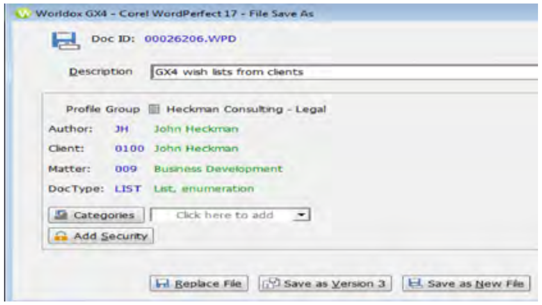
Version Control

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:



Worldox GX4 - Corel WordPerfect 17 - File Save As

Doc ID: 00026206.WPD

Description: GX4 wish lists from clients

Profile Group: Heckman Consulting - Legal

Author: JH John Heckman

Client: 0100 John Heckman

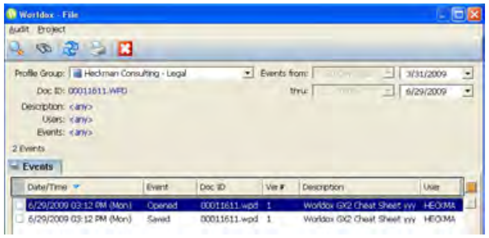
Matter: 009 Business Development

DocType: LIST List, enumeration

Select the desired option and proceed depending on the option selected. It is desirable to change the description somewhat so you can distinguish versions. As a matter of good practice, save a version only when significant changes warrant it. To see the various versions of a document, click the Ver List icon on the button bar or right-click the document and select "Versions."

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 | File." You see the audit trail for the latest version of that document. This enables a user to track the exact history of the document they are concerned with. Once you see the entries returned by the audit query, you can use "Project | Create" to create a project of those files.



Worldox - File

Profile Group: Heckman Consulting - Legal

Events from: 3/31/2009 thru: 6/29/2009

Doc ID: 00011611.WPD

Description: <any>

Users: <any>

Events: <any>

2 Events

Events

Date/Time	Event	Doc ID	Ver #	Description	User
6/29/2009 03:12 PM (Mon)	Opened	00011611.wpd	1	Worldox GX2 Cheat Sheet yyy	HECKMA
6/29/2009 03:12 PM (Mon)	Saved	00011611.wpd	1	Worldox GX2 Cheat Sheet yyy	HECKMA

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.

©Heckman Consulting

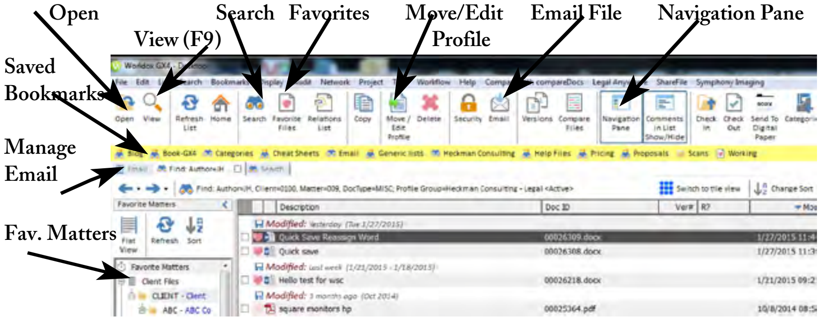
rev September 2016

Searching 2
Saving Docs 4
Navigation Pane . 6
Legacy Docs 7
Check-Out/In . . 8
Email Issues 10-13
Customizing . . . 14
Versions 16

Worldox GX4 Cheat Sheet

Basic Worldox Screen

Worldox pops up when you select File Open or File Save. When you open Worldox (File Open, or from the Work-Zone or System Tray) you see the classic Worldox screen.



- By default, you start with your last 30 days of documents (with a max of 20 per file type), 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. Click the "Change Sort" icon for other options.
- Important functions are on the Navigation Pane at the left. In particular:
  - Favorite Matters lets you do an instant search for matters you have worked on in the last 30 days.
  - Favorite Files lets you see all of a given type of file you have worked on in the last 30 days (all your Word documents for example).

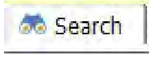
The View icon (the magnifying glass) launches a viewer so that you can see the document the cursor is on without opening it. Alternatively, the "View" tab at the right of the display window opens an Outlook-style Reading Pane.

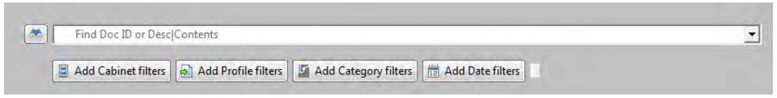
Important: The Viewer is one of the biggest productivity enhancers in Worldox. You can copy text from the View window and paste it into a regular document. You can scroll through the document list and each document will be "viewed" in turn, so that you do not have to open a document to see what is in it. You can print a document from the Viewer.

