



Fundamentals of WORLDGX³

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Saving and Profiling in Worldox

Chapter at a Glance

Profile Groups
Saving a New File
Type Down Feature
Favorites Tab for Profile Field Table Windows
Subsequent Saves treated as a Save As
Quick Profile
Make a Quick Profile the Default Profile Group

Profile Groups

You have several profiles to select from depending on what type of file you are saving. The following profile groups are available: **Files**, **HR**, and **Private**.

Saving a New File

After you have created a new file, save the document by clicking Save. The Worldox save screen will now open to your default profile. Enter all of the required profile fields, including the description, and click OK. The document will now be saved in Worldox and assigned a unique Document ID number.

Worldox GX3 - Microsoft Word 2007-2013 - File Save As

Relations menu Same profile as... Quick Profile menu

Description: [Text Box] ASD

Profile Group: Files

1. District [Dropdown] <- District is Required!

2. Category [Dropdown] <- Category is Required!

3. File [Dropdown] <- File is Required!

4. Doc Type [Dropdown] <- Doc Type is Required!

5. Author: WDXINDEXE [Dropdown] <- Author is not on file.

6. Ret-Dat [Dropdown]

7. Stamp: DOCID [Dropdown] Stamp DocID in footer

Comments: [Text Box]

Doc ID: [NewDoc]

Save As Format: Word Document (*.docx)

Unsecured. Security OK Cancel

Quick Profiles

- By Profile Group
 - Files
 - Private

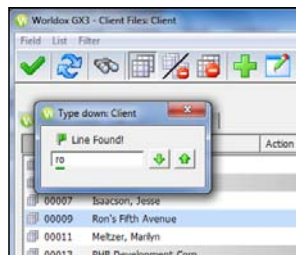
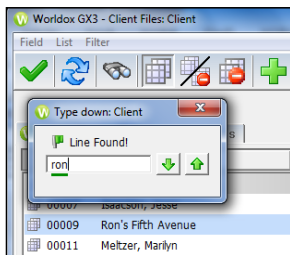
Profile Group: Files

Load Quick Profile Template

- Fill in the **Description** field with what you would like to name the document. This field can be up to 120 characters long.
- Use the **Comments** field to further describe the file. Enter keywords that could help you search for the document in the future. This field will hold up to 5,000 words and is text searchable with the Description of the document.

Type Down Feature

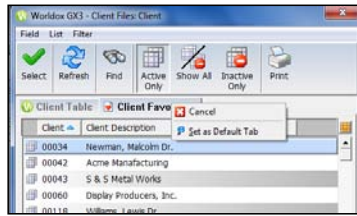
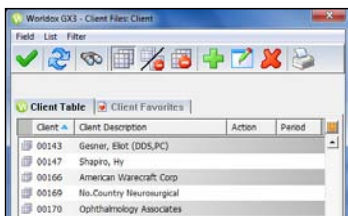
When saving a document, click the name of the field (for instance, Client) to see the table with all options available. To quickly search the table for the Client you're looking for, simply start typing the name or client number. You do not have to highlight the field you are attempting to search in. This feature will work for the other lists as well (Matter, Doc Type, Author, Doc Date).



Favorites Tab for Profile Field Table Windows

There are two tabs located on the profile field table windows. One is for the default profile fields and the other is the Favorites tab. The Favorites tab will track and display your recent choices for that selected field. This can make it easier to find the choices you make often.

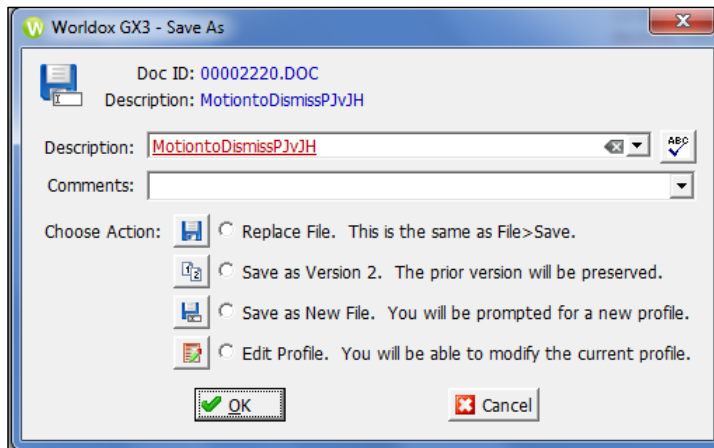
For example, when you click on the Client button you are presented with the Client profile field table as shown in the figure to the left.



Click on that Favorites tab and you will see all of the recent choices you have made for this field, shown in the figure to the right. Any choice you recently made will appear automatically on this Favorites tab. This Favorites tab appears for all of the other Profile field selection windows (such as Matter, Doc Type, Author, and Doc Date).

By right clicking on the Favorites tab, you can make your Favorites your default tab so when you access the table the next time, it will automatically display your favorites. You can add to your favorites by right clicking a client in the main tab and choosing **Add to Favorites**.

Save As



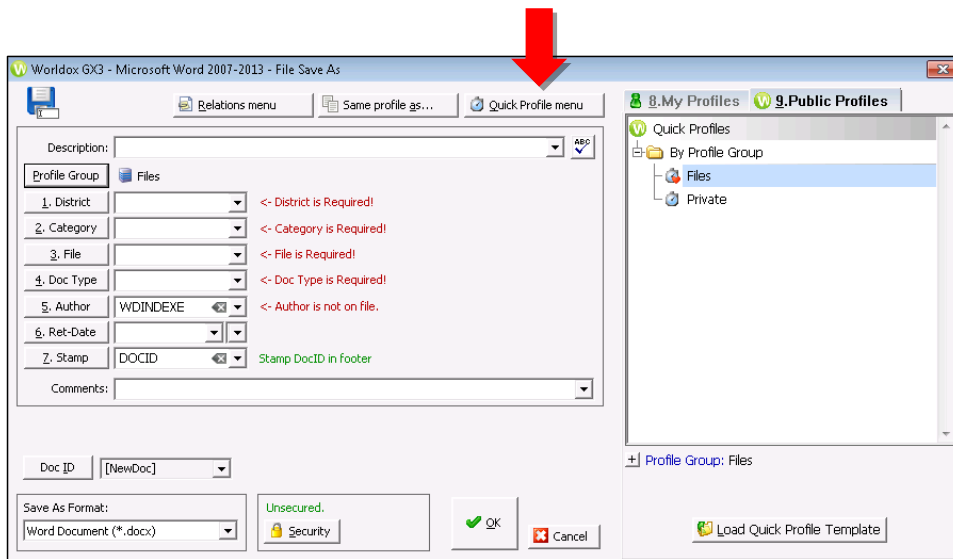
When you select **Save As**, you will have the following choices for saving the document:

- Selecting **Replace File** automatically overwrites the file you have open.
- When you want to save another draft of a file, select **Save as Version**. This will keep the same profile information but will change the version number.
- Choose **Save as New File** to create a copy of the file while preserving the original. This will assign the copy a new Doc ID, and allow you to change the profile information if necessary.
- Choose **Edit Profile** to modify the profile features of your current document.

Quick Profile

If you are going to be saving many documents with the same profile features, you can create a **Quick Profile** to save time. This will allow you to save the profile features you want to use and quickly apply them when saving new documents.

The **Quick Profile Menu** is located in the File Save screen along the top and slightly to the left.

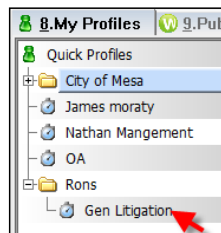


Creating a Quick Profile:

1. Choose to save your document, and fill out all the required fields in the profile window.
2. Click **Quick Profile Menu**.
3. Choose **Save As Quick Profile**.
4. Name your Quick Profile and click OK.

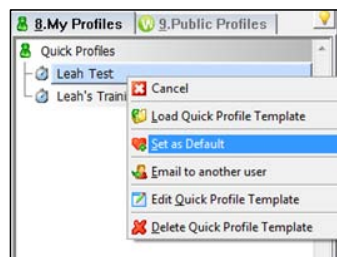
Using a Quick Profile:

1. Choose to save your document.
2. Select the **My Profiles** tab to the right on the profile window.
3. Select the profile you wish to use.
4. Profile information will be automatically inserted.
5. Enter a description or any desired comments.



Make a Quick Profile Your Default

1. Choose **Save** to open the profile window.
2. In the **My Profiles** tab, right click on the Quick Profile you want to use.
3. Choose **Set as Default**.
4. Now all documents you save will default to that Quick Profile. However, you will still be able to change the profile information if you need to.



Retrieving and Searching Files

Chapter at a Glance

- Opening a Document from Word**
- Using the WorkZone**
- Performing a Search**
- Text Searching**
- Boolean Search Operators**
- Viewing a File**
- Tags Filtering**
- Bottom Tabs**
- Quick File Retrieval**
- Location Line**
- Favorite Files**
- Bookmarks**
- Managing Bookmarks**

Searching in Worldox is an incredibly powerful, effective way to find information and locate documents in your firm's Worldox document repository. You can perform quick, simple searches, or advanced searches that combine full-text searching, date ranges, profile fields, and more.

There are several ways to search for documents in Worldox. You can open the program you know the document was created in (such as Word) and choose **Open**, or you can search by opening Worldox from the icon on your desktop or through the **WorkZone**.

Opening a document from Word

If you know your document is a Word document, open Word and choose **Open**. This will launch Worldox and you will be able to start your search. Worldox will open showing the most recent (or "Favorite") 20 Word documents that you have accessed.

