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Customizing the Worldox Display

What are the general customization options for the Worldox Display?

The general customization options can be accessed by clicking the little gearwheel just above the column headers in the middle of the screen and selecting Line/Fonts/Colors/Spacing. This lets you change font size, spacing and color of various display items. When the display is how you want it, click OK and then select the gearwheel again and click “Make This My Favorite View” to save your options. The original options are very low-contrast. You might want to choose higher-contrast options, in particular making the text black instead of grey. You might also want to make your text “tighter,” that is, reduce the number of pixels between each item. Lastly, if you add items to the display bar at the bottom, they may display on a second line.

Can I size the viewer so that it opens at a bigger size on my screen?

There are two viewers in GX4. An Outlook-style Viewer Pane opens when you click on the “View” tab to the right of the display. This can be sized by dragging the window to the left or right. To size the main viewer, first open the viewer window (click on the magnifying glass button – second from the left on the button bar or tap F9) to the size and position you want it. Then click Window | Save Size/Position. It will retain this position the next time you open it. This is a great option for large monitors. If you have dual monitors, the main viewer should open full-size on the opposite monitor.

Can I sort the display by different columns?

Yes. To sort by any column in Worldox, hover the mouse over the column header. Toward the top will show an up arrow; toward the bottom shows a down arrow. Clicking the up arrow sorts A-Z (or oldest date to most recent); clicking the down arrow sorts Z-A (or most recent date on top). The column that is currently sorted has a blue triangle at the right of the column name (▲ or ▼). See the next item on how to save the column settings once you have defined them.

Can I put different columns in the list of files?

Yes. Hover over the text of a column header. The pointer changes to a hand. Click to “grab” it with the mouse and drag it off the row of column headers.

To add a new column, click in any blank area on the list of columns and select the title of the item you wish to add. Drag the column to the desired location. Alternatively, open the “Customize” screen and add the columns in the “Property line” space. Going through the “Property line” option may lead to undesired results if you use the Tile view (options may be displayed on multiple lines).

To size columns, position the mouse at the very right edge of the column. It will change to a two-headed arrow and a right bracket (]). Click and drag to expand or reduce the width of the column. Click on the text of the column header. The pointer will change to a hand. Drag the columns left or right to reposition.

Once the display has been configured to your satisfaction, to save a given set of columns, right-click on the header row, select “Save Column Template” and give it a name. If you have Administrative rights, you will see an option to save for Everyone. Click on “Customize” and “Make this my favorite view” to save as the default.

Note: If you regularly use versioning, the related documents feature, or Categories, consider putting a column for these features on your list.

How do I set defaults so that my settings “stick”?

Simply click on the Customize icon and select “Make this my favorite view.” This will save all the display settings as an overall default. More generally, any time you see a heart (on the save screen, for example), clicking on it will set that view as your default for that function.

Can I have different sets of column displays?

Yes. To save a given set of columns, right-click on the header row, select “Save Column Template” and give it a name. To retrieve a given set of columns, right-click on the header row and select “Open Column Template.” Then select the one you want. If you frequently need to print out lists of documents with specific information in the columns, this can be very useful. When searching for emails, you might want to customize a display to include columns for “To” and “From” in a listing of Emails.

Can I change the order of the Navigation Tabs at the left

Yes. Simply click on the little tool icon at the bottom of the tabs. You can change the order of the tabs and select which ones you want to view.

Can I make the fonts bigger - with my display the screen is hard to read?

Yes. Click the “Customize” button at the top of the display list. Then select “1st file line” and “Change Font.” Change the font as desired.

You can also change the color on the rows of the list (like that old green-bar accounting paper). Click “Display” on the main menu bar, then Customize | Colors. Select List: File List. Pale yellow makes for a very legible and not intrusive setting. Pick the color to display on lines 2, 12, 22, etc. Then click "Copy." Go to line 4 and paste for lines 4, 14, 24, etc. Repeat for lines 6, 8, and 10. If you want to set this as a firm-wide display and you are a manager, click on the "Everyone" button to make this the setting for everyone. Click Apply, then OK.

I don't like the date separators - can I get rid of them?

Yes. Especially if you sort your files descending by date the separators may be redundant. To hide them, right-click on the “Modified” column header and select “Hide Groupings.” Once they are hidden, that menu item changes to “Show Groupings,” so you can change the setting if you wish. This is a per-user setting, although if you have saved a defined set of columns for all users, it will default that way on each workstation. Note that this does

not work with the Tile view.

Creating a Bookmark.