- Click the Copy, Delete, or Move/Edit Profile icons for those functions (for example to copy an older document as the basis for a new one).
- Search (the binoculars) opens search options if the document you want is not on the list, or click on a desired Bookmark. The other search icons let you do a combined text/description search (see p. 2).
- Email the document your cursor is on by clicking on that icon.
- Favorites lists the documents you personally have worked on recently. They are indicated by a red heart in the list and are created automatically when you open or save a document.

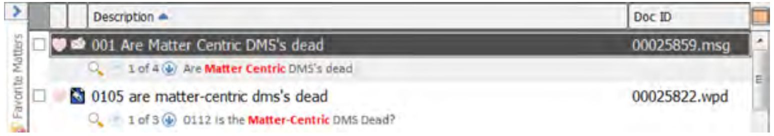
Searching for a Document

There are several ways to find documents in Worldox. The simplest is the combined text/description/comments search. Simply click on the search icon (above right) and the entry screen pops up:




Find Doc ID or Desc|Contents
Add Cabinet filters
Add Profile filters
Add Category filters
Add Date filters

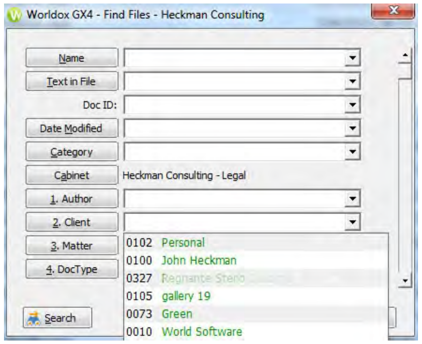
Type your search text. Results will display including "snippets" showing the text contained in any document found. A small button will indicate the number of "hits" which can be displayed one after the other. Click the "View" tab at the right to open the Viewing Pane.


Favorite Matters

Description	Doc ID
001 Are Matter Centric DMS's dead	00025859.msg
1 of 4 Are Matter Centric DMS's dead	
0105 are matter-centric dms's dead	00025822.wpd
1 of 3 0112 is the Matter-Centric DMS Dead?	

You can also add various delimiters, such as specific Profile, Category or Date specifics, to the basic search on this screen.

If you want to do a more focused search, click on a Bookmark or the Search icon to launch the search screen. If necessary, click OK to launch a basic search or select "Modify last Active Search." Your screen will be slightly different than this one, but the search principles are the same.


Worldox GX4 - Find Files - Heckman Consulting
Name
Text in File
Doc ID:
Date Modified
Category
Cabinet
1. Author
2. Client
3. Matter
4. DocType
Search

Cabinet: Heckman Consulting - Legal

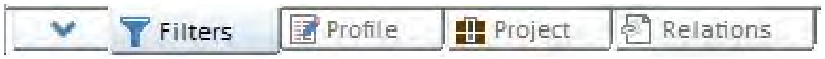
0102 Personal
0100 John Heckman
0327 Regnante Sterio
0105 gallery 19
0073 Green
0010 World Software

There are several ways to enter information here:

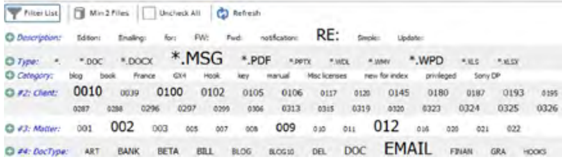
- Dropdown searches now work in find templates for Client, Matter or DocType fields. Simply start typing the name of a client, you no no longer need to know the actual client number (see p. 4).
- Click the down arrow to the right of any field (▾) to show your most recently accessed items.
- If you know the desired information, type in it the appropriate Name/ Comment or Text in File box. Worldox automatically searches for word endings, so typing "prod*" will find "produce" *and* "production."
- To get a full list of available Client/Matters/Doc Type items to be searched for, click on the labeled button to the left of the text box.
- The Client/Matter/Doc Type fields will auto-fill as soon as they are unique. Thus typing "plea" may automatically fill in "Pleading."

Note: For Boolean search options, see p. 15; for Outlook, see p. 12.

The Form Bar at the bottom lets you display additional information: Note: when one tab is selected, the others are greyed out.


Filters
Profile
Project
Relations

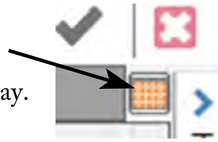
- The Down Arrow displays the full list of documents.
- "Filters" displays the information about the files in the list. The larger the type the more items there are in each category. This is very useful if you want to narrow down the search. Click next to "*.docx" to see only Word files; click on a doc type to see only that doc type, a specific matter to see just that matter, etc. Click "Uncheck All" at the top to reset.