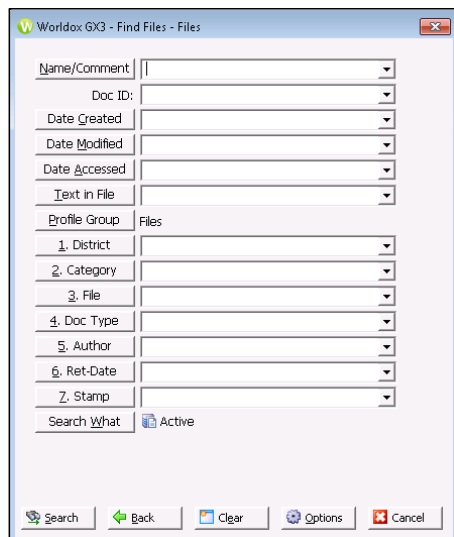
Using the WorkZone



When Worldox is running, a small icon called the **WorkZone** will appear near the top center of your desktop. You can double click this to open Worldox, or you can drag and drop files into the **WorkZone** to automatically open the profile save window. You can also move this icon around your screen by clicking and dragging it to where you want it.

Performing a Search

If your file is not in your **Favorites**, you can search multiple ways. The most powerful method of searching is by clicking Find (represented by binoculars) along the top of your Worldox screen. This will open a list of your **Profile Groups**. Select the Profile Group you wish to search in to open the search screen.



From here, you can search by any of the profile fields that you used to save the document, as well as several other fields. See the list below for a description of the search fields available.

- **Name/Comment** - The Name is the **Description** you assigned the file. Worldox searches for any files containing the text entered in either the **Name** or **Comments**.
- **Doc ID** - Each file is assigned a unique **Doc ID**. If you have the Doc ID number, you can enter it into this field (with or without leading zeros) to immediately find that document.
- **Date Created** -- The **Date Created** when the document was saved for the first time.
- **Date Modified** -- The **Date modified** is when the file was last saved by its native application.
- **Date Accessed** - The **Date Accessed** is the last date the file was opened.
- **Text in file** -- This is where you enter words for full-text searching of your documents. Worldox has a fast, powerful text search engine that uses Internet-style syntax so you can search your own documents similarly to how you search the Web. Please refer to the examples in **Text Searching in Worldox** section in this chapter.

Text Searching in Worldox

This following method of searching applies both to searches in the **Name/Comments** field and in **Text in File** (full-text searching).

For basic text searching, just enter words or search terms, separated by spaces, in the Text in File line of the Find window. For example, breach contract. For more examples, see Sample Searches table on the next page.

By default, Worldox will assume a w/3 (within three words of each other) if two words are entered in either the Name/Comments field or the Text in File. For a document to qualify, it must contain both words.

- **Capitalization** – Worldox searches are not case sensitive. For example, the following are equivalent: President, PRESIDENT and pReSidEnT.
- **Punctuation** – Punctuation is significant in searches. For example, searching for ASPCA will not find documents containing “A.S.P.C.A.” To find such a term, you must enter the periods between the letters: A.S.P.C.A..
- **Automatic Exclusion of Common Words** – Worldox ignores common words, such as “the” and “how,” as well as certain single digits and single letters. Such words tend to slow down your search as they are found in most documents. Alternatively, you can specify directly on the Text in File line to include common words by preceding them with a “+”, as described in the following section. A third alternative is to enclose the terms in quotation marks to search for the entire phrase.
- **“+” Searches** – If a common word is essential to what you are searching for, you can force its inclusion by placing the “+” sign in front of it. In the search, his current position, Worldox ignores the common word “his”. This means you might get a document with “her position is current” or “the current position is untenable.” To include “his” in the search, and therefore exclude the extraneous hits, enter +his current position.
- **“AND” Searches** – Worldox supports the logical AND operator. Joining terms with AND results in any documents that have all of the words, irrespective of how far apart each term occurs. For example, searching for breach AND contract returns any document that has both terms.
- **“OR” Searches** – Worldox supports the logical OR operator. Joining terms with OR results in any documents that have any one or more of the words.
- **NOT Searches** – Narrows your search and retrieve records that do not contain the term following it. For example: truck NOT pickup will find all instances where truck is present but will exclude any files that also include the word pickup in the file.

- **Word Variations (Stemming)** – Worldox text searching supports the use of the wildcard character “*” for word stemming. Use the asterisk when you want to search for variations of a term. You can use this anywhere in the word.
- **Phrase Searches** – Search for complete, literal phrases by enclosing the words in quotation marks. Words enclosed in quotation marks “like this” must appear together in all results, exactly as entered. Phrase searches are especially useful when looking for company names, direct quotes and proper names.
- **Proximity Searches** – Proximity searching allows you to combine search terms by specifying the maximum number of words you want between the terms. Worldox offers two types of proximity searches.
 - **“W/x” Proximity Searches** – Use the “W/x” operator, where x is the maximum number of words of separation allowed. For example, searching for elevator w/5 lawsuit locates documents where the terms “elevator” and “lawsuit” occur within five words of one another. Note that the order in which the words occur is not significant—only their relative position (proximity) to one another matters.
 - **“/x, y/” Ranged Proximity Searches** – This allows for a unidirectional search, from left to right, within the range of words specified by x and y. For example TECH /3,9/ CALL would search for "CALL" within three to nine words of "TECH", where "CALL" must appear to the right of "TECH". Note that there can be no spaces between the opening and closing slashes.

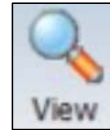
Boolean Search Operator Examples

If you want to narrow a search, you can add in Boolean search operators. See the table below which highlights Worldox's powerful full-text searching.

Text Search Example	Description
motion to compel	Finds documents where the word "motion" and the word "compel" are both found. Since "to" is a common word, it is ignored.
order cease desist	Finds documents where the word "order", "cease" and "desist" all occurs within a document. This is the same as: order AND cease AND desist.
"order to cease and desist"	Finds documents that include the exact phrase "order to cease and desist" only. To find an exact phrase, enclose it in quotation marks.
1992 AND gonzalez AND pleading	Finds documents with the terms "1992," "gonzalez" and "pleading." All three terms must appear. This differs from searching for 1992 gonzalez pleading in that the terms do not have to occur within three words of one another.
wor*	Finds documents beginning with the letters "wor." This would find, for example, documents with such words as "Worldox", "worldwide", "workshop" and "worship".
*duction	Finds documents ending with the letters "*duction". This would find, for example, documents with such words as "production", "introduction", and "reduction".
truck NOT pickup	Finds all instances where truck is present but not pickup.
hospital w/10 jalapeno	Finds documents where the word "jalapeno" occurs within 10 words of "hospital." For example, "She was taken to the hospital after eating a particularly hot jalapeno."
truck OR lorry	Finds documents with either the first word, the second word or both words. In this example, the term "lorry" is a synonym for "truck," so including it in the search, joined with OR, ensures that you'll find documents using either term.
hot /2,4/ dog	Finds documents where the word "hot" occurs prior to, and between two and four words of "dog." For example, "It was so hot the dog ran beneath the sprinkler." Something like the following would not qualify: "He entered the hot dog eating contest."

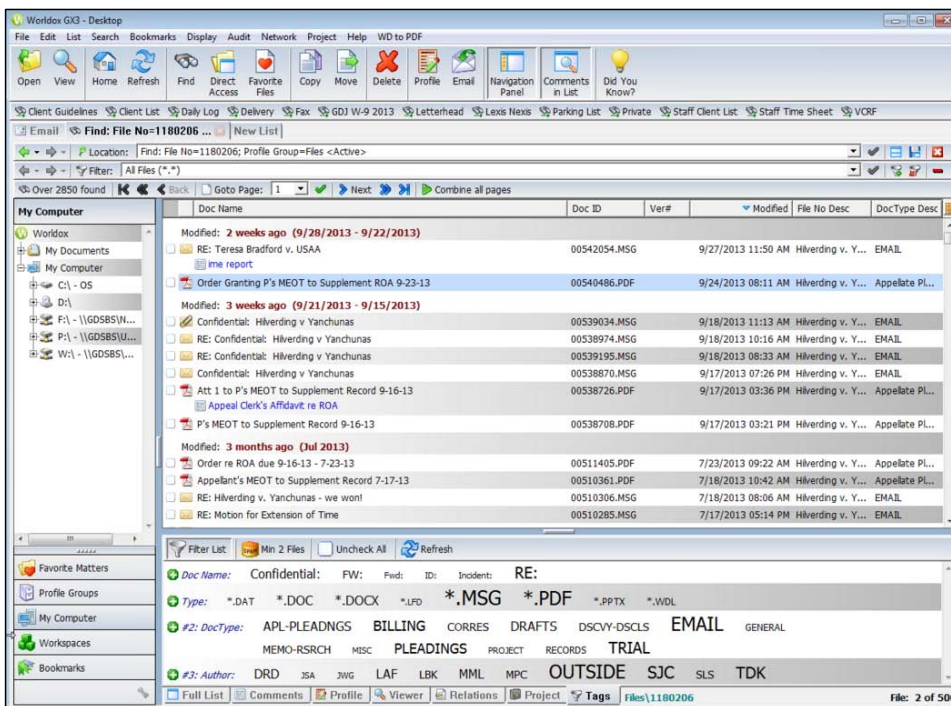
Viewing a File

After you have performed a search, you will be presented with a list of files that have met your search criteria. If you want to preview a file in the viewer before opening it, select the file in the Wordbox window and click the **View** button. Or you can select File>View.



