ribbon within Word.

- Type the search parameters in “To Find” and then click “Search for the DocID or Name - Content.”
- Simply click “Document Favorites” to see the Word documents you have used in the past 30 days (maximum of 20).
- If the document has already been saved, click “Same Profile” to find documents with completely identical Profile information as the one you are working on (*i.e.*, including author).
- If you used the “QuickSave” feature, click that icon for all your QuickSaved docs.



Workflow Changes

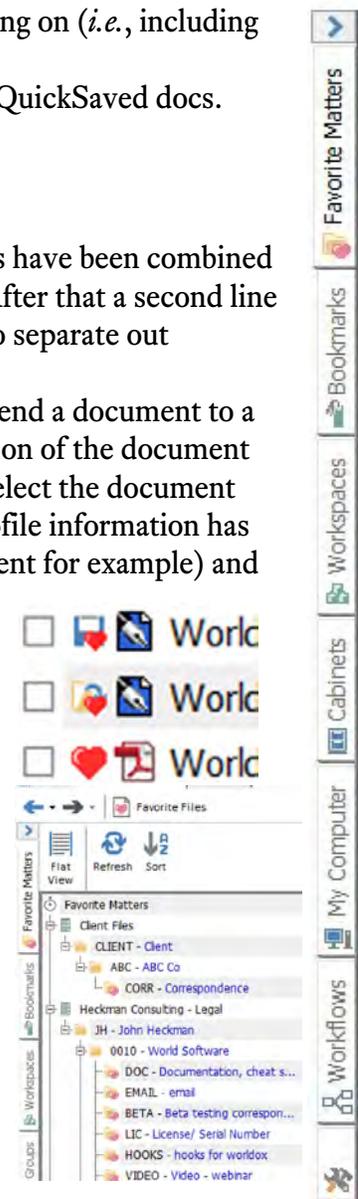
There are several significant workflow changes.

- When you save a document, the description and comments fields have been combined into a single field. By default, the first line contains 128 characters. After that a second line (previously “comments”) starts. If you wish to force a second line to separate out comments, simply hit Enter to start a new line.
- The workflow for Same Profile As has been simplified. Say you send a document to a client who returns it with comments. You want to save this as a version of the document you sent out. Open the document and select “Save as a Version.” Select the document which the new incoming document will be a version of. Once the profile information has been filled out, you can change it as needed (by adding a new comment for example) and save it as a version. Much simpler.

Favorite Matters

Favorite Matters have been dramatically expanded in GX4. Favorite Matters are now created/updated any time you save or open a file. They now appear as tabs to the left of various screens. Files that are part of your “favorite matters” list are indicated by a heart to the left of the file description. The different style hearts indicate how files were assigned to favorite matters. A plain heart means added manually, a little file folder indicates the document was opened, an old-style floppy disk indicates the document was saved. Because the favorite matters can get rather large, you can add or remove a file from your list by clicking on the heart icon. Favorite Matters include everything worked on for the past 30 days (max of 20 for each file type).

You can also sort how your favorite matters appear: by client



number; alphabetically by client name; or in the order in which they were created (most recent first).

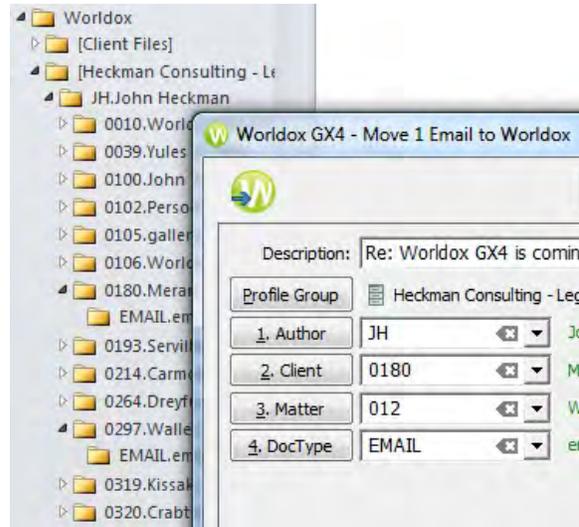
If you hover over “Favorite Matters” the tab expands. Select a given matter to fill in information for File Save screen. Favorite Matters are directory based, so only fields that are directories will be filled in.