Filter List
Min 2 Files
Uncheck All
Refresh
Description:
RE:
Type:
*.DOC
*.DOCX
*.MSG
*.PDF
*.WPD
*.XLS
*.XLSX
Category:
blog
book
France
GX4
Hook
key
manual
Misc licenses
new for index
privileged
Sony DP
#2: Client:
0010
0039
0100
0102
0105
0106
0117
0120
0145
0180
0187
0193
0324
0325
0326
#3: Matter:
001
002
003
005
007
008
009
010
011
012
016
020
021
022
#4: DocType:
ART
BANK
BETA
BILL
BLOG
BLOG10
DEL
DOC
EMAIL
FINAN
GRA
HOOKS

- "Relations" and "Project" show documents included in those functions.

Adjusting Columns

You can adjust the column display to "Best Fit" simply by clicking the orange waffle icon at the top right of the display.



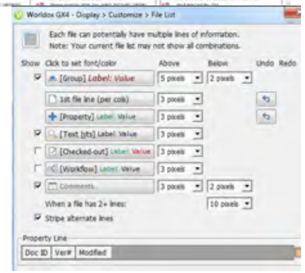
Boolean Searches

Boolean searches work for both text and Profile information. Both operators listed below work for GX4.

- Worldox automatically searches word endings. If you enter "plan" the search will return "planned," "planning," "planner," and so on.
- AND or &. To find the occurrence of two words in the same document, connect them with the word "and" or the & sign, *e.g.*, January & bill.
- OR or |. To find occurrences of either word in the same document, connect them with "OR" or the | symbol, *e.g.*, January | bill. Note: you can also do "and" or "or" searches in, *e.g.*, the Doc Type screen: "bill OR letter." You can select multiple Doc Types: they will be an "OR" search.
- NOT or ! . To find occurrences of one word but not the second in a document, connect them with "NOT" or the ! sign, *e.g.*, January ! bill. Or in the Doc Type screen: "NOT email."
- 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."
- Enclose phrases in quotes for an exact match. Exact matches can also be linked by Boolean operators: "not jurisdictional" *and* "failure to state."

Customizing Worldox

Users can customize Worldox extensively. The first option available is the choice between the default list view and the tile view. In miniature, the two options look like this:

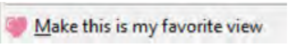

Worldox GX4 - Display > Customize > File List
Show
Click to set font/color
Above
Below
Undo
Redo
☑ [Group] Label: Value
5 pixels
2 pixels
1st file line (per cols)
3 pixels
[Property] Label: Value
3 pixels
☑ [Text hits] Label: Value
3 pixels
☐ [Checked-out] Label: Value
3 pixels
☐ [Workflow] Label: Value
3 pixels
☑ Comments
3 pixels
2 pixels
When a file has 2+ lines:
10 pixels
☑ Stripe alternate lines
Property Line
Doc ID
Ver#
Modified

Each file can potentially have multiple lines of information.
Note: Your current file list may not show all combinations.

Overall customization, including the display of "snippets" after a full-text search is governed by the "Customize" dialog (right).

The tile view shows less information and is less customizable than the list view, although it is currently more fashionable. Heavy duty users will have more options with the list view.

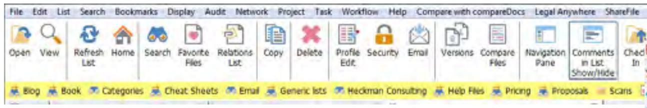
Order of column display. To remove a column from the list view display, "grab" it using the mouse and drag it off the bar. To add a column, click on any empty space between column headers and select which column to add. Click and Drag the right side of a column header to change the width. You can also drag the entire column to the left. To save the columns, right-click and select "Save Column Template." Give it the desired name. You can save this setting as a default by clicking the "Make this my favorite view" icon under "Customize":

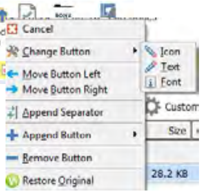

Make this is my favorite view

You can have separate "favorite views" for search results, favorite files and directory listings. You can also associate a column format with a given Bookmark in the bookmark bar (for example to show email fields).

Customizing the Toolbar

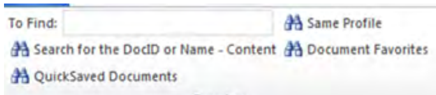
The icons and text of the toolbar can also be customized:


File
Edit
List
Search
Bookmarks
Display
Audit
Network
Project
Task
Workflow
Help
Compare with compareDocs
Legal Anywhere
ShareFile
Open
View
Refresh List
Home
Search
Favorite Files
Relations List
Copy
Delete
Profile Edit
Security
Email
Versions
Compare Files
Navigation Pane
Comments in List Show/Hide
Check In
Blog
Book
Categories
Cheat Sheets
Email
Generic lists
Heckman Consulting
Help Files
Pricing
Proposals
Scans


Cancel
Change Button
Icon
Text
Font
Move Button Left
Move Button Right
Append Separator
Append Button
Remove Button
Restore Original
Custom
Size
28.2 KB

Right click on any icon and you will see this menu: You can change the icon, the text, or rearrange buttons as desired. You can also edit the entire toolbar by right-clicking in the blank space at the right.

