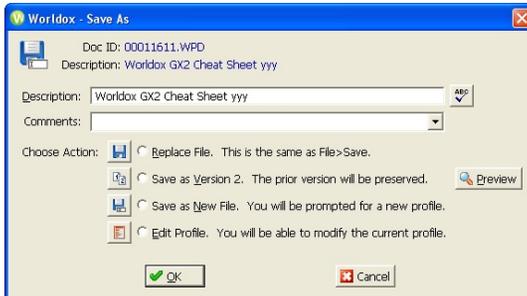


## Version Control

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. 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.



## 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 GX3 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 basic Worldox screen.



- By default, you start with your last 20 documents, 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 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 (the magnifying glass) 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 view.

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. Lastly, you can set a default size for view (click on “Window” and select “Save Size & Position”).

- Click the Copy, Delete, or Move icons for those functions (for example to copy an older document as the basis for a new one).
- Find (the binoculars) opens the search screen if the document you want is not on the list (see p. 2).
- Email the document your cursor is on by clicking on that icon.
- 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, right-click on the document and select Print.
- See page 15 for details of the Form Bar at the bottom of the screen



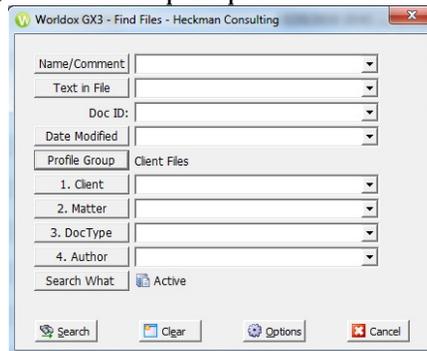
Searching . . . . .	2
Saving Docs . . . . .	4
Check-Out/In . . . . .	6
Navigation Pane . . . . .	8
Email Issues . . . . .	10-13
Legacy Docs . . . . .	14
Customizing . . . . .	15
Versions . . . . .	16

## Searching for a Document

If you need to find a document that is not on the main screen, click **Find** to launch the search screen (or click on one of the “Quick Search” Bookmark buttons – facing page). You may have to select the Profile Group you need. If necessary, click **K** to launch a basic search or select “repeat last find.” Your screen may be slightly different, but the search principles are the same.

There are three ways to enter information here:

- If you know the desired information, type in it the appropriate Name/Comment or Text in File box. Worldox supports wildcards, so typing “prod\*” will find “produce” and “production.”
- In addition, you will see a list of words actually in the index when you start typing.
- To get a list of available Client/Matters/Doc Type items to be searched for, click on the labeled button to the left of the text box.
- To see recent searches, click the down arrow to the right of the box ( M ).
- The Client/Matter/Doc Type fields will auto-fill as soon as they are unique. Thus typing “plea” may automatically fill in “Pleading.”



Open With. Worldox recognizes document types. If you are in Word and try to open a PDF file, a screen will pop up asking you if you want to open the file with Acrobat. Similarly for Excel and other programs.

## Boolean Searches

Boolean searches work for both text and Profile Group information.

- **AND.** To find the occurrence of two words in the same document, connect them with the word AND, *e.g.*, January AND bill. Similarly, in the Doc Type screen, “pleading or motion.”
- **OR.** To find occurrences of either word in the same document, connect them with the word OR, *e.g.*, January OR 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.** To find occurrences of one word but not the second in a document, connect them with the word NOT, *e.g.*, January NOT 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.”

## Customizing Worldox

Users can customize Worldox extensively, including the following settings:

**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 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 also associate a column format with a given Bookmark/Quick Search

Description	Doc ID	Ver#	R?	Modified	DocType	Size
-------------	--------	------	----	----------	---------	------

By default, the documents may be listed in Outlook-style groupings by date. Right-click on the “Modified” column and select “Hide Groupings” to disappear the Groupings. If the document has Versions, the number of the highest version will appear in the “Ver#” column.

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



- “Full List” displays only the full list of documents.
- “Comments” or “Profile” lets you view those elements and edit them on the fly simply by double-clicking on them.
- “Preview” shows you the top of the current document in an Outlook-like preview pane. Since this displays only the very top of the document (e.g., just the letterhead), you may find the main viewer on the toolbar more convenient.
- “Relations” and “Project” show documents included in those functions.
- “Tags” displays the information about the files in the list sized to show the most common items largest. This is very useful if you want to narrow down the search. Click next to “\*.DOC” to see only Word files; click on a doc type to see only that specific 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
Description:	FW:	Re: SPAM-LOW:
Type:	*.DOC	*.MSG *.PDF *.RTF *.WPD
#2: Client:	0010 0037 0039 0058 0063 0065 0080 0098 0100 0111	
	0156 0168 0171 0173 0175 0180 0184 0187 0199 0203	
	0237 0242 0244 0247 0248 0249 0251 0254 0255 0257	
	0272 0274 0275 0276 0277	
#3: Matter:	001 002 003 006 007 009 011 012 014 020	
#4: DocType:	BILL DOC EMAIL FORM LET LIC LIST MISC F	

## Moving Legacy Documents into Worldox

The firm's pre-existing ("Legacy") documents have been 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 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 it out in draft form.