Tags – The Visual Filter

Tags filters in Wordbox is a visual way to see the distribution of profile field values and other elements within work lists, along with a set of graphic tools for setting work list filters. To use Tags, choose the Tags tab along the bottom of the Wordbox screen.



What can you do with Tags?:

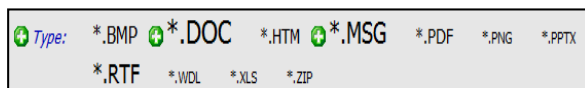
- Visual “weighting” means that types of files with that profile will appear larger and bolder than others. In this picture, you see that the current list has more .PDF and .MSG files than other file types.
- The ability to filter by including or excluding items by checking the icon to the left of each category, making it either a green “plus” sign or a red “negative” sign.

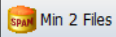
- The ability to set multiple filters, (i.e., set all filters before re-filtering, refreshing the list)
- A symbol appears to the left of each filter category:
 - = Include
 - = Exclude
- Rolling the mouse cursor over any item displays a checkbox next to that item, and a highlighted message detailing how many times this item appears in the work list:

You can set any number of filters in this window by clicking on those items checkboxes:



You can click that left-side category symbol to toggle between include and exclude. Clicking the type category symbol above switches the filter to exclude by those elements.



The  button is another useful tool. Click this to not display any items that only appear once on the visible work list files. This can make it much easier to use Tags filters on larger lists.

Bottom Tabs



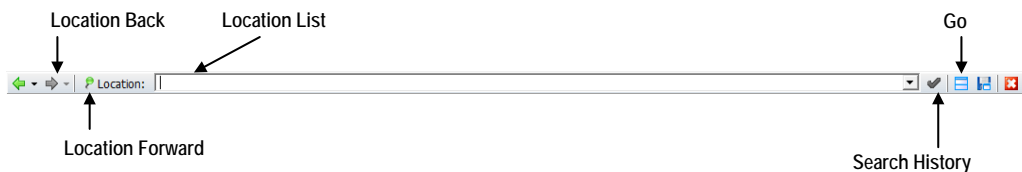
- **Full List** fills the window with the worklist.
- **Comments** displays and allows you to add, edit or delete the comments for the highlighted file.
- **Profile** displays and allows you to edit the profile for the highlighted file.
- **Viewer** displays the highlighted file in a preview window.
- **Relations** displays files related to the highlighted file.
- **Project** displays the projects window.
- **Tags** Displays the results in a visual filter format.

Quick File Retrieval

There are a number of ways to quickly access files you have recently opened, searches you have recently executed, and folders that you have recently accessed.

The **Location Line**, and **Favorite Files** button are the most commonly used features to access files.

The Location Line

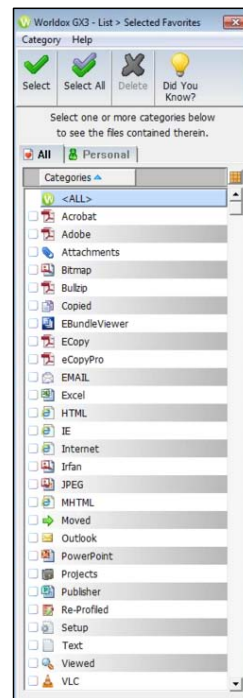


You can enter the **Doc ID** or **Name/Comments** of a file you want to find directly in the **Location Line** field, then press **Enter** or click on the **Go** button.

You can also access a history of your recent searches by clicking on the drop down arrow to the right of the **Location Line** field or click on the **Location** button. From there select the search or folder that you have recently accessed.

Favorite Files List Button

Click on the **Favorite Files List** button to display the **Worldox Work List** window. From this window, double click on the **file type** (e.g., Word, WordPerfect) or Worldox Action (e.g., Moved, Copied) to display up to the last 20 files of that type that you have accessed. You can also click on the <ALL> to display last 20 of all the types listed.

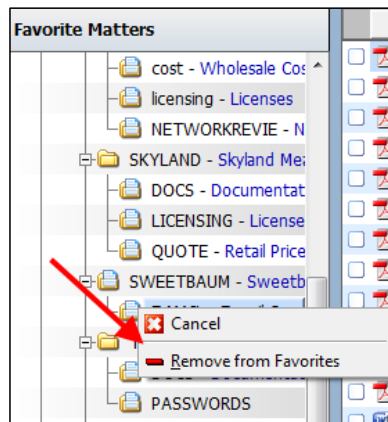


Favorite Matters

You can view a list of the folders of your favorite files from the view buttons to the left of your Worklist. This is similar to the Worldox Favorite Files feature except folders are tracked instead of files.

You can remove entire Profile Groups and also folders that appear in the Favorite Matters pane.

1. Right-click the folder or group you want to remove and click **Remove from Favorites**.
2. Once a folder or group has been removed the structure will be need to be re-accessed to add them back to Favorite Matters. Folders or groups will also be removed for the Favorite Files listing if you remove them here.

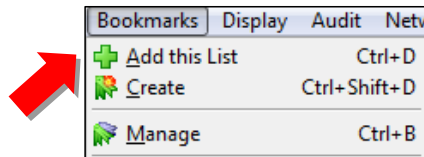


Bookmarks

Bookmarks allow you to save frequently used searches for future use. You can either save the Bookmark on the **Button Bar** by pinning the Bookmark or you can uncheck the **Pin to button bar** checkbox and the bookmark will be located in the Bookmarks drop down menu.

To Create a Bookmark:

- 1) Do the search you wish to bookmark
- 2) Click Bookmarks in the title bar
- 3) Select Add this list

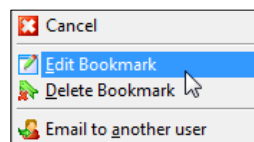


- 4) Name the Bookmark
- 5) Decide where you want it to show
On the Button Bar or in the drop down menu.
- 6) Click Save

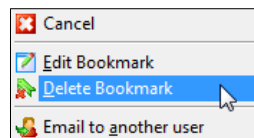


Managing Bookmarks

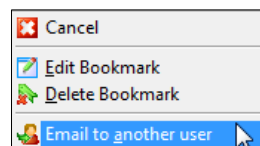
- To Edit a bookmark Right Click on the Bookmark > Select Edit Bookmark>make changes>Click OK.



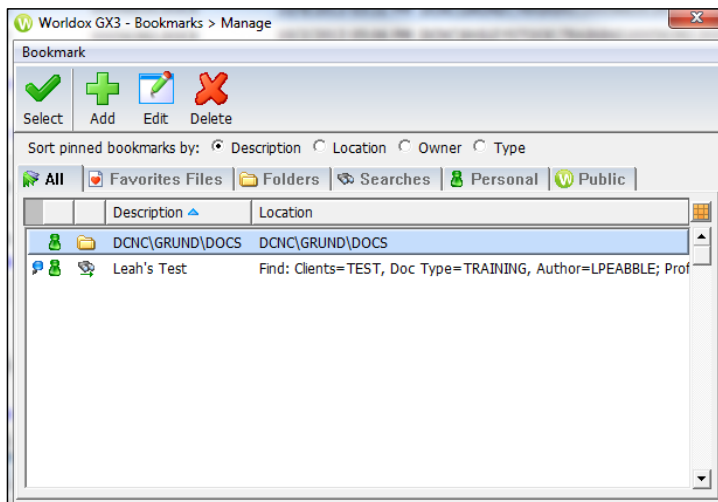
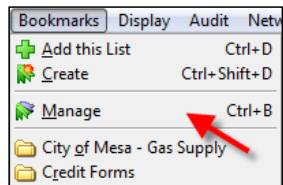
- To Delete a Bookmark Right Click on the Bookmark> Select Delete Bookmark>Click OK.



- To Email a Bookmark to another user Right Click on the Bookmark>Select Email to another user>Fill out the Email and send as usual.



- You can also edit Bookmarks by selecting Manage from the Bookmarks menu. In Manage screen, use the functions along the top of the screen to Add, Edit, or Delete Bookmarks.



Email Management

Chapter at a Glance

Attaching a File to Email from the Worldox WorkList

Attaching a File to an Email using Outlook

Profiling Sent Emails

Profiling an Email from Outlook

Profiling Email Attachments from Outlook

Saving an Incoming Email Attachment as a Version

Saving with Same Profile As

Quick Email Profiling

Managing your Quick Profile Folders

You can email files directly from the Worldox screen without having to go into your email application. However, you can still email attachments from within your email application by selecting **Insert>File** in the **New Mail Message Form** window.

You can create, view, forward, and reply to email directly from Worldox. Outlook users can profile email messages and attachments directly from Outlook into Worldox.

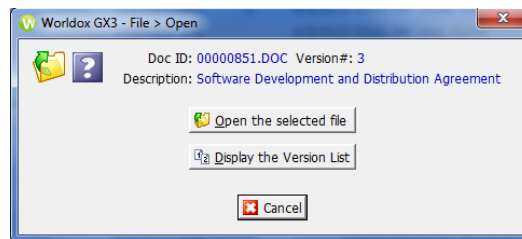
You can view your Inbox directly from Worldox. You can send email, and also profile email messages and attachments.

Attaching a file to Email from the WorkList

Using the **WorkList**, you can select from three different methods to insert a file into an email message.

Sending to someone in your firm:

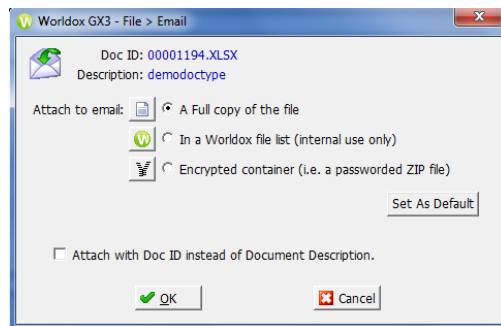
The **Worldox file list** feature can only be used internally. When the recipient clicks on the link in the Email, it will take them to the **Worldox File Open** screen with the file highlighted.