Searching from Within Word


To Find:
Same Profile
Search for the DocID or Name - Content
Document Favorites
QuickSaved Documents
Searches

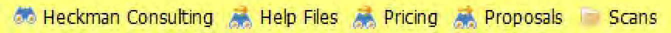
You can now search directly from the Worldox Ribbon within Word.

- 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 last 30 days.
- If the document has already been saved, click "Same Profile" to find documents with identical Profile information as the one you are working on.
- If you used the "QuickSave" feature, click on that icon to see all your QuickSaved documents.

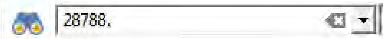
Bookmarking Searches

Recent searches appear next to the Search icon. You can select from your most recent searches by clicking the down arrow at the right of this screen. When you first open Worldox, you see your last 30 days work (max of 20 documents per format). Thereafter, the most recent search appears.

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 select Bookmark | Add this list from the menu. Give the search a meaningful name and pin it to the Bookmark Bar. It will appear on the second row of buttons. You will see something like this:


Heckman Consulting
Help Files
Pricing
Proposals
Scans

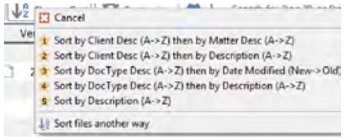
Searches are dynamic: if you add new documents that satisfy the search criteria, they appear the next time you do the search. If you Bookmark a search for Client "Jones," you can delete it when you finish working with that client.



Click the Search icon and type the DocID number followed by a period (".") to find just that document. You do not need an extension (*e.g.*, *.docx).

Sorting Search Screens

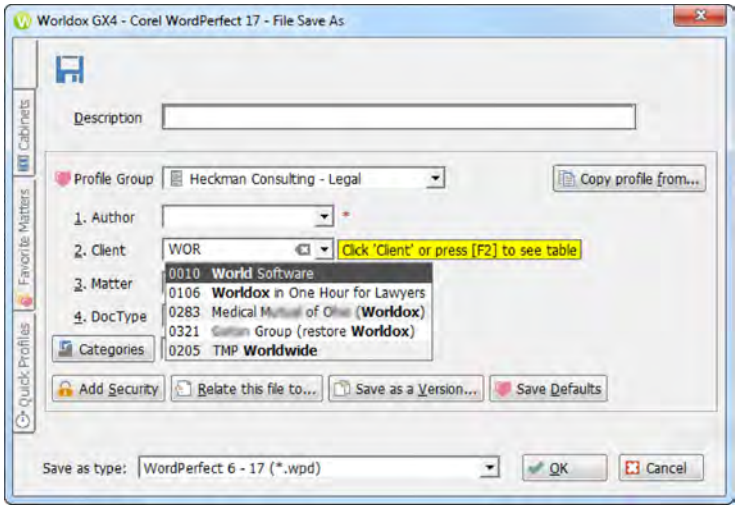
At the right of the column that is sorted, there is a blue-green arrow. If the arrow points up, the sort is A-Z (or old to new on dates), if it points down the sort is Z-A. To change the sort order, simply click in the sorted column. To select other search options, click the "Change Sort" button:


Cancel
1 Sort by Client Desc (A->Z) then by Matter Desc (A->Z)
2 Sort by Client Desc (A->Z) then by Description (A->Z)
3 Sort by DocType Desc (A->Z) then by Date Modified (New->Old)
4 Sort by DocType Desc (A->Z) then by Description (A->Z)
5 Sort by Description (A->Z)
Sort files another way

Note also that in some lookups there are two tabs: *e.g.*, "Client Table and "Client Favorites." To set either tab as the default, right-click on it and select "Set as Default."

Saving Documents

When you click on “Save,” the following screen appears. Tabs for your various Cabinets, Favorite Matters, and Quick Profiles are at the left of the screen.


Worldox GX4 - Corel WordPerfect 17 - File Save As

Description

Profile Group: Heckman Consulting - Legal

1. Author

2. Client: WOR

Click 'Client' or press [F2] to see table

0010 World Software
0106 Worldox in One Hour for Lawyers
0283 Medical [redacted] (Worldox)
0321 [redacted] Group (restore Worldox)
0205 TMP Worldwide

3. Matter

4. DocType

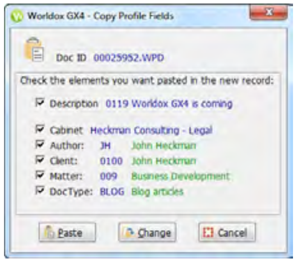
Save as type: WordPerfect 6 - 17 (*.wpd)

To save your document, simply fill in the fields as desired and click OK. You can Tab from field to field. Some fields are set to record the last item entered and may already be filled in. Most options for filling in fields when searching for a document (under “Searching”) also pertain here. In additon:

- Just begin typing any information, including any client or matter description, and a list of matches appears.
- If you click on the “Favorite Matters” tab, then double click on a given Favorite Matter, that information will be filled in.