One of the most time-saving features of Worldox is the ability to create bookmarks, just as in your browser. These appear in the space directly underneath the button bar. To create a Bookmark, first do the search you want to save. Then right-click on the space immediately below the button bar and select “Add This List.” Alternatively, click Bookmarks | Add This List on the top menu (or Ctrl-Q). Then,

- Give the Bookmark a name.
- If you are an Administrator (“Manager”), decide whether this is to be a firm-wide bookmark. Other users will not see this option, but can create their own personal bookmarks.
- Decide whether you wish the button to actually do the search or just display the template. For example, if you have a partially filled-in template (for example, for all emails, or all spreadsheets) you might choose to show the template in order to fill in other information.
- Decide whether to pin the Bookmark to the Button Bar. Obviously, there is a limited amount of real estate and therefore a limited number of Bookmarks you can have on the Button Bar, although you can have several rows. However, you can have many more on a dropdown list under “Bookmark” on the main menu.

Top Tips and Tricks

What’s the Fastest Way to Find a Document?

- If your firm has implemented Bookmarks, simply click on one of them to initiate a search. This is frequently the most efficient way to do a complex search.
- If you already know the document number, simply type it in the Search field at the top right of the file listing. You do not have to type leading zeros or the document type. If the document name is 00001234.doc, just type “1234.”

How Do I Find My Recent Documents from Within Word With One Click?

In Word, open the Worldox Ribbon Bar by clicking on the “Worldox” menu item. In the middle of the bar, there is a “Document Favorites” item with a little magnifying glass next to it. Click on this and your recent Word documents will pop up in Worldox.

How Can I Make Documents I Use Every Day Immediately Available (“My Favs”)?

The best way to do this is to mark those documents (forms, boilerplate, letterhead, spreadsheets, etc.) as a Favorite (the heart to the left of the listing turns bright red). Then

create a Bookmark for “My Favs”. Clicking on the bookmark displays all the marked documents.

How Do I Get the Columns I Want to Display?

This is a two-step process. First, you have to configure the columns you want and save that configuration. Second, you have to make that configuration your “Favorite” or associate it with a Bookmark. This process is dealt with in several topics under [“Customizing the Worldox Display”](#).

Can I Move Emails to Worldox from my Smartphone?

Yes. The Worldox Favorite Matters will display at the bottom of your folder list on your smartphone, just as they do in Outlook. You can move documents directly to Worldox.

In order for this to work properly, however, (1) Outlook has to be open on your desktop; (2) you have to have opened the matter at least once in Outlook and checked the “Don’t Show Again” button when moving or copying a document to Outlook; and (3) you must have created a Quick Profile to fill out the rest of the information in addition to the Client/Mater. Normally that included DocType (“Email”) and Author.

How do I copy an old document to use as the basis for a new one?

Most people have traditionally copied documents by opening the old document, doing a “Save As” and then making changes. Inevitably, however, we have all forgotten the “Save As” step, made changes and wiped out the old document. Worldox has a better way.

First highlight the document in the Worldox list. Then right-click the document. The first time you do this, go down to “Other File Commands” and select “Copy.” This brings up the Worldox profile screen. Change the description and Client/Matter information as desired (by default it will keep the original information). Click the “Copy” button. When done, you will be asked if you wish to open the copy. Say “Yes.” In essence, you are doing a “Save As” before the fact, which will eliminate a lot of errors. After the first time you go to the sub-menu, the “Copy” option will appear immediately when you right-click on a document.

Using Word’s Quick Access Toolbar

Word’s Quick Access Toolbar lets you put the common Word functions you use in one place. Therefore your eye and hand only have one place to go for almost anything you need. Right-click on the Quick Access Toolbar and select “Customize Quick Access Toolbar.” I normally add the following functions: New File, Open File, Save, Save As, Print, Exit, Show Recently Used Documents (from the Worldox Ribbon Bar). Worldox also adds some functions.

What Can I do with the Viewer?

The Viewer is your friend. If you keep it open you can inspect any document you click on in the Worldox display. If you do a text search, the Viewer will display the “hits” directly

and allow you to jump from one item to the next.

Perhaps most importantly, if you highlight and copy text from the viewer, you can paste it directly into the document you are working on. You no longer have to open up multiple documents and search in them to find language you want to incorporate into a new document.

Searching

How do I find a document?

There are a number of ways to search for a document.