Sending to someone outside your firm:

Use the **Full Copy** feature for external emails. This sends a copy of the entire file. To open the attachment, users outside of the office will open attachments as they normally do. Worldox will automatically apply the standard file extension for the file type. This method will send the most recent version of a multi version file.

Use **Compressed** to zip large files sent to external users. You also have the option of adding a password.



Attaching a file to an Email using Outlook

Address your Outlook email as usual. When clicking on the **Insert file** button or the **File** option on the **Insert** menu, a Worldox window will display. Find and double-click on the file you wish to attach. If the file has versions, you will be presented with a Worldox Open window asking if you want to open the most recent version or display a list of all of the versions. You will then be presented with the same three choices as shown above.

Profiling Sent Emails (This automatic pop-up has been disabled)

When sending Email from Outlook you will have a **Worldox Sent Message** window automatically pop-up after clicking on the **Send** command in Outlook. This message is disabled for all Internal Recipients. The Worldox administrator can also disable this message for specific domains and individual email addresses. You can also control this on the individual workstations. If you have previously profiled an email from the recipient and you decide to copy or move the sent message to Worldox, the **Smart Profile** feature will provide a pre-populated profile. You can at that time change any of the fields. If you have never profiled an email for the recipient you will need to fill in all required profile fields. If you don't want to be prompted to profile an email to a specific address you can click on **Add this address to my ignore list**. If you don't want to profile the email just this time click the **Ignore** button and the next time you send an email to that address it will still ask you to profile it into Worldox.



Profiling an Email from Outlook

To copy or move an email from your inbox into Worldox:

- 1) Highlight the message you wish to copy/move.
- 2) Click on the Worldox Tab. Click on the Copy or Move to Worldox – this will bring up your profile window.
- 3) Fill out the profile window as normal.



Messages profiled by this method are saved in a standard message format (.msg) recognized by most email client programs. You will be prompted to complete the profile information.

Profiling Email Attachments from Outlook

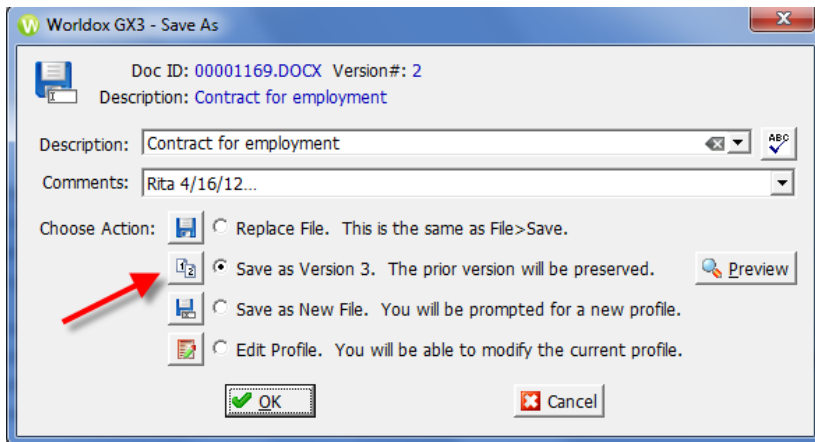
Attachments to an email message are included when the original message is profiled to Worldox using any method. The attachments are saved along with the original message, and they can be viewed later when the message is opened.

Attachments saved as part of a message are text searchable through Worldox. Attachments can also be saved separately from the email that they were attached to so that you can find them independently of the email. Or sometimes the email is not important and you only want the attachment in Worldox. To do this you right click on the attachment then click Save As and the profile window will open for you to profile the document.

If you save the attachments as a separate document after you have copied or moved them to Worldox, the attachments are automatically related to the original email.

Saving an Incoming Email Attachment as a Version

We often send files to external email recipients for their revisions. When they email the file back to us it can be desirable to save the file as a different version of the original file. As long as the recipient does not change the file name you can easily create a different version of the file by dragging the file to the [WorkZone](#), or by right clicking attachment and clicking save as. Worldox recognizes the document ID and will allow you to replace the original file, save as a different version, save as a new file or edit the profile.

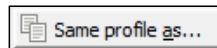


This would be the scenario in a perfect world! However, most of the time, the recipient changes the name of the document and when we receive it, saving it as a new version becomes a bigger challenge. In this situation use the same profile as feature shown in the next section.

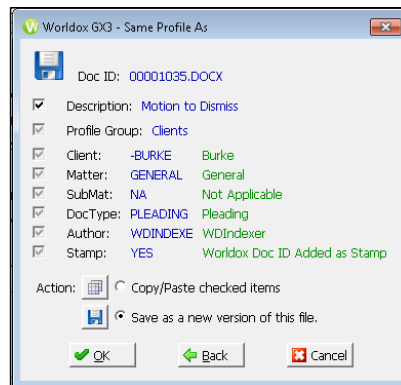
Using Same Profile As

When you receive a file attachment that needs to be a new version of an existing document but the sender has changed the name of the document, Worldox does not automatically recognize it as an existing internal document.

The **Same profile as** option is the easiest and best method to use.



1. In Outlook, right-click on the attached file and select Save As. The Worldox Save Attachment window will be displayed.
2. Click on the **Same profile as...** button
3. Search for and display the original document (or a document you wish to attach a new version).
4. Double-click to select the document. The following screen will be displayed.
5. Select **Save as new version of this file**. The file is now the next version of the original document.

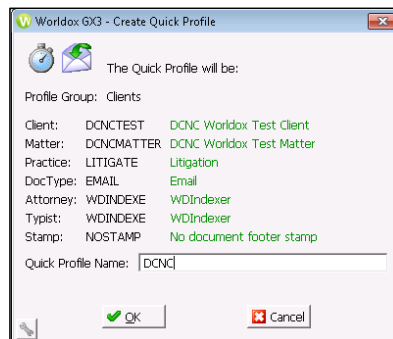


You do not have the opportunity during this process to change the file name or add additional comments. However, you can easily find the document version in your Worldox window and modify any of the profile fields as desired.

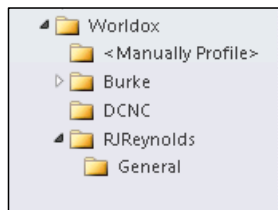
Quick Email Profiling

Create Quick Profiles as Worldox Folders in the Outlook tree

Worldox has folder based drag and drop email profiling for Microsoft Outlook users. To create a Worldox folder within the Outlook folder list (**Quick Profile**), select an email message and select **Move to Worldox** button. After filling out the profile fields, Worldox will give you the opportunity to create a Quick Profile folder in Outlook. Select **Yes** when prompted and confirm the information for the fields and then name the Quick Profile (Folder) and select OK.

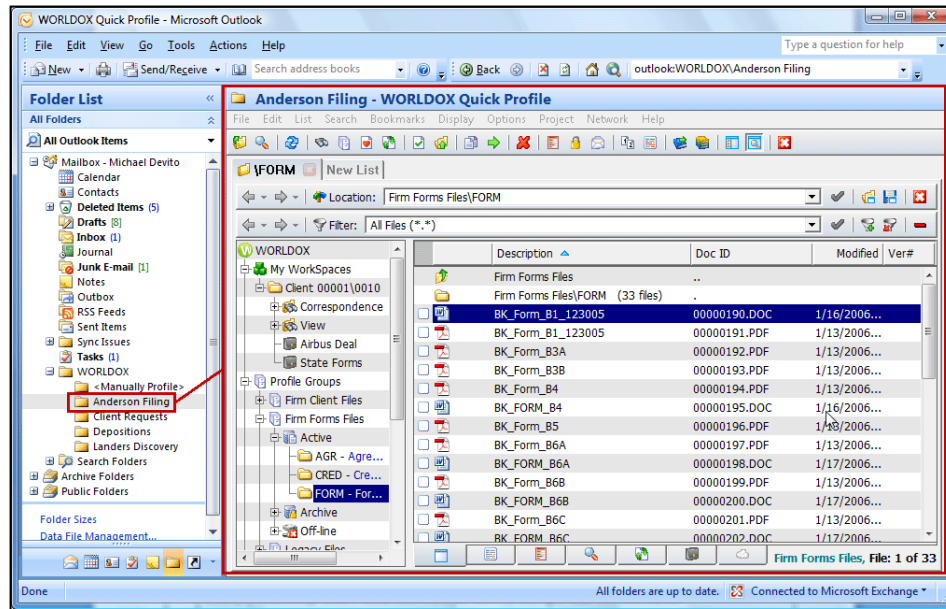


You will have a sub folder under Worldox in your Outlook folder list. If you want to create subfolders below that simply use a backslash \ after the folder name as shown below.



Once you have your **Quick Profiles** created, you can drag and drop one or more email messages from your inbox to the Worldox folder and Worldox fully profiles the messages and moves them to Worldox. We recommend that you profile no more than 75 emails in one save.

If you want to stay in Outlook and work with Worldox you don't need to toggle between the two applications. Outlook is instructed to provide drop folders to display Worldox within Outlook, so that it displays in the right-side frame of the Outlook window. The result is a seamless interface – two applications displayed in one application window.

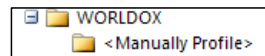


Even though you are working with Worldox GX³ in that right-side frame, you are still in Outlook. Just click back on any message category in the left-side path tree, and you are once again looking at Outlook content.