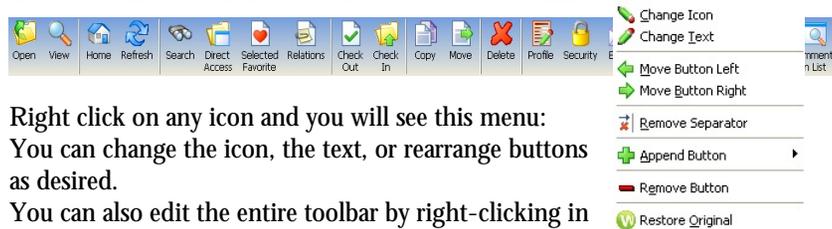
However, in order to *edit* legacy documents they *must* be moved into the Worldox system before they can be edited. Documents may be moved on an as-needed basis or in batches. To begin, use the Explorer-type window at the left of the Worldox screen to navigate to the document you wish to move. This is located in exactly the same place as it has always been, but under a "legacy" folder. To move the document, double click it. You will be asked to choose a profile (e.g., "Client Work") and you will then see a profile screen with the old name of the document inserted as the "Description."

Fill in the required information and/or change the "Description" (some fields may already be set as a default) and click **K** to move the document. Click "Yes" to open the moved document.

You can move multiple documents (up to 500 at one time) 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 button on the button bar (with the Green pointing arrow).

## Customizing the Toolbar

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



Right click on any icon and you will see this menu:

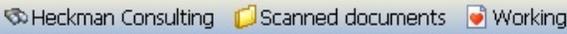
You can change the icon, the text, or rearrange buttons as desired.

You can also edit the entire toolbar by right-clicking in the blank space at the right. If you use the new Category feature, consider adding one or more "Category" icons to the button bar.

## Saving Searches; Quick Search Bookmarks

Recent searches appear on a separate tabbed search bar labeled "Location." 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 20 most recent documents of each 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:

These searches are  dynamic: if you add new documents that satisfy the search criteria, they will appear the next time you perform the search. If you save a search for Client "Jones," you can delete the Bookmark when you have finished working with that client.

### Quick Searches

If you already know the DocID Number of a document, click next to "Location" (or hit **2**) and type the number.



## Sorting Search Screens

You can control the order in which items are sorted in any Worldox screen. 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 column you wish to sort on. Ctrl-click on a different column sorts by descending order.

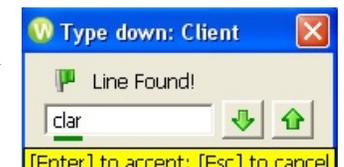
Note also that in some lookups there are two tabs: e.g., "Client Table" and "Client Favorites." Client Favorites represents the last 20 Clients (or Matters, etc.) you have accessed, and can make searches much more efficient.



To set either tab as the default, right-click on it and select "Set as Default."

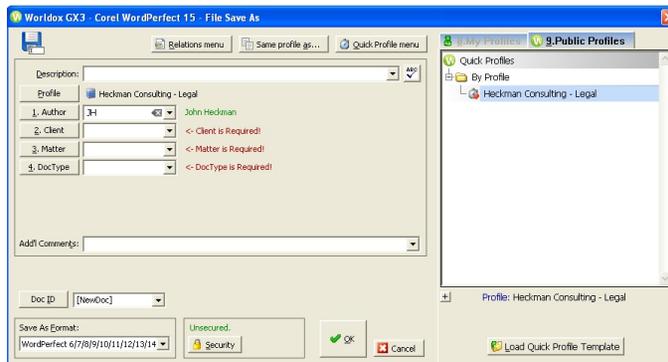
If the list is very long you can search for, e.g., the client, just by starting to type the client name or the client number. You will see the following screen and the selection will proceed to the combination of letters you type :

Everything is searched regardless of the sort order. Type-down search also works on the document list screen. Click an arrow to select the next (or previous) instance.



## Saving Documents

When you click on “Save,” the following screen appears. If necessary, change the Profile either by clicking on the “Profile” button or selecting a Quick Profile to the right of the screen. To save your document, simply fill in the fields as desired and click **K**. You can Tab from field to field. 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. Anything you put in the “comments” field is also indexed with the profile. Comments may be used for additional information, key words, critical issues, etc. See p. 16 for Version Control.