When you fill in the “Description” field, simply hit Enter to generate Comments on a second line. Comments are essentially unlimited in length.

Same Profile As


Worldox GX4 - Copy Profile Fields

Doc ID 00025952.WPD

Check the elements you want pasted in the new record:

☑ Description 0119 Worldox GX4 is coming
☑ Cabinet Heckman Consulting - Legal
☑ Author: JH John Heckman
☑ Client: 0100 John Heckman
☑ Matter: 009 Business Development
☑ DocType: BLOG Blog articles

Say you emailed someone a document and they send it back to you with revisions. To save the document as a version of the document you sent out, just click “Save as a Version...,” then select the original document you wish to make a new version for. You can select what information you want to copy to the new document.

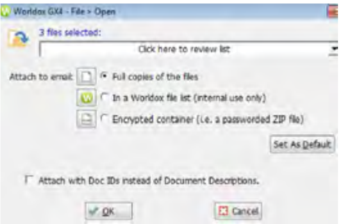
Verify the desired information, then click “Paste” and then OK to save a version.

Sending Email with Attachments

Most people start from Outlook and click “attach” when they wish to attach a Worldox file to an email message. This opens Worldox and lets you pick the document(s) to attach. However, you can also send email starting from Worldox. This lets you select the documents before doing the email text.

One very significant advantage to starting from Worldox is that if you attach a large number of files with long file names starting from Outlook, you may get an error message and Outlook will prevent you from attaching all the files you need. If you start from Worldox, this Outlook restriction is bypassed.

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.”


Worldox GX4 - File > Open

3 files selected:

Click here to review list

Attach to email:
● Full copies of the files
○ In a Worldox file list (internal use only)
○ Encrypted container (i.e. a passworded ZIP file)

☐ Attach with Doc IDs instead of Document Descriptions.

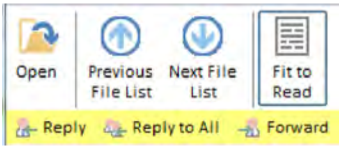
If you have checked more than one item, a box appears to verify that you wish to send all checked files. Make the appropriate selection. Another box then appears asking how you wish to send the files.

Full copy of the file means that the entire file is attached.

“**In a Worldox file list**” is for internal use only. It attaches a pointer to the file not the file itself. So when the recipient opens the “attachment,” they are opening the actual file in Worldox, not a copy that has been emailed. This avoids having multiple copies of the same document floating around the office.

Important: If you are sending an email internally, **but** the recipient is likely to access it via a smartphone, attach a full copy of the file, as the link will not be available from the smartphone.

Worldox also lets you Zip multiple files to save space and send them as a single file (passworded if you wish – be sure to send the password in a separate email).

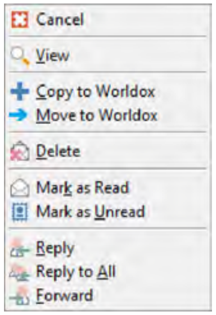


You can also reply to or forward an email that has been saved in Worldox. When you open the email in the viewer, you see these options:

You can open the email in Outlook by clicking on the “Open” button. You can also Reply, Reply to All or Forward the email by clicking on the relevant tab. If you have difficulty (due to Outlook settings), open the email in Outlook and reply from there.

Managing Email From Within 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, as well as contacts or appointments.



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 to Worldox using this function, 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. Right-click on the attachment at the bottom of the email and choose "Save As." Profile and save the attachment.

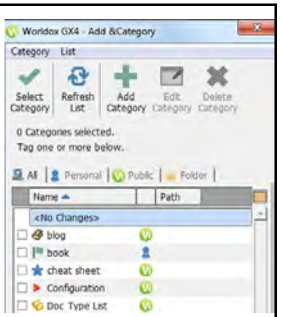
The other Outlook categories (contacts, appointments) appear as lists, but if you View a contact (F9) the Outlook Contact card appears (the Reading Pane does not appear when managing Email, you must use the Viewer).

Managing Email from a Smartphone

You can also manage email from a smartphone, since your "Favorite Matters" appear as folders in Outlook. Simply drag and drop an email to the desired Favorite Matter. There are some restrictions and some Worldox configuration necessary for this to work properly:

- Outlook has to be open and running on your desktop for this to work.
- To make sure all fields are filled out, create an email "Cabinet default" and click on "Do Not Show Again" the first time you save an email to that matter on your computer.
- In addition, this only fills in the fields that are directories. You will have to create a Quick Profile that fills in the other fields (e.g., doc type = Email; Author) for the process to be totally automated.

Categories



0 Categories selected.
Tag one or more below.

Categories let you organize and structure files over and above what is available through Cabinet information. If you plan to use this feature frequently, you should add "Categories" to the button bar and column display.