Manually Profile Folder

Under the Worldox GX² folder in the Outlook tree, you will notice a folder called **<Manually Profile>**. This folder catches e-mails that were part of a failed attempt to profile into Worldox. In the event of a cancelled or failed email profiling attempt the following message will be displayed.

When you see this message please click on the **<Manually Profile>** folder to find and complete the processing of the e-mail.

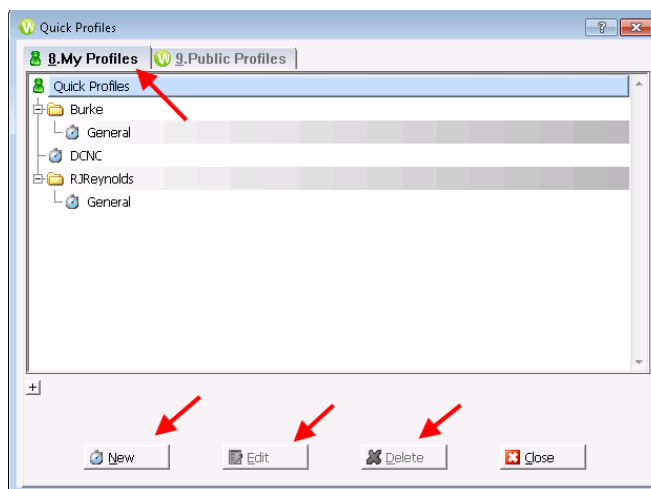
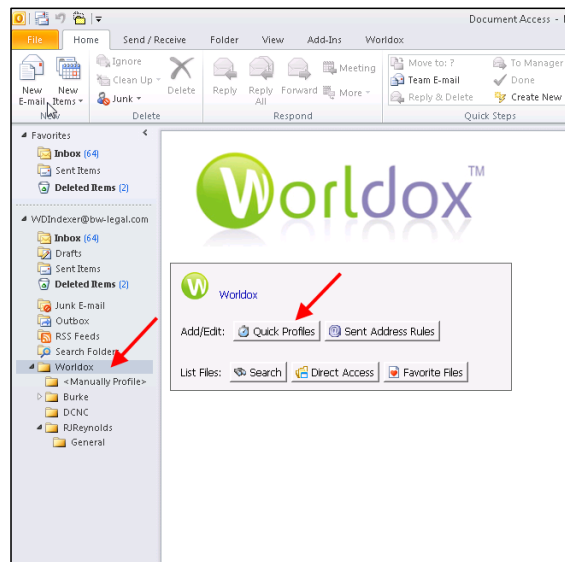


Managing your Quick Profile Folders

Create Worldox folders without having to move an email.

- 1) Select the **Worldox** folder in your Outlook tree.
- 2) Select **Quick Profiles** button in the message window.
- 3) Select **My Profiles** button.
- 4) Select the **New** Button.
- 5) Fill out the required fields.
- 6) Name the Quick Profile>Click OK

You will go to this location to delete old quick profile drag and drop folders.

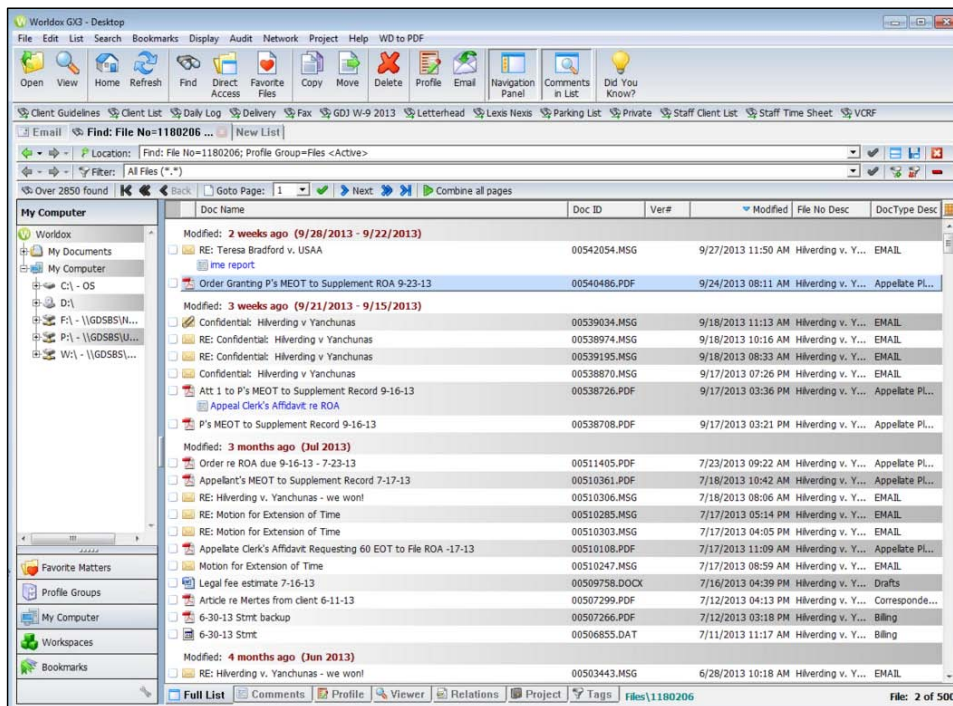


Working with Existing Files

Chapter at a Glance

Quick Menu

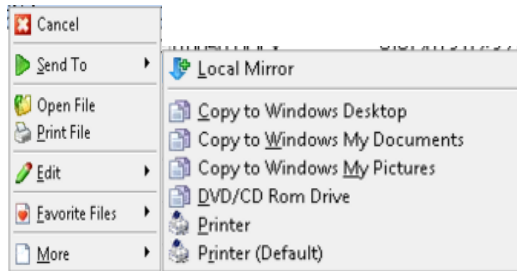
The Worldox Main window and the Worldox Word File Open window are where many of our everyday tasks will be performed. Copying, moving, previewing, searching, and emailing files are examples of some of the tasks we may need to perform.






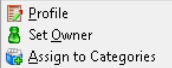
This main window will often be our "headquarters" and we will want to customize this window to meet our specific needs. In this chapter we will examine the basic features of the Worldox main window, and in the next chapter we will learn how to customize the window.

Quick Menu

Many functions can be performed by selecting the file and accessing the **Quick Menu**. Open the Quick Menu by right clicking on any document in the Work List in Worldox.



Cancel	This closes the Quick Menu	
Send To	This opens up the Secondary Menu	
	Local Mirror	This option copies the file to the local mirror on your hard drive. (available off-line)
	F:\	If you have a thumb drive inserted into your computer it will show up with the Windows assigned drive letter here.
	Copy to Windows Desktop	This option copies the file or files to the user's Desktop
	Copy to Windows My Documents	This option copies the file or files to the user's My documents folder
	Copy to Windows My Pictures	This option copies the file or files to the user's My pictures folder
	DVD/CD Rom Drive	This option copies the file or files to the folder within Windows that allows you to write them to a DVD/CD.
	Printer	This option opens a window for you to select the printer and print the file or files.
	Printer (Default)	This option prints the file or files to your default printer.
Edit	This opens up a sub-menu with options for copying the selected files path to the Clipboard.	
Favorite Files	This opens up options to add or remove the file or files from selected favorite files.	

More	This opens up a secondary Menu – This is dynamic – as you use these features they will show in the main Quick Menu.	
	Open With	This opens a window that allows you to open the file with a different application.
	View File	This opens the file in the Worldox Viewer.
	List Versions	This opens a new tab with a list of versions
	Make New Version	This saves the document as the next version.
	Check-Out	This checks the file out to be worked on off-line.
	Check-In	This checks files back into Worldox.
	Copy	This allows you to copy the selected file or files to another profile group.
	Move	This allows you to move the selected file or files to another profile group.
	Delete	This opens up a window and allows you to move the selected file to the salvage bin.
	Security	You will only see this if you have rights to add security to a document
	Email	This attaches the highlighted file or files to a blank email.
	Open File Location	This opens the file location on the server.
	Edit 	This allows you to edit the profile of the file or files selected, set the owner of the file or files and also assign to categories.
	Audit	This shows you who created the file and everyone who has modified, copied or moved this file.