- If your firm has implemented Bookmarks, simply click on one of them to initiate a search. This is frequently the most efficient way to do a complex search.
- If you already know the document number, simply type it in the Search field (the binoculars) at the top right of the file listing. You do not have to type leading zeros or the document type. If the document name is 00001234.doc, just type “1234.”
- Click the Favorite Matters tab and double click on the desired matter or doc type, if those are directories.
- If you click on the down arrow to the right of the Search field, you will see a list of your recent searches. Select one of them to repeat the search.
- Click on the Binoculars icon and select “Start a New Search.” Select the profile group you wish to search in, fill out the required information and start the search.

Can I search for documents from within Word?

Yes. Open the Worldox Ribbon. Search options will be on the left. You can do a combined description/text search; find the last 20 Word documents; find all documents with a profile identical to the one you are working on (obviously the document has to be saved for this to work); or all QuickSaved documents.

Can I combine different types of searches?

Yes. This is one of the most powerful features of Worldox.

You can enter information (including using wildcards and [boolean](#) operators) in any field of the search screen. If you enter information in more than one field, “AND” or “OR” buttons appear to the right of the field. Clicking on them toggles the option between “AND” and “OR.”

Some examples:

Client: 12345

Finds all documents for client 12345

NOT

In many cases, your emails will overwhelm the rest of your documents. So you could search for all the documents for a given matter but put "NOT Email" in the DocType field to exclude emails.

DocType: Pleading

Finds all pleadings. If a client is also filled in, finds all pleadings for that client.

Description/Comment: amputat

Finds any word beginning with those characters: amputate, amputated, amputation, etc. You will also see the words that exist in the index as you type.

Full text: liability w/10 damages

Finds any occurrence of the word "liability" within 10 words of the word "damages." Use quotes around a phrase to search for an exact match.

Can I just type in the client or matter name instead of the number?

Yes. On any save or search profile screen, simply start typing any numbers or letters in an ID or description. A list of options that contain the letters you type will appear. Click on one to select the desired item. Note that at the present time, when you do this for a matter on the search screen (but not the save screen), you see *all* the matters that satisfy the criteria, not just the matters for a given client.

Can I filter the results of a search?

Yes. With the first list of found documents on the screen, start a new search. Probably toward the bottom of the search screen there will be an item that says "Search What?" By default it will say "Active." Click the "Search What" button and select "Current List." Any search items you enter will be applied only to the list of documents on the screen. You can do this multiple times to further refine your search. Note, however, that this search is not using the index, so it may be fairly slow, depending on the size and number of documents on your original list.

In addition, if you simply start typing, (for example, "cons") Worldox will jump to the first occurrence of those letters in the Description field (but not including comments).

You can define multiple sorts within a given search by clicking on “Change Sort” and selecting the desired options.

Finally, you can filter the results by a number of criteria, by clicking the “Filters” button at the bottom of the screen. See next topic.

My search returns different types of documents - Word, Excel, PDF, Email, etc. How can I see only one type of document?

You can use “Filters” button at the bottom of the Worldox window. This is a function that has become very popular in blogs. When you click on the “Filter” it shows you the number of documents of each type that your search has found (*.doc, PDF, *.xls, etc.) displayed with the number of each type of document: the more documents the bigger the font size.

Alternatively, if you click on one of the search result icons just above the display list, you will have options to further narrow down the search.

Can I search for text in a document without opening it?

Absolutely. After highlighting the document you wish to search, click on the Viewer (the magnifying glass icon). When the viewer window pops up, search icons are available in the viewer window: A binoculars with “ABC” under it, and next and previous binocular icons. PDF’s must have been run through Optical Character Recognition (“OCR”) to be searchable.

Note that if you have located this document as a result of a full text search, the viewer window will show the “hits” that your search came up with.

Can I use Favorite Matters to search?

Yes. If you simply open your Favorite Matters tab at the left of the display screen and double-click on any Favorite Matter, all the files that belong to that listing will be displayed. Note that Favorite Matters only include fields that are directories.

How Do I see all my recent searches?

To see all the searches you have recently done, simply click the down arrow to the right of the “Search” button (the binoculars) at the just above the column headers toward the right of the screen. This will give you a list of all your recent searches.

My client list is very long. Is there an easy way to find a specific client?

For any field in a Worldox Profile screen, there are three ways to find information.

- 1) Just start typing either a client/matter number or part of a description in any field. Options including the characters you are typing pop up and you can choose the one you want.
- 2) Click on the button to the left of the field. This brings up the entire list. If you simply start typing, your search will go to the first instance found. Thus if you type “SMI...” the search will find “Smith.” Generally speaking, typing three or four letters is sufficient to find a client. Worldox has a “favorites” list for all profile fields. If you click on the “Favorites” tab for a client, it will show you the last 20 clients you have accessed. This can be made the default by right-clicking on the “Favorites” tab and selecting “Set as Default Tab.”
- 3) Click on the down arrow at the right of any given field. This will bring up the most recently used entries.