## Same Profile As

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 the “Same Profile As,” then select the original document you wish to make a new version for. A screen will pop up with an option to save the new document as a new version of the old.

## Keywords

If your firm has implemented a “Keywords” table in the Comments field, click in “Comments” and then on the “Insert Keyword” button. This is particularly useful for litigation firms or others that want to have a set list of key provisions, litigation importance ratings or other criteria that they wish to be able to search by. The advantage of using a table is that the terms are always entered consistently and thus searches are more accurate and complete.

## Good Naming Practices

How you name the descriptions can make it a lot easier to find documents 6 weeks or 6 months from now. Avoid common terms (searches will turn up too many “hits”) and try to use things that are specific and/or unusual to a document: client names, special terms or provisions, etc.

## 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.”

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 WORLDX 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.

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).

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 the following 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 Using 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:

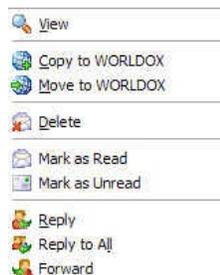
View lets you view the email.

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, it is saved in a read-only format. 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.



## Naming Emails

By default, the subject line of the email becomes the 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).

## Using Worldox to Archive Emails

Many senior attorneys may have 10,000 or even more completely unsorted emails in their in box to which they are very attached. 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 20010email, 20011email, 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.

## Quick Profile

Worldox has a “Quick Profile” feature that allows you to save frequently used profile information. Thus, if your work centers on documents for just a few clients, you can save that profile information (e.g., Client No., Doc Type) to a “Quick Profile.”

To do this, enter the profile information (but don’t save the document), then click on the “Quick Profile Menu” button at the top right of the main Profile screen. You can either create a Quick Profile based on the information you have partly filled in, or select “Add/Edit Quick Profile.” If you use the latter option you have a choice to add information to the Description that will be part of the Quick Profile. Anything you fill in here will automatically be filled in subsequently, so make sure to enter only baseline information.

Give the Quick Profile a name. 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 “My Profiles” screen of right-hand window and the information will be entered. Right-Click on “My Profiles” to save it as a default.

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.

You can create sub-items by putting a backslash in the name (see p. 11). If you click on the down arrow at the right of the entry box, you will see a list of existing Quick Profiles.

## Editing Profile Information

To edit profile information, click on one of the “Profile” buttons 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 screen opens up and you can change the description.

## Printing/Exporting Lists

Any list in Worldox can be printed or exported to a \*.csv file to be edited.

This can be useful if you want to have a printout of Document Types or other lists. You can also export the list of documents displayed on the main Worldox screen by selecting List | Export or List | Print. You can manipulate the resulting file in Excel to use as a table of contents or record of documents released for production, for example.

## Taking Documents With You

There are two 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.

## Copying Files to CD/DVD

If you need to copy files to a CD/DVD, there are three ways to do it.

- If you right click on the file(s) to be copied and select “Send To” there will be an option to copy the files using the Windows CD burning capacity.
- If you use a CD creation program such as Roxio, it can be integrated with Worldox, which will pop up for file selection when you select “Add File.”
- You could create a “Send To” command to copy files to a specific folder and then burn the CD from there.

## Quick Profiles: “Drag & Drop” to Worldox

When you send an email, you are prompted to create a Quick Profile. Quick Profiles contained pre-filled-in information about a document you are saving. For example, if you send a large number of emails regarding a particular matter, you may not want to have to fill in the client/matter information for every email. If you say K to the prompt, a screen appears asking for the name of the QuickProfile Simply type in the name.

If a given client has multiple matters, you can create sub-folders by including a backslash (\) in the name. If you are adding a new sub-folder, click the down arrow and select the main folder. You can then add a sub-folder to it.



When you opt to Copy or Move the next email to that particular recipient, you can pick the information from the QuickProfile list to the right of the Save screen if it is not already filled in.

Quick Profiles created when you save an email will normally show up as “Drag and Drop” folders that let you move emails to Worldox. First check to see that there is a “Worldox” folder in Outlook. When you click on it, the following screen appears.



Depending on how Worldox is configured you may see your Outlook inbox.

To add a quick profile manually, click the “Quick Profile” button. Then repeat the process described above for creating Quick Profiles. Once created, they will show up as a “folder” under Worldox in Outlook.

You can drag and drop one or more emails to the folder and they will automatically be profiled using the information already entered in the Quick Profile. Important: By default this MOVES the email to Worldox. To copy email to Worldox, hold down the Ctrl key when dragging and dropping.

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.

## 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 a relative term).
- 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 emails to Worldox (see p. 12).