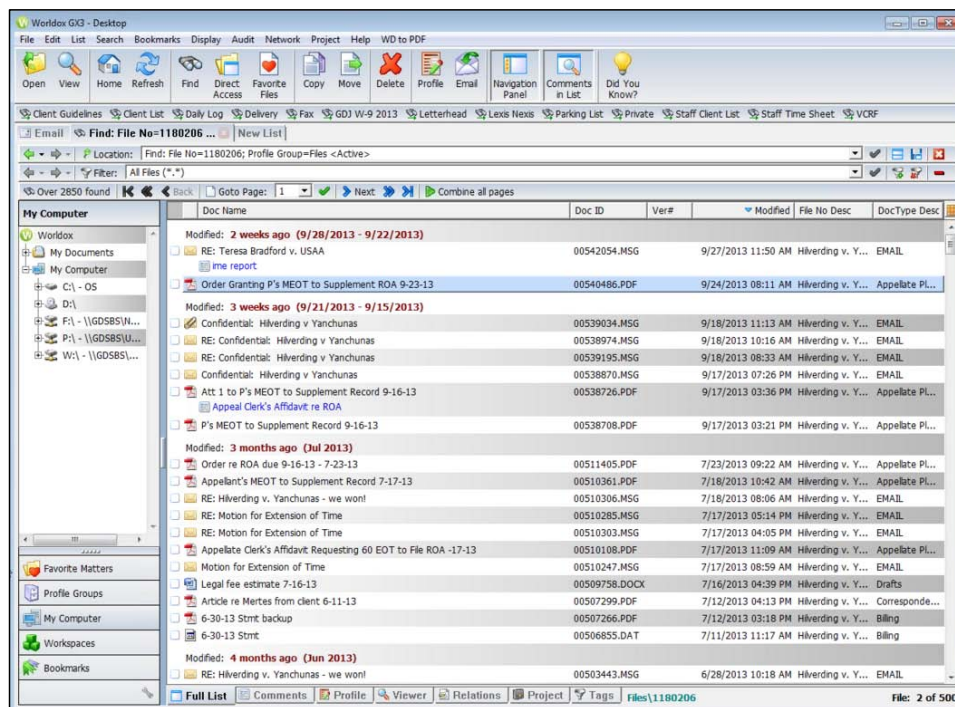
The Worldox Environment

Chapter at a Glance

The Worldox Window
Customizing the Window
Change Sort
Date Grouping
Window Style Features

Your Worldox Window

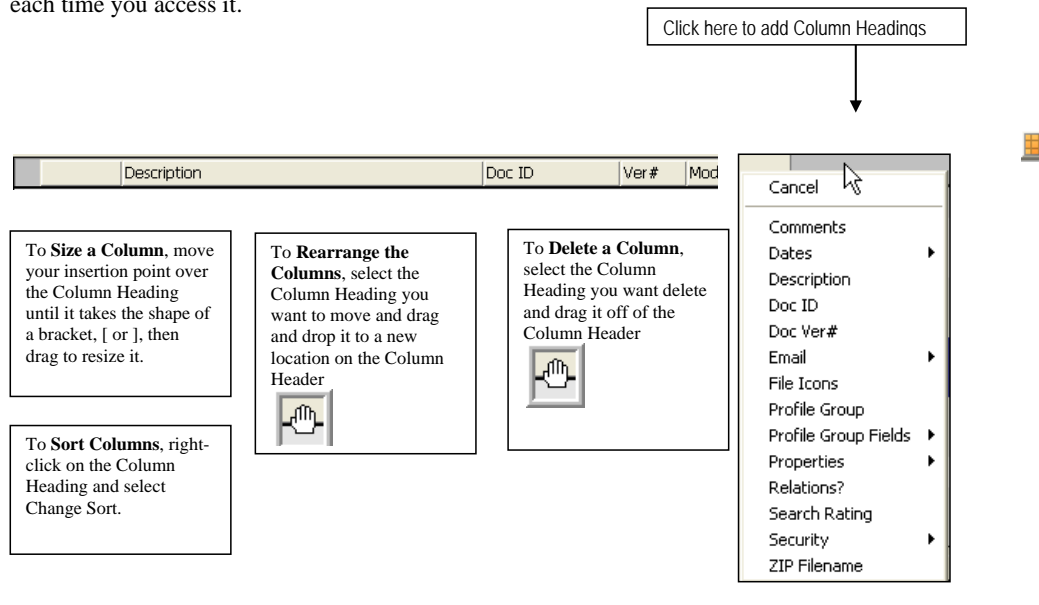
Your Worldox window will look something like the following window:



Customizing the Window

Worldox windows can be customized for each Open window in every application that you use. Column headers can be added, removed or moved to different locations and they can be sorted as well. Once you have customized your window you can save the style so it will look the same each time you access it.

Click here to add Column Headings



To **Size a Column**, move your insertion point over the Column Heading until it takes the shape of a bracket, [or], then drag to resize it.

To **Sort Columns**, right-click on the Column Heading and select Change Sort.

To **Rearrange the Columns**, select the Column Heading you want to move and drag and drop it to a new location on the Column Header

To **Delete a Column**, select the Column Heading you want delete and drag it off of the Column Header

This is the **Best Fit** button. By clicking this button it will modify the columns for the best fit.

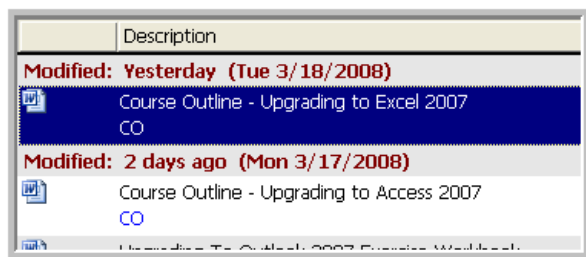
Select the field or fields you want to appear as a Column Heading

If you want to add a field from a specific **Profile Group**, make sure that you have displayed a search result based on that Profile. If you are displaying Favorites you will not see any Profile Group Fields and will display **None**.

Change Sort

You can easily change the sort of a column heading by clicking on the column heading. The first time you click on the heading it will change to Ascending sort and the second time you click on the heading it will change to a Descending sort. The little blue arrow shows which column is being used for the sort and which direction it is sorting. ▼

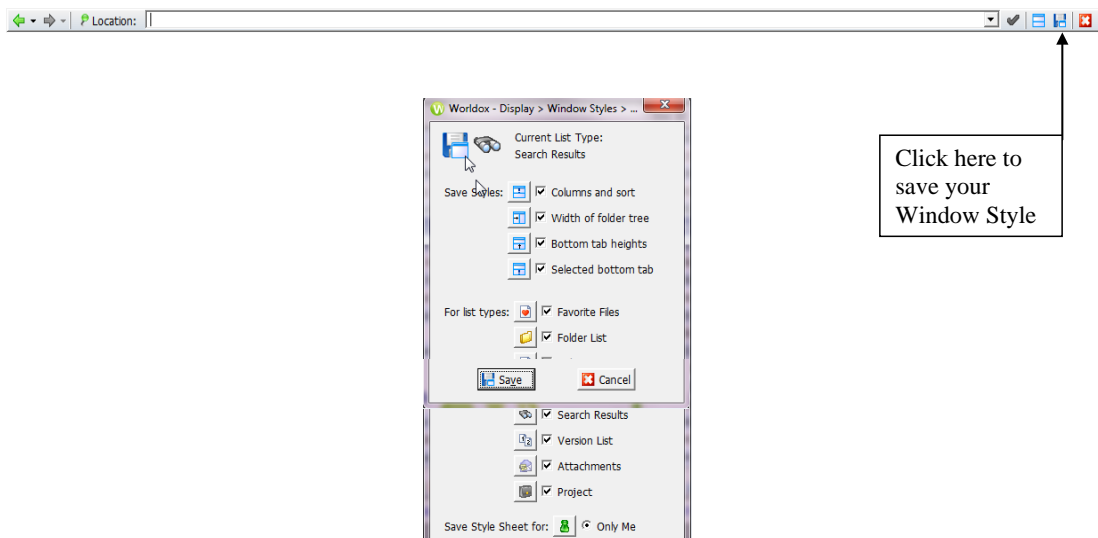
Date Grouping



If you have chosen to sort by **Modified Date** Column Heading, Worldox will automatically group the files based on date ranges as shown above. To disable this grouping feature you will need to **right-click** on the date column heading and choose **Hide Groupings**.

Worldox Window Styles Feature

Worldox **Window Styles** is a feature that allows you to save several window layout elements for a variety of Worldox list types. Once you have selected the column headings you want, sort the column headings the way you want and select the appropriate document tab you will want to save your **Window Style**.



Configurable Toolbar

Named Toolbar Buttons



The toolbar has labels for quicker learning and instant recognition.

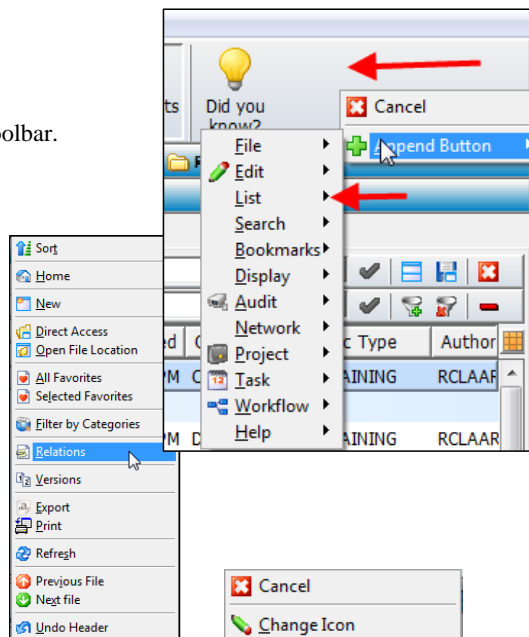
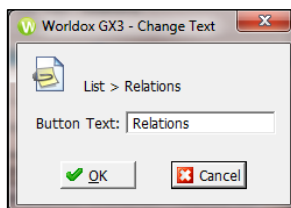
User Configurable Toolbar

You can add, remove or rearrange the buttons on the toolbar. You can even change the icons or rename the buttons.

To Configure the Toolbar:

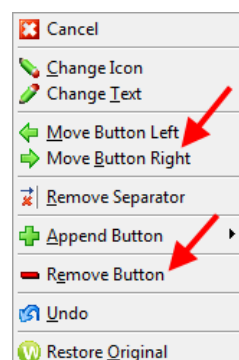
To add a button:

- 1) Right click the area to the far right on the toolbar.
- 2) Select Append
- 3) Select group button is in that you want to add
- 4) Select button you want to add. Change name if desired. Click OK and the button will appear at the end of the toolbar.