How can I prevent the multiple-choice search screen from popping up every time I start a search?

The best way to get around this problem is to create a number of search Bookmarks which can be accessed directly.

All of a sudden I can't find any documents. Why?

The two most likely reasons for this are:

- 1) If the Worldox icon in your system tray has a red “X” in it, or if there is a red “X” next to the Profile Group listing when you start a search, your PC has lost its connection with the network. Try rebooting the PC. If this fails, contact your system administrator.
- 2) If the search simply fails with an indication that the document could not be found, there is a good chance that the Indexer has stopped or hung. Ask your system administrator to check the Indexer.

I just saved a document and now a search for text in the document doesn't work.

By default, the profile index is updated every 15 seconds or so, but the full-text indexes are only updated at night due to the size of the indexes and the amount of time it takes to update them. Thus full text searching will only work the day *after* the document has been saved. However, some smaller firms choose to update the text index during the lunch hour, when the impact of doing so (text searches may not work properly when the index is being updated) is minimized.

Does Worldox support Boolean searches?

Yes, Worldox supports full Boolean searches. In a specific field (“Description” for example), you can:

- 1) Worldox uses word stemming by default. Thus “retain” will find “retainer,” “retain,” “retained,” “retaining,” etc. You do not need to include an asterisk.
- 2) Use “and,” “or,” “not.” (Alternate operators for these functions are: “&”, “|”, and “!”) Thus

“Bill” and “jan” (finds both “jan” and “January”)

“Bill” or “jan”

“Bill” NOT “jan”

Matter number with NOT email in DocType field

“Bill” w/10 “jan” (finds “bill” within 10 words of “January”). Use quotes around a phrase for an exact match.

- 3) If you fill in multiple different fields (e.g., something in “description” and a given client). When you do this “AND” buttons appear at the right of the profile screen. Clicking on these lets you toggle between AND and OR.

I prefer to use a Windows Explorer-type tree to locate documents. How do I do this?

Worldox has a Navigation Panel view that is more powerful than Windows Explorer. Click on “My Computer” or “Cabinets.” The tree will appear at the left. The tree view also lists the Client, Matter or Doc Type descriptions next to the client/matter numbers. The size of the window will expand to display all the information and resize when you click back on the main list window. Note that some firms disable the Tree View.

Email Issues

What Emails should I save into Worldox?

Emails frequently overwhelm people. It’s not unusual for a busy attorney to receive hundreds of emails a day. So a common question is: “What emails should I put into Worldox? It’s really a lot of work.”

Obviously this depends on workflow, firm policies and personal inclination. In my experience, however, the best answer to this question can be derived from the answer to two other questions:

1. Does the email represent a transaction you want to audit in relation to the

client/matter involved? If not, if the email is "meet you at noon for lunch", don't bother. If yes, if the email is substantive concerning the case, it should go into Worldox.

2. In a similar vein: If you are likely to be involved in document discovery/production, would this email have to be discovered/produced? If yes, it belongs in Worldox. If this policy is followed systematically, you have a big step up when faced with a document production issue.

If I email a document to a client and they return it, can I save it as a version of the original document?

If the client has not changed the name of the document, Worldox will automatically give you the option to save the file as a version of the original file.

If the client *has* changed the name of the file (which is very common), when you start to save the attachment, a profile screen appears. Click "Save as a Version" at the bottom of the screen. The Worldox list pops up. Find the document for which the current attachment is to be a new version. When you double-click on that document, a screen pops up with the profile information for the document. Select "Save as new version." Note that you cannot save a PDF as a version of a Word document.

What if I don't want to save an Email to Worldox?

If you don't want to save an outgoing Email to Worldox, there are several options.

1) If the Email is personal in nature (family members, friends, Professional or other associations, etc.), select "Add the address to my ignore list." This will disable the popup for all future Emails to that address.

2) If you simply don't want to save this particular Email (because it is trivial, irrelevant, etc), you can simply click "Ignore." However, be aware that there could conceivably be discovery issues (based on the new Federal Rules of Civil Procedure) if you randomly delete Emails.

Note: Your firm administrator may have limited the ability to cancel the save by passwording this function.

Can I disable the Email popup?

Yes (assuming you have adequate rights). If you wish to totally disable the popup completely, first click on the "Email" tab at the very left just above the file listing. Then select "Edit" then "Address Rules." Click the green "+" to add a rule. To disable everything, select both "All internal addresses" and "All external addresses." In the bottom section select "No, do not ask" for all categories (To, CC: etc). If you do not have

rights to do this, the option will not appear. Consult your Worldox Manager.

