

## 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:



Select the desired option and proceed depending on the option selected.

To see the various versions a document has been through, click the Ver List icon on the button bar.

## 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 Trail." You see the audit trail for that document.



This enables a user to track the exact history of the document they are concerned with.

## 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.

# Worldox 2002 Cheat Sheet

## Basic Worldox Screen

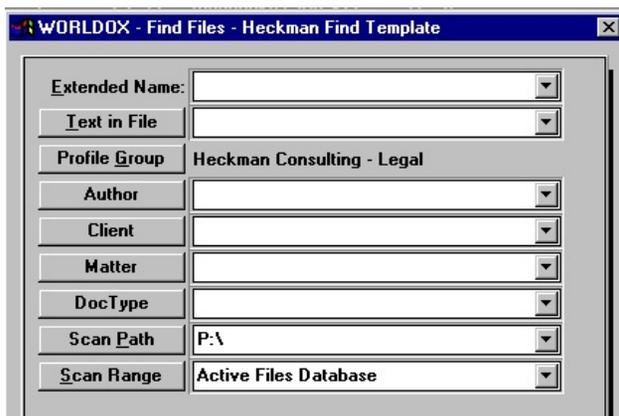
Worldox comes up when you select File Open or File Save. When you select File Open you see something that looks like the following screen.



- By default, you see your last 20 documents, sorted with the most recent on top. The display is fully customizable. The display is sorted on the column that contains the red triangle next to the name of the column. Click on a triangle to change the sort order by column or A-Z; Z-A.
- Click on the appropriate icon for other functions:
  - Click the Favorites icon (with the heart) at any time (e.g., after a search for other documents) to see the last 20 documents you worked on.
  - The View icon launches a viewer so that you can see the document the cursor is on without opening it. If you did a full-text search, "View" will show the "hits" in any document you open.
  - Click the Copy, Delete, or Move icons for those functions (for example to copy an older document as the basis for a new one).
  - Ver List shows you all the versions of the document that exist and allows you to open the one you need.
  - Find (the binoculars) opens the search screen if the document you want is not on the list (see over).
  - Email the documents your cursor is on by clicking on that icon.
  - Right click on any document listed and then select Audit Trail to see the history of the document (see inside).
  - Print produces a report of the files listed on the screen, it does not print the document the cursor is on. To actually print a document, you must open or view it first.
  - For advanced searches and managing email, see inside.

## Searching for a Document

If you need to find a document that is not one of the last 20 you have worked on, click **Find** to launch the search screen. Click  to launch a basic search or select "repeat last find." Your screen may be slightly different than the following, but the search principles are the same.



There are three ways to enter information in this screen:

- If you know the desired information, type in it the appropriate box.
- To get a list of available items to be searched for, click on the labeled button to the left of the text box (*e.g.*, Doc Type).
- To get a list of recent searches, click on the down arrow to the right of the box (  ).

### Quick Searches

If you already know the number (*i.e.*, the DOS Name) of a document, you can do a "Quick Search." From the Worldox screen, press **Ctrl Q** for a "Quick Access" template.

- Simply fill in the document number next to "Doc Name." You do not have to fill in leading zeros or the file extension. Click  to perform the search.

### Boolean Searches

- **AND.** To find the occurrence of two words in the same document, connect them with the word AND, *e.g.*, January AND bill (in the Text in File or Extended Name fields)
- **OR.** To find occurrences of either word in the same document, connect them with the word OR, *e.g.*, January OR bill.
- **NOT.** To find occurrences of one word but not the second in a document, connect them with the word NOT, *e.g.*, January NOT bill.
- One word within "x" words of another: first w/x second, where "x" is the number of words: *e.g.*, accident w/10 damages.