When you save a document, there is an option to add a category to the profile. Simply type in the desired category. Repeat to select multiple categories. You can also click the Categories button and select the desired categories. If you are on the list display, right-click in the Categories column and select Edit | Assign Categories. You can assign multiple files to one Category from the Categories column, but not with the Category button on the button bar.

You can create public categories (if you have rights to do so), personal categories, or ones that are tied to a particular folder (e.g., for a specific matter). You can assign multiple categories to the same file. Each category has an icon (there are more than 500 available). When multiple categories are assigned to a file, only the icons may display in the Categories column.

Categories can be useful for litigation firms to assign things such as privilege levels or discovery information. They can also be used to indicate documents needing review or approval, or draft, final or executed versions.

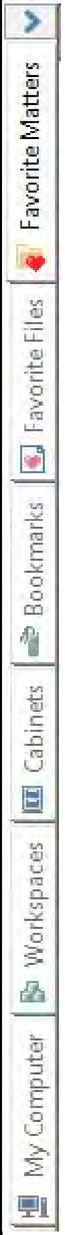
Relating Documents

If you are working on a project or have a number of documents that "belong" together – for example, exhibits or any sort of table of contents, you can relate them and keep them together as a group. This is separate from the "Projects" feature. To relate documents from the list view, 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. A "related" column in the list display shows whether a document is a Parent or Child. Thus a listing of "P3" shows that the document is a Parent with 3 Child documents. You can also relate a document when it is initially saved.

To Edit Profile Information from the Display List

To edit profile information, click the "Edit/Move Profile" button at the top or bottom of the screen. Ctrl-E also opens the full Profile edit screen.

If you simply want to change the description information, click once on the file listing, pause, then click again (just as if you were renaming a document in Windows). The description opens up and you can modify it. You must click the green check mark to save your changes.



Navigation Pane Tabs

The Navigation Pane appears as a bar at the left of the main display and other windows. It can be toggled on and off with Ctrl-T.

Favorite Matters

The "Favorite Matters" feature brings together all matters you have worked on in the last 30 days. They are based on the directory structure determined by the selected Cabinet. Navigate the same way you would in Windows Explorer. You can change the sort order of the list and remove items from it to streamline it if desired by right-clicking on the matter and selecting "Remove" (they will come back on the list if you open them again). You can toggle individual items on and off in the main display by clicking the Heart icon to the left of a document listing.

Favorite Files

These let you choose all the files of a given type you have accessed in the last 30 days (with a maximum of 20).

Bookmarks

These replicate the Bookmarks on your Bookmark bar. In addition, any Bookmarks that you have not "pinned" to the Bookmark bar appear here.

Cabinets

Formally called Profile Groups, these are the organizational "buckets" or digital filing "Cabinets" you will save documents to.

Workspaces

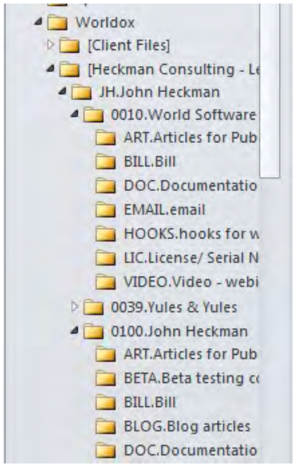
You can subscribe to folder-based (but not search-based) Bookmarks to make a Workspace. Right-clicking on any Workspace lets you create a new Project. Many firms want to be able to group documents into a "project" over and above other Profile fields that Worldox offers. For example, it can be useful to group all the documents required for a real estate closing, all Exhibits for a trial, etc.

If you use this feature, it will also show you the last 5 Projects you opened under "Recent Projects."

- Select a Project in the Workspace and then drag and drop any files you wish to add to the Project. Double-click on the Project to display the contents. You can change the display and then export a "table of contents" for the Project to Excel by printing it to a *.CSV file.

Right-click on a Workspace item and select "Remove" to take it off your list. This does not delete the project, just removes if from your list.

"Drag & Drop" to Worldox



Worldox
  [Client Files]
  [Heckman Consulting - Le
    JH.John Heckman
      0010.World Software
        ART.Articles for Pub
        BILL.Bill
        DOC.Documentatio
        EMAIL.email
        HOOKS.hooks for w
        LIC.License/ Serial N
        VIDEO.Video - webi
      0039.Yules & Yules
      0100.John Heckman
        ART.Articles for Pub
        BETA.Beta testing cc
        BILL.Bill
        BLOG.Blog articles
        DOC.Documentatio

Favorite Matters now "follow" you to Outlook. The matters you have worked on during the last 30 days appear in a "Worldox" folder in Outlook. The list is updated automatically if you access additional matters.

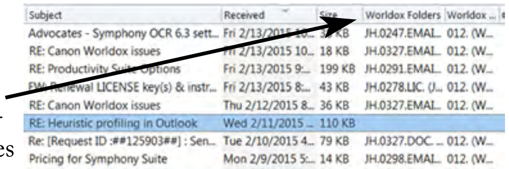
The list shows the client/matter ID as well as the description. You can drag one or more emails to the full client/matter/doc type displayed. This will pop up a profile form so you can add additional information and make any changes desired to the description (replacing or adding to the "RE" information on emails that have been exchanged multiple times for example).