When I reply to an email my signature block does not appear. Can I fix this?

Yes, assuming you are using Outlook Exchange. Click on the “Email” button (your Outlook inbox will display). Click Edit | Signature at the top of the Worldox menu. Type in the signature you wish to have. This will display when emailing a document from Worldox, but not if you reply or forward an email from within Worldox. Note: you cannot include a graphic in this signature.

Drag & Drop Emails into Worldox

Your Favorite Matters now follow you into Worldox. You can simply drag and drop one or more emails on top of a given favorite matter to move them to Worldox. If you want to copy them, hold down the Ctrl key while dragging and dropping. You will see a confirmation screen making sure you have dragged it to the correct matter. If you wish to drag & drop emails to Worldox using your Smartphone in the future, be sure to click the “Don’t Show Again” box.

Can I save emails to Worldox from my Smartphone?

Yes. Your Favorite Matters will appear at the bottom of the list of folders in your Smartphone, just as it does in Outlook. You can move emails to your Favorite Matters. In order for the process to work seamlessly, Outlook currently has to be open on your desktop, and you will have to set up a default Quick Profile for saving emails to assign fields that are not folders (such as an “Email” doc type). In addition, you will have to save at least one email to a given Favorite Matter and click the “Don’t Show Again” box when the confirmation dialog pops up. If you do not do this, you could have a very large number of confirmation dialogs when you get back to the office.

Managing Your Documents

How can I import non-Worldox documents into Worldox?

By default, Worldox enables the “WorkZone,” which is a stylized Worldox logo that sits at the top middle of your screen (you can move it around if this is not a convenient location). If you do not see it, right-click on the Worldox globe in the system tray and select “Enable WorkZone.”

Using Windows Explorer, you can drag and drop any file onto the WorkZone and the Worldox profile screen will pop up. When you fill out the profile, the document is *copied* (not moved) into the Worldox document store. You can drag multiple files at one time, assuming they will all be profiled the same way (most firms have a limit of 10 documents at one time). In that case, the original name of the document appears in the “Description” field.

Alternatively, using Windows Explorer, select the document to be imported, right-click and select “Save to Worldox.” Fill out the profile and the document will be copied (not moved) to Worldox.

A more efficient way, however, is to click on “My Computer” in the Navigation Panel Tabs. Navigate through the tree folder to select the desired document and Move it to Worldox (right-click on the document and select Move, or click on the Edit/Move Profile button on the button bar). For example, if you scan documents to a specified directory, once you have navigated to that directory once, you can Bookmark that directory to facilitate processing the scanned documents.

Can I import large numbers of discovery or production documents into Worldox?

Yes, if your firm has enabled this functionality. From Windows Explorer, right-click on the directory you wish to import and select Save to Worldox. All the files must be saved into a single Client/Matter/Doc Type. However, each will be labeled with the origin and directory, e.g., “Copied from ‘e:\discovery\jones\bank statements\2015\ February 2015 statement’ on Mar 10 2015 02:45.56 PM’.” You will have an option to create a Project listing all the files that have been imported. As opposed to the Worldox function described above, this will import all sub-folders as well as a top-level folder and leave your original files (CD, etc.) intact.

How do I move a document or change the profile information?

The easiest way to do this in Worldox is to click on the “Move/Edit Profile” button in the top middle of the screen. Changing the Profile information may move the document from one place to another. If you are a keyboard person, hit Ctrl-E.

To change just the description, click on it once, pause, and click again (just like Windows Explorer). Change the description and click the green check mark to save it.

Can Worldox do document comparison (redlining)?

Worldox does not have a separate built-in document comparison feature, but it integrates with major redlining programs such as Workshare/DeltaView, CompareDocs and DiffDocs. It can also be used with the built-in redlining features of Word and WordPerfect. Note that you can compare different versions, e.g. version 7 to version 3.

What are “Projects” and “Workspaces” and how can I use them?

Projects (organized in Workspaces) are a form of supra-organization that let you group a number of documents together over and above normal Worldox Client/Matter/Doc Type categories. For example, a real estate firm might want to make a “Project” of the closing binder files. A litigation firm might want to group all the Exhibits for a trial. (Note that Adobe Acrobat has a similar function which it terms a “Portfolio.”)