To rearrange buttons:

- 1) Right click on button you want to move.
- 2) Select Move Button Left or Right

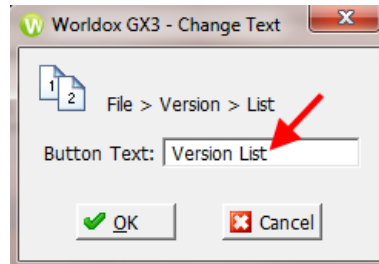


To delete a button:

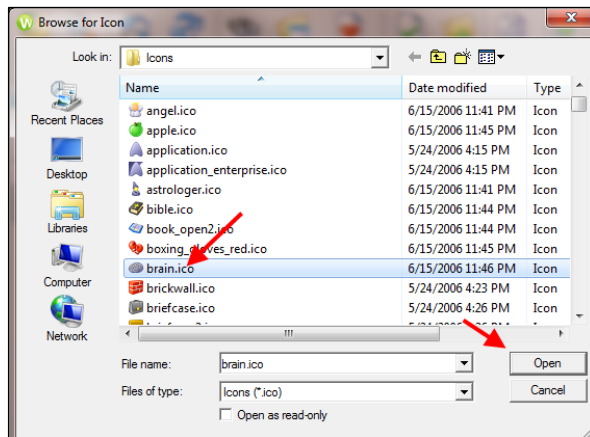
- 1) Right click button you want to delete.
- 2) Select Remove Button.

To change the Text:

- 1) Right click button you want to modify.
- 2) Select Change Text.
- 3) Change Text to what you want and Click OK.

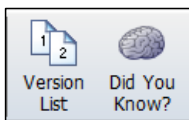


To change the Icon:



- 1) Right click button you want to modify.
- 2) Select Change Icon.
- 3) Select Icon you want to use and Click Open.

Now you have your new icons!



You can also remove the separator or restore to your defaults from the right click menu.

View Buttons

The buttons to the left of your work list are configurable.

When you click on the button it opens up that list at the top.

Favorite Matters displays a list of matters that you have accessed. This is similar to the Worldox Favorite Files feature except folders are tracked instead of files.

Profile Groups and **My Computer** Show profile groups and your mapped drives.

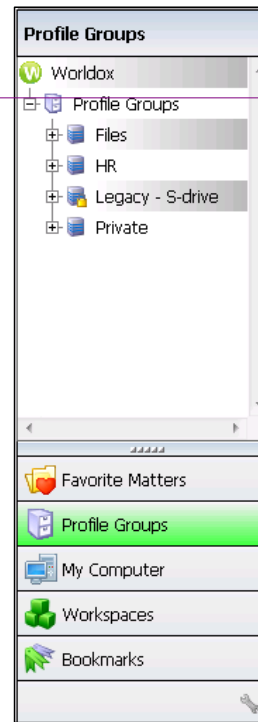
Workspaces displays files and folders that currently appear in your Workspace.

Bookmarks displays a list of your personal bookmarks.

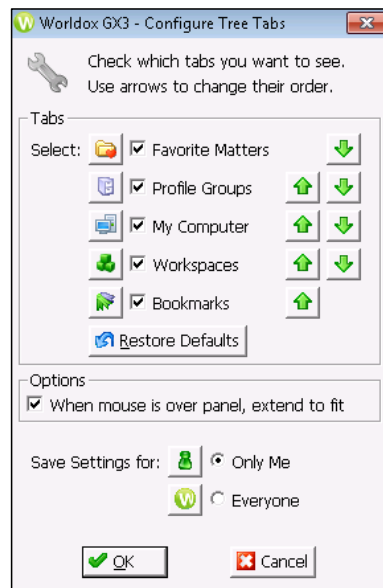
To configure the navigation pane:

The wrench icon (lower right in the navigation pane.) allows you to customize the icons that appear or reorder them in the order you would prefer.

- 1) Select or deselect the check box next to the Tabs you want to appear or remove.
- 2) Click the up and down green arrow buttons to change the order of the Tabs.
- 3) Click **Restore Defaults** to restore the buttons to the default order.
- 4) Select the **When mouse is over panel, extend to fit** check box if you want the Folder Tree to automatically resize when your mouse is placed over the Folder Tree.
- 5) Click **OK** when you have made all your desired selections.

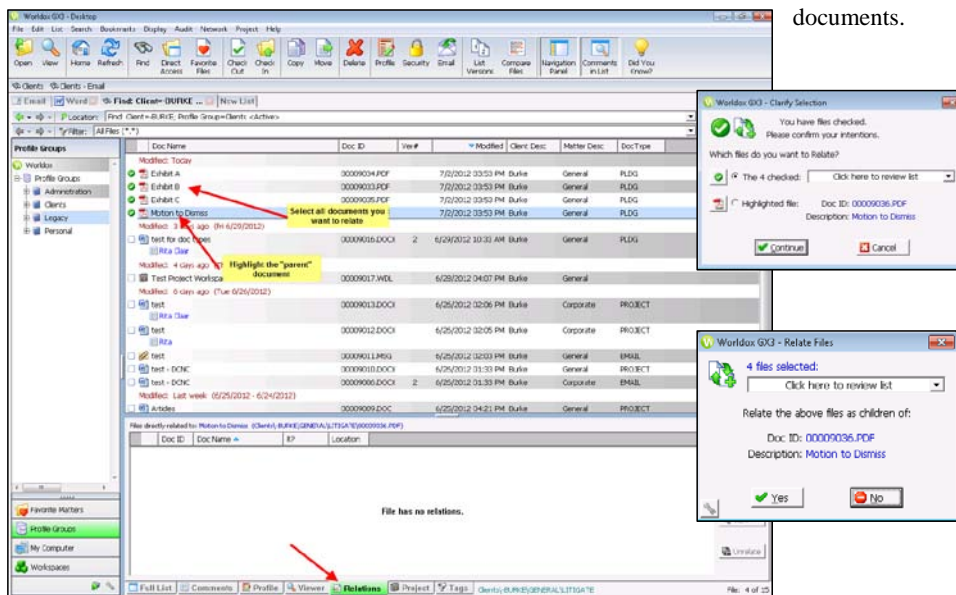


Comment [LP1]:



Related Documents

To relate one file to several to find them all quickly you can select a “parent” file and relate all the “children” files to it. Search for and display the documents you wish to relate to each other. Then simply select the files and drag to the relations box. Whichever file is highlighted when you drag and drop is considered the “parent”. You can add to these related files or unrelated them at any time. Now whenever you are viewing a file in the worklist you can select the relations tab at the bottom or Select List from the top menu then Relations and it will show you all related documents.

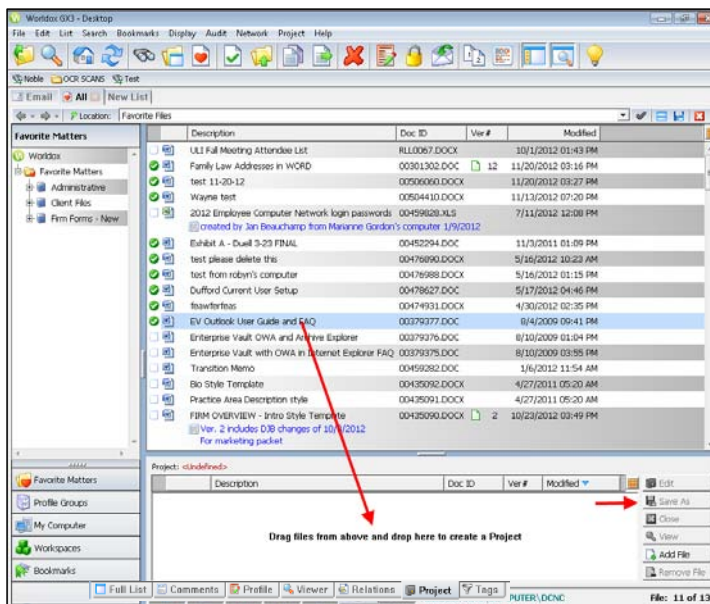


Projects

Projects group files together for quick retrieval without moving or copying them. This works great if you have diverse files – That are found by multiple searches.

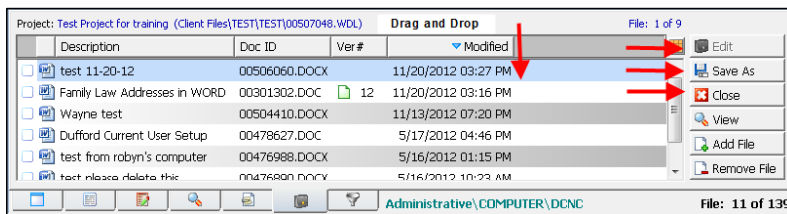
To create a Project:

- 1) Find files you wish to save in the Project.
- 2) Click on the Project tab to open it.
- 3) Drag and Drop the files into the Project window.
- 4) Perform additional searches to find documents to add to your Project.
- 5) Drag and Drop these additional files to the Project window.
- 6) When all documents have been added to your Project – Click Save As.
- 7) Fill out the profile. Use Project as the Doc Type.
- 8) Click OK and your Project folder is complete. Close the project in the project tab.



You can add and remove files at any time. Find the Project, highlight (click once) it then click the Project tab. From the right side of the projects tab click edit. Perform a search to find the files you want to add then drag them to the project tab. Select Save As to save the changes to the Project. Close the project in the project tab.

To quickly find your newly created projects click on the favorites tab on the toolbar and select Projects.



Alternatively you can find all your projects by searching for the Doc Type of Project.

Workspaces - Projects

Workspaces is a way to quickly access and create projects, it also “bookmarks” folders for quick access.