## Moving Legacy Documents into Worldox

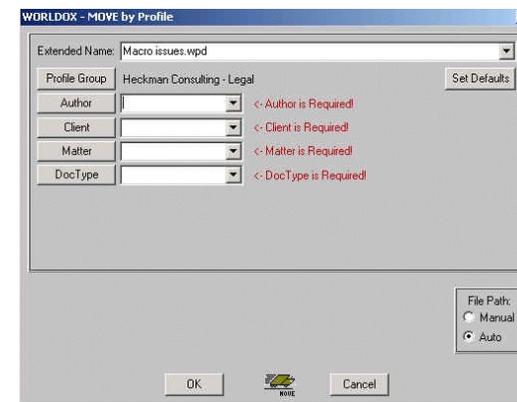
Existing documents *must* be moved into the Worldox system before they can be edited. Documents may be moved on an as-needed basis or in batches. To begin, use the Explorer-type window at the left of the Worldox screen to navigate to the document you wish to move. This is located in exactly the same place as it has always been. To move the document, double click to open it. You will be asked to choose a profile ("Client Work") and you will then see a profile screen similar to the following:

The old name of the document will be inserted as the "Extended Name." You may change this as desired.

Fill in the required information (some may already be set as a default) and click  to move the document.

Click "Yes" to open the moved document.

To move multiple documents at one time, select the documents you wish to move in the Worldox document list by clicking in the check box to the left of the document.. A green "X" will appear. Right-click in the document area and select "Move," or click the Move button on the button bar: (to the right of the trash can icon). If you move multiple items, they will all contain the same profile information (except for the extended name).



## Customizing Worldox

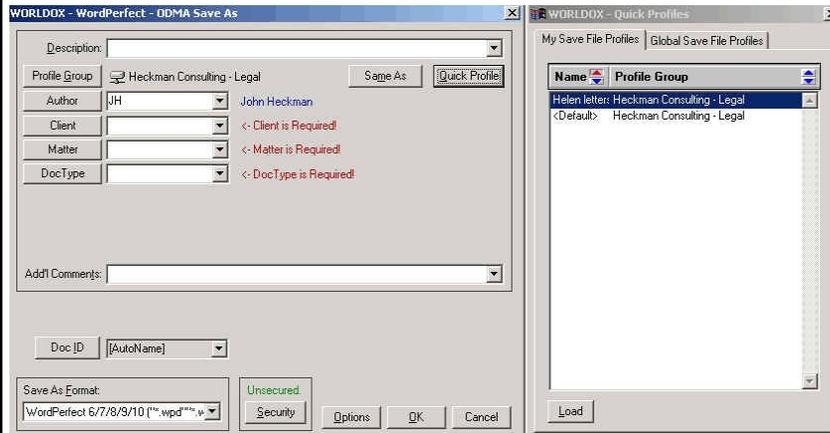
Worldox can be extensively customized. Settings that can be customized by the end users include:

**Large Icons or Small.** By default, Worldox is set with small icons. To switch to large icons, select Options | Preferences | Display Options. Click on "Mini Button Bar" and then Edit Settings. Change the setting to "No".

**Order of column display.** To remove a column from the display, "grab" it using the mouse and drag it off the bar. To add a column, click and select which column to add. Click and Drag on the left or right side of a column header to change the width.

## Save / Save As

When you click on “Save,” the following screen appears. To save your document, simply fill in the fields as desired and click  . Some fields are set to record the last item entered and may already be filled in. The options for filling in fields when searching for a document (under “Searching”) also pertain here. Note that anything you put in the “comments” field is also indexed with the profile.



## Quick Profile

Worldox 2002 has a new “Quick Profile” feature that allows you to save profile information. Thus, if you frequently work on documents for the one or more clients, you can save that profile information (e.g., Client No., doc type) to a “Quick Profile.”

To do this, enter the profile information once, then click on the “Quick Profile” button at the top right of the main Profile screen. Give the Quick Profile a name. Then, when you want to re-use it, instead of having to fill in the information, simply double click on the quick profile listing in the right-hand window and the information will be entered. If you frequently work on similar documents for certain clients, this can be a time-saver.

You do not have to fill in every field in the profile screen; some information can be left blank (such as doc type or the Description). The Quick Profile will fill in partial information if that is what you wish to save.

## Saving and Customizing Searches

With Worldox 2002, recent searches appear on a separate tabbed search bar. Therefore it is possible to repeat your most recent searches without having to re-enter all the information. The most recent search appears by default.