To create a Project, click on the “Project” button at the bottom of the Worldox screen. Then select the desired files and drag and drop them to the “Project” area. Then click “Save As” at the right of the screen and fill out a profile normally. As a good practice, if you put “project” in the description, it will make them easier to find. You might consider adding a “Project” type to Document Types to make them easier to find. Click “Close” to close the Project screen.

Once the Project is created you can print out the listing to create a physical table of contents if you wish.

If you have Workspace enabled, you can also drag and drop files to the particular Projects in the Workspace or create a new Workspace. If you plan to make heavy use of Workspaces, you might want to create a separate Workspace Cabinet for ease of organization.

What are “Related Documents” and how can I use them?

The Related Documents feature lets you organize documents into “Parent” and “Child” groupings. To create related documents simply drag one or more secondary (“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 create “grandchild” documents by dragging a document on to an existing “Child” document. That document will then appear as both a “Child” and “Parent” document. Thus you could have a Table of Contents that is a “Parent” and all the documents referred to in the TOC would be “Children.”

You can 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. This makes identifying related documents much easier.

I want to take all the files for a particular client with me. How do I do this?

There are two main ways to do this. If you are using a laptop, you can select the files and use “Send To Local Mirror.” This will make all the files and their Worldox information available to you when you are running the laptop disconnected from the network.

The other common way to do this is to put the files on a USB key (flash drive). When you

plug a USB key into your PC, its drive letter appears on the “Send To” menu. Simply select the files you wish to take and “send” them to the USB key. This will send the files with the description and the file ID as the document name, but will not transfer Worldox profile information. You may want to create a “send to” that transfers at least the Client/Matter structure and possibly Doc Types as well.

I have some documents I use all the time. Can I find them immediately with one click?

There are several ways to do this.

- The most efficient way to do this is to manually mark those files as favorites (you will see a red heart at the left of the file listing). Then search for Favorite Files | Personal | Added. When they appear on your listing, create a bookmark for them.
- You can create a personal Category, assign it to the desired files, then search for the category and create a bookmark for it.
- For a lo-tech solution, you can put a code in the description, such as JHxxx. Then search for the code and create a bookmark for those files (right-click on the bookmark bar and select “Add This List.”).

Other

Can I print multiple documents at once?

Yes. If you select multiple documents on the file list (click on the little box to the left of the file description, a green check mark will appear), then right-click, select Send To, and Printer (to choose the printer) or Printer (Default) to print directly to the default printer. You can print up to 10 documents at one time.

Note that if you select File | Print List (or Ctrl-P), you can print the *list* of the documents on the screen. This can be useful, for example, to print all the Exhibits for a trial, or all the documents at a Real Estate closing. Combining this feature with different sets of columns gives a powerful reporting function. If the columns do not fit your paper, Worldox offers you options to make it fit (landscape, reducing the margins and font size).

What are Favorite Matters and how can I use them?

Favorite Matters represents a rotating list of all the matters you have worked on in the last 30 days (the time period is configurable). After 30 days of inactivity the matter is eliminated from the list. When you open or save a document it is automatically listed in Favorite Matters. You can also manually include a document in Favorite Matters by clicking on the heart at the left of the document listing (it will turn red). Manually created Favorite Matters are not subject to the 30-day time period. Favorite Matters largely replace Quick Profiles. Favorite Matters deal only with Profile fields that are directories (see below on differences between Favorite Matters and Quick Profiles).

What are Quick Profiles and how can I use them?

Quick Profiles help automate saving documents for frequently used matters. By creating a Quick Profile, instead of having to fill in the entire profile screen, you click on the desired Quick Profile on the Tab to the left of the main File Save As profile screen and all or parts of the profile are automatically filled in.

To create a Quick Profile, begin saving a document, then open the Quick Profile tab at the left of the screen and click on the Green “Add” button. Fill in the options you wish to include in the Quick Profile and click OK. Give the profile a name.

You can create a Quick Profile tree structure with sub-items (like sub-folders in Outlook). Lets say you have a Quick Profile for “Jones.” After changing the information you wish to enter in the Quick Profile, when you name the Quick Profile, call it, *e.g.*, “Jones\Correspondence.” “Correspondence” will appear as a sub-item under “Jones.”

What are the differences between Favorite Matters and Quick Profiles?

Favorite Matters are created automatically any time you save or open a document and follow you through various areas of the program (in Outlook, for example). Favorite Matters is a rotating list of everything you have worked on for the last 30 days. You can also designate a document as belonging to a “Favorite Matter” manually, in which case it stays on your list forever.

