Online Worldox Classes From Heckman Consulting

As clients have upgraded to Worldox GX3, and/or added or changed users, a number of clients have asked me recently for Advanced and/or Administration training in Worldox GX3.

Consequently, I have put together two classes, each of which will be approximately an hour and a half. The topics below should be considered a baseline: every class will be customized for the specific requests and needs of individual clients.

Advanced Worldox
- Advanced Searching
  - Boolean Options
  - Searching by Date Range
  - Finding by Doc ID
  - Using Tags
- Customizing Displays
  - Customizing the Worldox File Display
  - Creating bookmarks
  - Associating screen displays with bookmarks
  - Adjusting colors & display
- Creating and using Projects and Workspaces
- Quick Profiles
- Categories
- Same Profile As / Saving Returned Attachments
- Email Integration with Worldox

Worldox Basic Admin
- Indexer
  - Options: Email, Excel
  - Trouble Shooting
  - Scheduling
- Best use preference settings
- Quick Profiles / defaults
- Adding New Users
- Audit Trails
- Document Retention
- Security Classification Groups
- Ethical Walls

Classes are specific to one firm, so that we can train using the firm's actual data. They include a 20-minute review of the firm's system prior to training. Additional customization performed after or outside of training will be an additional charge, although some changes can be made during the actual course of training. Classes will be conducted via webinar software, preferably in a conference room with the screen projected on a wall. Alternatively users can remain at their desks, although this is less desirable.

The cost is $300 per class, or $550 for both classes, payable in advance.