Important: By default this MOVES the email to Worldox. To copy email, hold down the Ctrl key when dragging and dropping. Also, if you cancel out of a move, the email will be left in the "manually profile" section under the "Worldox" folder.

Note: Double clicking on any of the existing sub-folders, will do a "reverse" lookup and find all the emails stored in the directory the Quick Profile was set to. Depending on how Worldox is configured, this may mean all the files for a given Client/Matter. In other cases, you may only see all the emails.

Heuristic Profiling

You can now display suggested Worldox client/matter information within Outlook. This makes it considerably easier to copy or move emails to Worldox. Using Field Chooser in Outlook, create three User-defined fields: Worldox Folders, Worldox Fields and Worldox Cabinet. You can then display these columns in Outlook.



Subject	Received	Size	Worldox Folders	Worldox ...
Advocates - Symphony OCR 6.3 sett...	Fri 2/13/2015 10...	3[illegible] KB	JH.0247.EMAIL...	012. (W...
RE: Canon Worldox issues	Fri 2/13/2015 10...	18 KB	JH.0327.EMAIL...	012. (W...
RE: Productivity Suite Options	Fri 2/13/2015 9:...	199 KB	JH.0291.EMAIL...	012. (W...
FW: Renewal LICENSE key(s) & instr...	Fri 2/13/2015 8:...	43 KB	JH.0278.LIC. (J...	012. (W...
RE: Canon Worldox issues	Thu 2/12/2015 8...	36 KB	JH.0327.EMAIL...	012. (W...
RE: Heuristic profiling in Outlook	Wed 2/11/2015 ...	110 KB		
Re: [Request ID :##125903##] : Sen...	Tue 2/10/2015 4...	79 KB	JH.0327.DOC ...	012. (W...
Pricing for Symphony Suite	Mon 2/9/2015 5:...	14 KB	JH.0298.EMAIL...	012. (W...

Using Worldox to Archive Emails

Many senior attorneys may have 10,000 or even more completely unsorted emails in their Inbox. One approach to resolving the problems that this causes is to mass archive old emails into Worldox.

For example, you could create an email "matter" for each user and "doc types" for 2012email, 2013email, etc. Then select and move all the emails for a given year to the respective doc type. This lets the attorney keep recent email in Outlook, but still make it much more efficient to find older email since the email will be searchable both by To/From and text in the email.

General Considerations on Managing Email

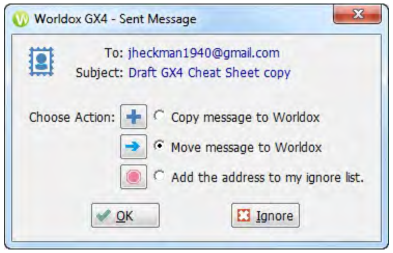
Should you copy or move email to Worldox? In the abstract, it is more efficient to *move* email to Worldox (which deletes it from Outlook). The email will be better organized, easier to find and moving it relieves pressure on your Outlook/Exchange system. However, there are two issues to consider:

- Many attorneys get very nervous if they cannot access their email through Outlook (even if they have 10,000 unsorted emails and "access" is relative).
- More importantly, if attorneys are accustomed to accessing their Outlook inbox via Outlook Web Access or a smartphone, when emails are *moved* to Worldox, they will no longer be available via smartphone or OWA.

Therefore many firms prefer, at least initially, to have users copy emails. A related option is to Archive very old emails to Worldox (see facing page).

By default, the subject line of the email becomes its description in Worldox. However, with many exchanges of emails the "Re:" line frequently comes to have little or no relation to the actual content of a given email. Therefore it is a good practice to at least think about changing the subject line to something more useful and easier to search for (the original subject line will be preserved in the actual email as it is saved to Worldox).

Profiling Email on Send



To: jheckman1940@gmail.com
Subject: Draft GX4 Cheat Sheet copy

Choose Action:
○ Copy message to Worldox
● Move message to Worldox
○ Add the address to my ignore list.

After you send an 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, Worldox remembers this and fills in the information you used last time. You can also add the email recipient to "my ignore list" if you do not want to be prompted again for email to that user (for example, for personal email). If you don't want to store this particular email in Worldox, but will want to save other emails to the same person, click the "Ignore" button.

Managing Incoming Email Using Outlook

You must manage your incoming and historical emails manually. In Outlook, use the "Copy to Worldox" or "Move to Worldox" buttons (you can customize Outlook to put these on the Ribbon bar). If your Inbox does not have client sub-folders, sorting your email by the "From" column may make it easier to move into Worldox. You can move emails in large batches as long as they are all moved to the same Client/ Matter/Doc Type. Do NOT drag & drop emails to WorkZone, as doing so changes the date of the email.