However, Favorite Matters list only those profile fields that are directories, so if a firm has additional fields, or if Doc Type and Author are not directories, they will not filled in when you use Favorite Matters. Using Favorite Matters, you can only do a search for the lowest level: *e.g.* in a Client/Matter structure for a given Matter, but not for the entire Client.

Quick Profiles allow you to pre-fill all or part of any profile screen, including non-directory information and description or comments fields. However, they must be created manually. So Quick Profiles offer greater flexibility, but require more work to set up.

If I delete a file by mistake, can I recover it?

Worldox has a Salvage Bin function (like the Recycle Bin on your desktop) that can let designated users recover documents (this right is generally restricted for security reasons). If it has been enabled, when you delete a document, you may see three options:

- Move to Salvage Bin
- Delete
- Shred (unrecoverable)

In many cases, “Move to Salvage Bin” is configured to be the only option. If the file is “moved to salvage bin,” it can be recovered by a Worldox administrator for a defined

period of time.

If a user with Salvage Bin rights turns on the Tree View (the next-to-right icon on the button bar, or Display | Folder View, or Ctrl-T), and click on the “Profile Groups” they will see the different Profile Groups. Under each Group there is an option for “Salvage Bin.” Clicking on this shows the files that can be retrieved if they have been deleted.

You can also search the Salvage Bin by clicking on the “Search What?” button on a search screen and selecting “Salvage Bin.”

What can I do with the Viewer?

The Viewer is one of the most versatile of Worldox functions and allows you to perform many operations without actually having to open a document. With the viewer open, you can:

- Scroll down (using the blue up/down arrows in the viewer) from document to document to see which one you want without having to open each document.
- Search the document (by clicking on the binoculars icon with “ABC” on it) and search each instance of a phrase.
- Copy and paste text from the viewer to be copied into an existing document you are working on.
- Print the document (note that the formatting for very complex documents may not reproduce exactly when printed from the viewer).
- If you have done a full-text search, hop to the next or previous hit (the binoculars with the right and left arrows).

How can I get the most out of Categories?

A frequent request is to be able to save a document under multiple matters. While this is not possible, Categories offers an equivalent functionality, since they can be created and assigned over and above doc types. In addition, multiple categories can be assigned to the same document. Litigators might create a number of production-related categories (privileged, needs redaction, question about privilege, First Amendment, etc.). Other users might have categories such as Draft, Final, Executed, Needs Review. If there are a number of files you want to be able to see immediately on a regular basis, you could assign them to a Personal category.

What is QuickSave and how can I use it?

QuickSave is a green square on your Word Quick Access Toolbar. When implemented, it allows a user to save a document to a predefined location in a single click. However,

there are a number of workflow issues that should be considered carefully. If an attorney implements QuickSave, then those documents will not turn up in a search for e.g., all files for a given matter. If an assistant moves the QuickSaved documents to the relevant matter, then the attorney will not be able to find them using QuickSave. This feature should be implemented only after some thought as to the workflow involved.

PDFs

Can Worldox create PDF documents?

The easiest way to do this is to select the “Make PDF from Doc” or “Make PDF A from Doc” option in the Worldox Ribbon bar in Word to create a PDF from the document on the screen.

Worldox works with Adobe Acrobat and most third-party vendors, including pdfDocs, pdfactory, ScanSoft, Abby’s PDF Converter, Nuance PDF, etc. to create PDF documents. This integration depends on which products are installed on your system. Available options are listed when you right-click on a file and select “Send To.” Note that while Send To does not work with Acrobat, you should be able to create PDFs from within Word. In addition, if you are a small firm (less than 26 users), you can use pdfDocs’ PDF client in the Workflow module. (See [Workflow](#)).

Save/Save As (Version Control)

How do I create different versions of a document?

Select File | Save As in your word processor. A dialog pops up asking what you want to do. One option is “Save as Version 99” where “99” stands for the next higher version number. You can have up to 256 versions.

When you find a document with versions, you can list the versions. Versions are best saved with slightly different names (or something in the comments field) so that they are easy to differentiate. When you locate a file with, say, 10 versions, Worldox tracks the versions so that the display is not cluttered up with different files. You can right-click and select “List Versions.” Double-clicking on a file with versions offers the option to open the latest version or list the versions.

Can I save a document or email to more than one location at the same time?

No. However, GX4 now lets you create a “Send To” functionality that lets you link a single document to multiple matters (see below).

Alternatively, once a document has been saved, you can copy it from one location to another. If at the bottom of the profile you click the option “Doc ID: Keep Same as Source,” the two documents will have the same name. Thus if the first document is 00012345.doc, the second one will also be 00012345.doc, although the profile information will be different. If you search for document 12345, both documents will come up.