Favorite Matters in Outlook

Favorite Matters now follow you into Outlook. In GX3, you had to create Quick Profiles to automate saving files. Now, your Favorite Matters appear automatically in Outlook by Cabinet, Client, etc. (however your Cabinets are structured).

To copy or move a file into Worldox, open up the Favorite Matter (Client/Matter/Doc Type) and drag the file or files to it. A screen will pop up asking if you wish to make any changes. Simply click OK if you just need to accept the defaults. If you change your mind or make a mistake, emails will be deposited into the “manually profile” area.

By default, emails are moved to Worldox. To copy an email, hold down Ctrl while dragging it to the desired matter



Heuristic Profiling within Outlook

You can now display suggested profiling within your Inbox listing in Outlook. This is set up by using the Field Chooser in Outlook to create three new fields:

Worldox Folders, Worldox Fields, and Worldox Cabinet. You can display one or all of these in your inbox list display. Once these fields are updated, you will see suggested Profile information for certain emails (depending on whether you have already sent or received email from that person). These must be updated manually. Like Favorite Matters, the list only goes back 60 days and may not display suggestions for all emails, but can be extremely useful.

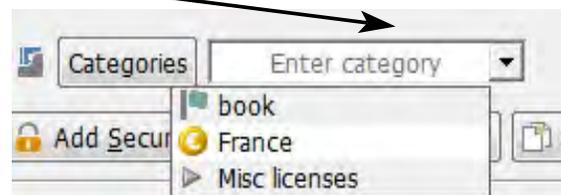
Subject	Received	Size	Worldox Fold...	Worldox...
RE: Scanner settings - one-sided ...	Tue 2/10/2015 4:45...	39 KB	JH.0327.EMA... 012. (W...	
RE: Scanner settings - one-sided ...	Tue 2/10/2015 4:44...	38 KB	JH.0327.EMA... 012. (W...	
RE: Regnante Canon copiers	Tue 2/10/2015 4:00...	31 KB	JH.0327.EMA... 012. (W...	
Compare	Tue 2/10/2015 3:51...	17 KB	JH.0327.EMA... 012. (W...	
GoToMeeting Session	Tue 2/10/2015 10:2...	13 KB	JH.0327.EMA... 012. (W...	
Re: iPad now functioning - Just i...	Mon 2/9/2015 11:2...	13 KB	JH.0327.EMA... 012. (W...	
Re: [Request ID :##125903##] : S...	Tue 2/10/2015 4:29...	79 KB	JH.0327.DOC... 012. (W...	
Pricing for Symphony Suite	Mon 2/9/2015 5:40 ...	14 KB	JH.0298.EMA... 012. (W...	

For emails that information is displayed, when you click the Copy to Worldox or Move to Worldox buttons, the profile information is already filled in.

Categories

Categories have been substantially beefed up. Categories appear as a field choice when you save a document. As with other options, there are a number of ways to enter information.

- You can simply type in the name of the category if you know it.



- Click on the down arrow to see a list of recent categories (above).
- Click the “Categories” button to see the list of available categories or to add a new one.
- Categories are now indexed with the rest of the profile information, so if you create a new category, it is searchable immediately.

Miscellaneous Nifty Things

- It is now extremely easy to save a set of columns and the overall display as a default simply by clicking the “save as default” heart. You can have “defaults” for search results, favorite matters or directories. Version lists and the Salvage Bin can also have default settings.
- You can also set default information in the profile save screen by clicking on the “save as default” heart. Basically, any time you see a heart symbol, you can save that option as a default.
- You can optimize the entire column display at any time by clicking on the orange grid icon at the top right of the display screen.
- To sort on a new column, hover over the column header. The cursor will change to an upward-pointing or downward-pointing arrow depending on whether you are toward the top or bottom of the header row. Simply click to sort in that direction.
- To change any search, click on the icon (e.g. Favorites) next to the search at the top. You will be given options to change the search.
- On occasion Worldox has falsely told users that a given email has already been stored in Worldox. The algorithm for determining this has been improved. Even better, users can now set an option on the “you can’t do this” screen that changes the default and lets users save duplicate emails.