My Computer

My computer is a "Windows Explorer on steroids." This is primarily useful for scrolling through Legacy documents.

Moving Legacy Documents into Worldox

The firm's pre-existing ("Legacy") documents are full-text indexed. You can search for them by the file name (now the "description") or by any text in the file. Alternatively, you can access them through the directory tree. Once folders are displayed in Worldox you can search folder names just by starting to type.

Once you find a file, you can View it with the Viewer. You can cut and paste from the old document into a new document. You can also print out a draft.

However, in order to *edit* legacy documents they *must* first be moved into the Worldox system. 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, but under a "legacy" folder. To move the document, double click it. You will be asked to choose a Cabinet (*e.g.,* "Client Work") and you will then see a profile screen with the existing name of the document inserted as the "Description." The firm may create an "Imported" doc type to facilitate moving documents in batches.

Fill in the required information and/or change the "Description" and click OK to move the document. Click "Yes" to open the moved document.

You can move multiple documents if they are all in the same directory and will have the same profile information (Client/Matter/ DocType etc.). To do this, select the documents you wish to move by clicking in the check box to the left of the document in the Worldox window. A green check mark will appear. Right-click in the document area and select "Move," or click the Move/Edit Profile button on the button bar.

Batch Moving Discovery Documents

You can now copy large batches of documents, including sub-folders, into Worldox. In Windows Explorer, right-click on the folder (except for Legacy documents) you wish to move and select "Save to Worldox." Fill in the profile information and save the documents. While the documents will all be copied to the same client/ matter/doc type, each document will have a comment in the form of "copied from c:\discovery\ jones\bank information\statements\January 2015 statement.pdf." In addition, you will be prompted to create a Project (which you will be able to see in Workspaces) for all documents copied. You might wish to create a "discovery" or "imported" document type to make locating these documents even easier.

Taking Documents With You

There are two main options for taking documents with you: Check Out and Send To. If you Check a document Out, then no one else can work on it (although they could make a copy and start a new document). This prevents the situation where two people make conflicting changes and there is no way to know whose changes were actually saved and whose changes were lost.

If you simply want to take copies of documents with you (for example to court or to a client) but do not want to edit them, you can copy documents (or files for an entire matter) to a CD or USB key drive, assuming that firm security standards allow this. If you do this, be aware that someone in the office could edit any of the documents you have. If you also edit the same document, there is no way to resolve any difference and "the last changes win" (the previous changes are wiped out).

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

To put additional documents on your "Mirror Drive" (which automatically saves a copy of everything you work on to your local hard drive for 7 days) 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. When you plug your laptop back in to the network you will be prompted to reintegrate documents you have worked on to the main Worldox system.

- To simply "send" the file to a USB key, select the "send to" option. If a USB key is plugged in to your computer, its drive letter will appear first on the list (the drive letter will be different on different PCs).
- 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.

Drag & Drop: Copying Files

You can now drag & drop files directly from the Worldox file list to your desktop, a Windows Explorer window (not including Worldox data folders) or to Web uploads (such as Dropbox) that let you "drag files to upload).

If you need to copy files to a CD/DVD, you can right-click in the File List and use the "Send To" the Windows CD/DVD feature; use a CD creation program such as Roxio; or copy files to a local directory and burn the CD from there.

Using WorkZone

A feature called "WorkZone" at the top center of your screen enables you to "drag & drop" multiple documents, attachments, or (using Windows Explorer) any other file directly into Worldox. If you right-click on a file you can select "Send to Worldox," but this only works with one file at a time. You can enable or disable the WorkZone by right-clicking on the Worldox icon in the system tray and selecting "Enable Workzone" or "Disable WorkZone" depending on whether it is running.

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 copied and saved to Worldox. Do NOT use this to drag emails into Worldox, as it will change the date of the email.

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.

Note that this *copies* the file to Worldox. It leaves the original file on your hard drive.

Scanning / PDFs

"Text searchable" PDFs are indexed by Worldox. Worldox does not provide any scanning or PDF conversion natively. However, later versions of Word allow you to convert directly from Word to Acrobat. Some other programs (such as pdfDocs) will convert from Worldox: right-click on a document and select "Send to" to list the PDF conversion options installed on your PC. This is not available for Acrobat itself.

Keystroke Shortcuts

Many Worldox functions have keystroke shortcut equivalents. Some of the most useful include:

F2	Search field
F9	Displays Viewer
Ctrl-T	Toggles the Navigation Pane on or off
Shft-F6	Toggles Comments in the display list on or off
F7	Move a File
F8	Copy a File
Ctrl-E	Edit a Profile
Ctrl-M	Email selected documents
Ctrl-O	Direct Access from Worldox display list
Ctrl-D	Bookmark the visible list
Alt-Ctrl-R	See Relations of a File
Alt-Ctrl-V	See Version List of a File