Important: The two documents are completely independent. If you edit one, the other will not change. Therefore you should only use this procedure for documents you are absolutely certain will not be edited, such as emails or scans of incoming correspondence.

The Categories feature offers better options than having multiple identical documents.

Can I link a document or email to multiple matters?

Yes. Once you have saved a document, you can link it to multiple matters or doc types. You will first need to have your administrator create a “Send To” to do this. Once this is done, simply right-click on the file, select “Send To” and then “Worldox Link Multiple Files” (or whatever your firm has called it) and follow the prompts. There will be only one copy of the document, but if you search for documents in, say, a matter to which the original document has been linked, a reference to the document will appear and you can open it directly.

Can I save a document to a flash (USB) drive?

In Worldox the drive letter for the flash drive shows up automatically when the USB key is plugged in. Note that if you copy a file to a USB drive as opposed to checking it out, other people can still work on the file. If you wish to prevent others from modifying the file while you have it, you must check it out.

Can I save a document locally (outside Worldox) like iManage or NetDocuments do?

While it is possible to implement this feature, it is not recommended. Worldox maintains system integrity so that the firm can ensure that all documents are saved within the system. Saving locally provides a loophole that disrupts that integrity.

However, most implementations allow for a “personal” Profile Group or “Matter” which lets users save personal, non-business documents in an area where others do not have access to it, while maintaining system integrity.

Scanning

Will Worldox scan documents to PDF?

Worldox works with Adobe Acrobat and a number of third-party vendors, including pdfDocs, pdfactory, ScanSoft, PDF Converter, etc. to create PDF documents. This

integration depends on which products are installed on your system. Available options are listed when you right-click on a file and select “Send To.”

However, Worldox does not have a built in scanning capability. It depends on working with other products.

Worldox *will* convert existing documents to PDFs if you have relevant PDF software installed. Thus, to convert a Word document, select the document, right-click and select “Send To.” Then select the appropriate PDF options. Note that this does not work with Acrobat. You can also create PDFs starting from Word in Word 2010 and later.

Creating a Bookmark for Scanned Documents

Firms frequently scan documents to a given location on the server and then process them. Worldox makes the process of moving and profiling them much simpler.

First, create a Bookmark for the directory on the server to which files are scanned. You can do this by opening the Tree View and navigating to the appropriate directory. When the files in that directory display on the screen, right-click on the Bookmark area and select Add a Bookmark. Name the Bookmark, e.g. “Recent Scans.”

You will automatically display all these files when you click on the Bookmark. Open the browser (the magnifying glass symbol on the button bar) to view the document. Then click on the Move/Edit Profile icon on the button bar, fill out the profile and the document is stored in Worldox and deleted from the “scans” directory.

What Third-Party Options Are There For Scanning?

There are several common options for scanning.

- If you use desktop Fujitsu Scansnap scanners (the S1500 or its successors is a common model, as well as the fi series), they can be configured to integrate directly with Worldox at no additional cost. You put the paper into the Scansnap, push a button, and the Worldox profile screen pops up. Only one step instead of two. Some smaller versions of Canon scanners (the P215 for example) offer similar capability.
- Symphony Suite from trumpet, inc. (www.trumpetinc.com) lets you “reserve” the Worldox information by filling out a profile. You then put a bar-coded cover sheet on the document and scan. The document goes directly to Worldox. Symphony Suite also OCR’s PDFs in the background, saving considerable amount of time. You can also stack documents and scan a bunch at a time.
- Large multi-purpose scanners from Canon and other makers offer integration with Worldox at significant additional cost. Canon’s implementation makes a user’s Favorite Matters available on the copier.

Workflow

Does Worldox Have a Workflow Module?

Worldox has a Workflow module (at an additional charge). In addition to providing Workflow functionality (both broadcast and sequential), it has a Tasks module that lets you specify a given task (review a document, for example) for a specific date in Outlook, and a Notify module that lets a user be notified if work has been done on specific documents, a given matter, etc. In addition, for firms of 25 or fewer users, the module can include a document comparison module licensed from CompareDocs and a PDF editor that can take the place of Acrobat.

Does Worldox include a Portal for Client Access?

Worldox Connect (an additional charge) allows you to share documents with clients. It also provides a number of advanced document collaboration features, as well as secure email transmission, metadata scrubbing, and a secure personal DropBox equivalent.

Worldox also integrates with a number of portals, such as Citrix Sharefile; Legal Anywhere; and Workshare. In addition it can be integrated with cloud storage applications such as DropBox and Box.

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