

How To Use Categories

The Categories feature existed in Worldox GX3, but was not very robust. In Worldox GX4 it is fully integrated into the profile screen when you save a document. I have had several clients ask me " what good is this feature?" " how can I use it?"

Worldox only lets you assign a single document type to a document. Thus you cannot have a file that is listed BOTH as email and correspondence for example. A common request is for the ability to save a document to two document types or two matters, for example an email to an attorney or real estate broker that deals with multiple matters.

Many firms want to be able to add additional metatags to further describe a given document. Of course, you can add keywords to the description or comments but this depends on the discipline of your users and proper data entry. Neither of these approaches are reliable in the sense that you cannot guarantee uniformity and consistency.

Categories allow you to attach one or more metatags or keywords to a document.

Litigators frequently make extensive use of this functionality. Thus they can add Categories such as privileged, needs bates number, partially discoverable, question about discovery status, reviewed for expert discovery, key document, helps other side, hurts other side, and so on. Workers Comp firms might want to use Categories to organize types of injury among clients.

Transactional Firms might use categories to describe what might be referred to as " non-standard or unusual boilerplate." For real estate firms, perhaps documents that refer to non-standard easements, conservation or ecological conditions, or similar. More generally, any unusual but recurring provisions. This would help alleviate the frequent: " I know I used that provision before, but what client was it?"

Workflow items. Other firms might use categories such as draft, final and executed copy, although this might be better accomplished through Worldox's version control feature. Some firms have a " new client no number yet" " matter" to put documents for brand new clients not entered into the time & billing system yet. You might create a Folder category for each of these clients. This would make it easier to find them and move them to the proper matter once it is created.

If a firm has gone paperless, and the receptionist scans all incoming mail, how is an attorney to know he has received a letter? You might use categories such as JH_to_review; HC_to_review and so on. The attorney searches for documents she needs to review and removes the category when the documents have been processed.

There are three levels of Categories: Public, Personal and Folder. Thus the firm can decide on and implement public categories: similar to document types but with additional functionality.

Personal. Individual users can implement their own personal categories. The obvious advantage is that you can use whatever conventions are most useful to you. The obvious drawback is that no one else sees your categories and therefore they are not useful for the firm as a whole.

Folder. Lastly, you can implement categories specific to a particular Folder, generally equivalent to a specific Matter. So if you want to add particular sub-divisions to a particular matter (special characteristics, players involved, etc.) you could add them as Folder categories to that matter.

Combined with the ability to attach multiple Categories (or metatags) to a particular document, this significantly expands your ability to keep track of your documents in a very detailed way. If you think of times or ways you want to add characterizations to documents or workflow issues, you will begin to get a list of how Categories can be implemented. Firms should seriously consider implementing this feature. Individual users you want to create their own personal systems will also find them useful.

Creating and Using Categories

When you save a document, there is an option to add a category to the information associated with the document. If you know the category, you can simply type one or more categories. You can click the Categories button to select the desired category. You can assign multiple files to the same category from the Categories column in the list display.

To create a new Category, simply click on the Category button and select "Add/Edit Categories". Follow the prompts and assign an icon to the category.

To select a category from a list, just click "Select Category", the type of category, and the desired category.