## Managing Email Using Outlook

By default, when you send an email, Worldox pops up (see screen below). However, you must manage your incoming and historical emails manually. This can be done either from Worldox or Outlook. In Outlook, use the “Copy to Worldox” or “Move to Worldox” buttons (you can customize Outlook to show these directly on the Ribbon bar). If your Inbox is not sorted into 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.

## Profiling Email on Send

Worldox is set to automatically profile your email when you send it. After you send the 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, you can create a Quick Profile so that you only need to fill it out once. You can also add the email recipient to an “automatically ignore” list (for example, for personal email that you know you will never want to store in Worldox). Rules (under Edit | Address Rules while in the Email screen) give you even more flexibility in automating this process.

Subject to the caveats listed above, it is better to “Move” emails to Worldox rather than “Copy” them. This keeps your Outlook system “cleaner” and Outlook will run with fewer glitches overall.



## Using WorkZone

A feature called “WorkZone” enables you to “drag & drop” email messages, attachments, or (using Windows Explorer) any other file directly into Worldox. 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.



The WorkZone icon should appear at the top center of your screen (to StarTrek fans it looks like a Borg Cube).

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.

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, if you are using Acrobat or almost any other PDF conversion software, right-clicking on a document and selecting “Send to” will list the PDF conversion options installed on your PC.

## Keystroke Shortcuts

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

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
F2	Go to Location field to enter a DocID or other search
Ctrl-D	Bookmark the visible list
Alt-Ctrl-R	See Relations of a File
Ctrl-Shft-V	Create a Version of a File
Alt-Ctrl-V	See Version List of a File
Alt-F11	See the audit history on a selected file

## Navigation Pane

What used to be termed the “Folder Tree” has been reorganized along the lines of the Navigation Pane in Outlook. It can be toggled on and off with Ctrl-T. When you open it, you will see options like this:



## Favorite Matters

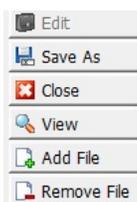
The “Favorite Matters” feature brings together the last 20 matters you have worked on. It displays the list as a directory structure based on your profile groups. Navigate the same way you would in Windows Explorer. You can remove items from the list to streamline it if desired (they will come back on the list if you open them again). To do this, right-click on the matter and select “Remove”.

## Bookmarks

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

## Projects

To create an initial Project, click on the Projects tab at the bottom of the screen. You can drag documents into the Project from any list screen. Save and name the Project. You must manually “Close” this screen, it will not close automatically.



## Workspaces

Once you have created an initial project, you can subscribe to folder-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, all documents needed for a filing, etc. Note that you cannot use search-based Bookmarks as the basis for a Workspace.

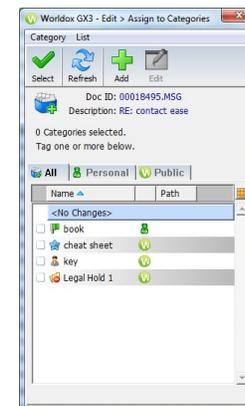
If you use this feature, it will also show you the last 5 Projects you opened under “Recent Projects.”

Once you have created the Project, select it in the Workspace and then drag and drop any files you wish to add to the Project. Double-clicking on the Project displays 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. The Firm may also want to create a “Projects” Profile Group to facilitate use of this functionality.

## Categories

Categories is a new feature. It lets you organize and structure files over and above what is available through Profile Group information. If you plan to use this frequently, you should put a “Categories” information to the button bar and column display.

Right-click in the Categories column, or 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 general categories or ones that are tied to a particular folder (directory). You can assign multiple categories to the same file and sort the Categories column by category. Each category has an icon (there are more than 200 available). When a file is assigned to multiple categories, only the icons may display in the Categories column.

Categories can be useful for litigation firms to assign rankings to documents, privileged categories, production information, etc. To date, however, you cannot search for categories.

## Relating Documents

If you are working on a project or have a number of documents that “belong” together – for example, exhibits or items that need to be filed together, you can relate them and keep them together as a group. This is separate from the “Projects” feature.

To relate documents, 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. You can also create a “related” column which will display whether a document is a Parent or Child. Thus a listing of “P3” shows that the document is a Parent with 3 Child documents.

## Profiles/My Documents in the Navigation Pane

- Profiles lists your profiles and the entire folder structure under the profile. You can use this to navigate the actual profile group document tree, although this will be significantly slower and less efficient than well-designed searches. Client and Matter names are displayed next to the numbers: The Navigation Pane expands automatically when you hover over it to view more information and resizes smaller when you leave it.
- My computer is a “Windows Explorer on steroids.” This is primarily useful for scrolling through Legacy documents.