If you start a second search, it replaces the previous item. To save the previous tab and create a new one, click the “New List” button. Click on any search listed to repeat it. The quick searches are cleared when you reboot the PC or exit Worldox

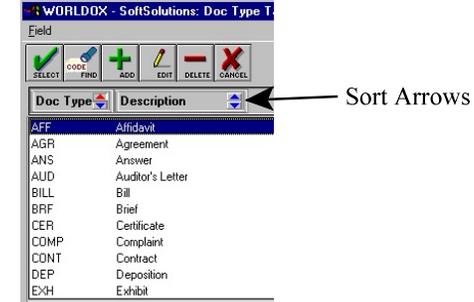
To permanently save a search and give it a name (for example your forms, or all the files for a particular client), first perform the search. Then click the yellow file folder icon at the very left of the second row, above the “Email” button:



You are then asked to name the search. This will appear as a button on the second row of buttons. Right click on any button to edit or delete it.

## Sorting Search Screens

You can control the order in which items are sorted in any Worldox screen. At the right of each column header there are two arrows, one pointing up and one down. The red arrow indicates which column is sorted, and in which order (up for A-Z, down for Z-A). To change the sort order, simply position the mouse over the appropriate arrow (it will change to a small arrow to match the one on the screen) and click:



If the list is very long (such as a client list), you can search for, e.g., the client, by starting to type the client name (if the list is alphabetized by client) or the client number (if it is sorted numerically).

## Managing Email using Worldox

It is possible to manage your email from within Worldox. Simply click on the "Email" button to see all your email, including that in folders.

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 a copy in Worldox.

The other functions are self-evident.

When you copy or move an email into Worldox using this function, it is saved in a read-only format and cannot be edited. Any attachments to the email are also saved with the email. If you wish to save an attachment separately, open the saved email from within Worldox. You will also see the attachment. Right-click on the attachment and choose "Save As." Profile the attachment. It will be saved and also automatically related to the email (see below) so that you can always see where it came from. You can also do this using the DropZone, though the procedure is different.

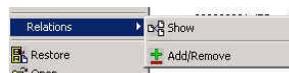


## Relating Documents

Documents can now be related to each other, so that when you find one, you can see them all in a "related" window.

To relate documents, right click on the document listing and select "relations." Then click "Add."

Clicking the green "+" brings up Worldox again. Click the check box at the left of each item to relate it to the original document. To search for other documents to relate, simply click the "Find" button and perform a normal Worldox search.



To see the list of related documents, click the "Show" icon.

## Check-Out Check-In

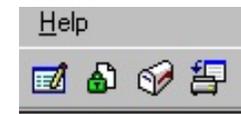
Email has become the standard way of sending documents to other people. However, you may occasionally need to copy a document to a floppy to send it to someone. Right click on the document you wish to send and select "Check-Out." Change the check-out options as desired (for example, if you are sending the file to a client, you may not want to change its security).

## Sending Email from Worldox

When they wish to attach a Worldox file to an email message, most people start from the Email and click "attach." This opens Worldox and lets you pick the document and attach it.

However, you can also send email starting from Worldox (assuming your system is properly configured). There are some advantages to doing this.

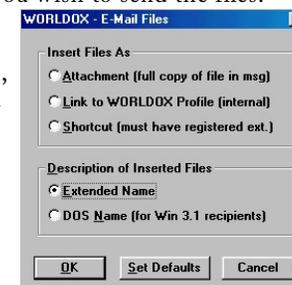
First select the file or files you wish to email. If you wish to send more than one, check the desired documents by clicking the box to the left of the document name. A green "X" will appear. Then click the mailbox on the button bar (under and to the right of "Help"):



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:

If you are sending documents outside the firm (to someone who is not on your Worldox system), check "attachment" and "Extended name" (otherwise they will get a document named e.g. 002345.wpd).

Click OK. Your email will open with the documents already attached to the message.



## Using DropZone

Worldox also has a feature called "DropZone."

This enables you to "drag & drop" email messages, attachments or, using Windows Explorer, any other file, directly into Worldox. The "DropZone" is an icon that looks like a parachute.



It is always on the top of your screen:

When you release, the following screen appears:

Select the "Public Default Profile" and the appropriate Profile on the right if necessary. Click the "Save" icon (the small diskette) and the Worldox template will open.

Fill this out normally, and the email, attachment, or other document will be saved.