First you need to subscribe to a client/matter:

- 1) Click on Workspaces button to open at top.
- 2) Right-Click the My Workspaces icon.
- 3) Select the Profile Group where the Client and Matter are located
- 4) Now enter the Client and Matter then Click OK. It will now show under the My Workspaces icon as a folder.
- 5) You can now change the name if you would like – simply right-click the folder and choose rename workspace.

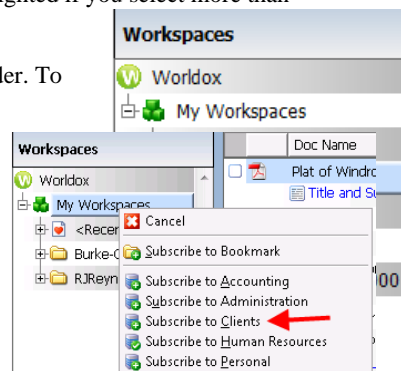
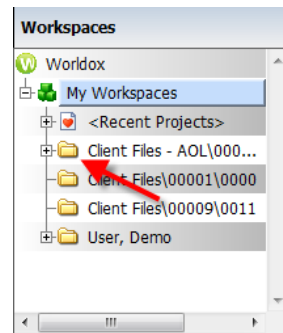
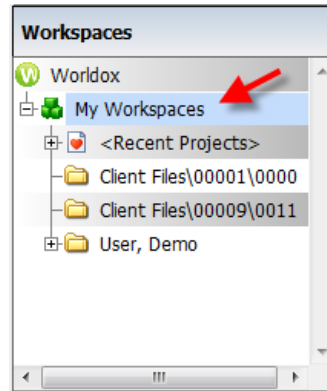
Now when you click on this folder it will show you everything for that client and matter. If there are projects that have already been created they will automatically show under the folder in My Workspaces.

To create a new project for that Client and Matter:

- 1) Search for documents you want to include in your project.
- 2) Drag them to the Top folder for the Client and Matter – Name the Project and Click OK.
- 3) It will confirm that you want all selected or the one highlighted if you select more than one document. Click Continue.
- 4) Now your new project is under the Client and Matter folder. To add more documents simply drag and drop to your project.

These will stay here until you delete the project or unsubscribe to the Client and Matter. To unsubscribe simply right click on the Client/Matter folder and select unsubscribe. You can also create a project from here.

Please note that if you create a project from here it will take the doc type from the first document in the client/matter folder. You will want to go edit the profile to the Project doc type.



Categories

Categories are visual cues (a combination of keywords and/or symbols) that can be created, defined, and then assigned to files helping you to further organize files by providing additional information. You are able to assign more than one category to a file. There are 3 types of Categories available: Personal, Public or Folder.

- **Personal:** Each user can create and use categories that are only viewable to that user.
- **Public:** These are created by the Administrator and are available and viewable by all users.
- **Folder:** These are created and available to all users, but are only available in that folder.

Creating Categories

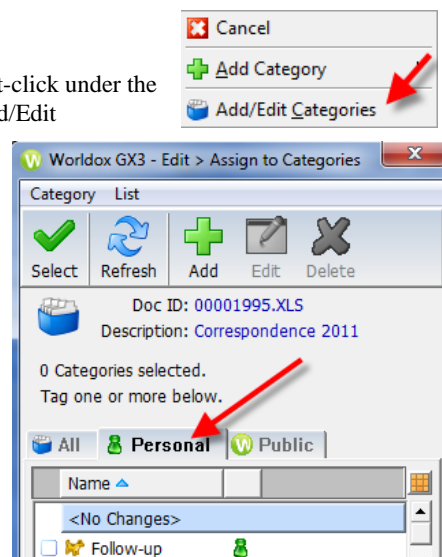
First add Categories to your column header:

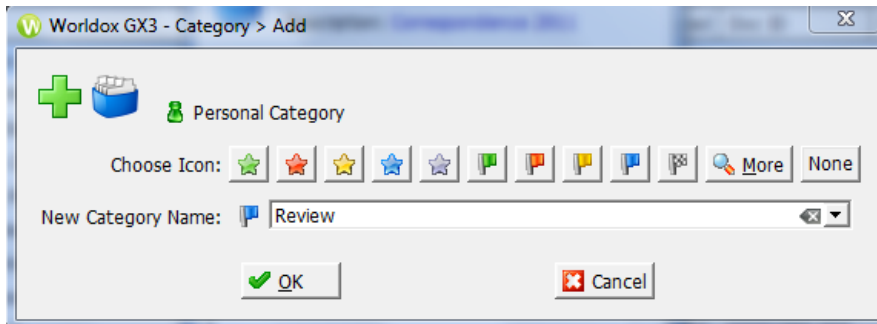
By adding this column header to a Worldox file list it will allow you to view the icon(s) and text of any category assigned to the files listed.

1. From the Worldox File List window, left-click on any gray area in the **Column Heading** bar to display the list of fields that can be added.
2. Select **Categories** which will appear as a Column Heading.
3. Resize the Categories column header as necessary. This is also a column heading that you can sort on.
4. Note that category icons will always appear and text truncated to match space available.

Create a Personal Category

1. From the Worldox File List window, right-click under the Category column on a file and choose Add/Edit Categories.
2. Click Add.
3. Click the Personal tab. All Personal categories will display.

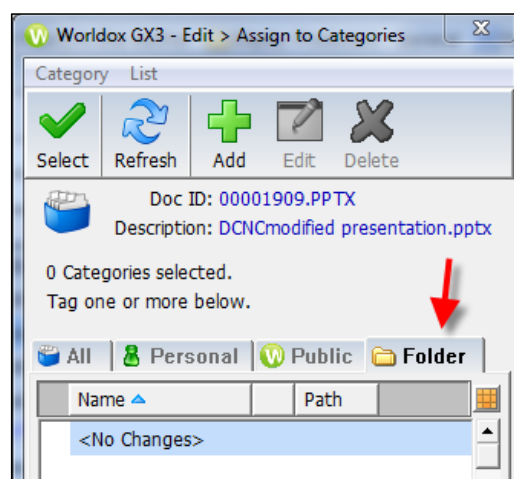
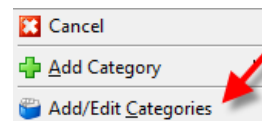




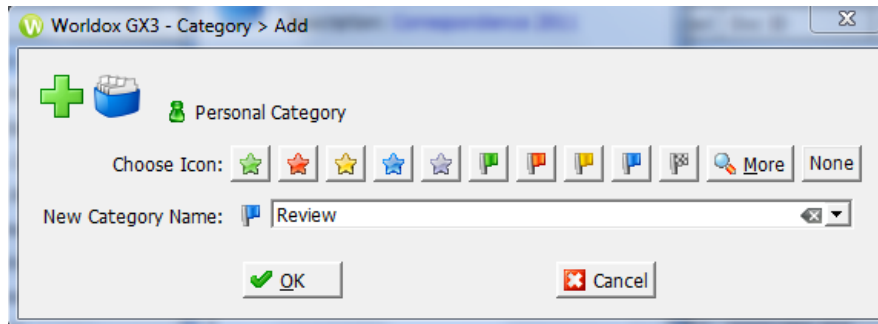
4. Choose an icon to best represent your category. Click More to view more available icons.
5. In the **New Category Name** field, enter a name for the category.
6. Click **OK**. The new Personal category will now be available and viewable to only the user that created and assigned the Personal category.

Create a Folder Category (You must do a folder search (Direct Access or from Navigation Pane.)

1. From the Worldox File Open window, right-click on the **Category** column on a file and choose **Add/Edit Categories**. **Note the Category will be created in the folder of the file selected.**
2. Click **Add**.
3. Click the **Folder** tab. All Folder categories will display.



4. Choose an icon to best represent your category. Click **More** to view more available icons.

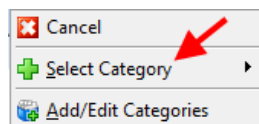


5. In the **New Category Name** field, enter a name for the category.
6. Click **OK**. The new Folder category will now be available and viewable to only the user that created and assigned the Folder category. The Folder category will only be available for use in the Folder where the category was created.

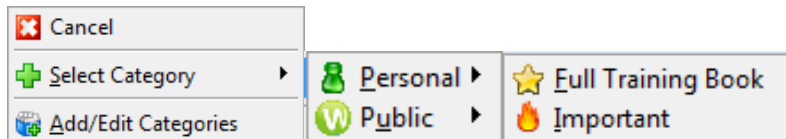
Assign Categories

Assign a Category to a selected file using Add Category.

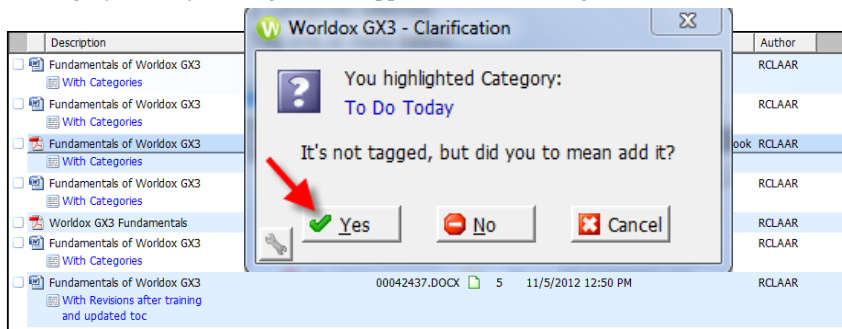
1. From the Worldox File List window, select the file or files by selecting the ones you want to assign a Category to. Right-click under the **Category** column. Place your insertion point over **Select Category**.



2. A list of available Categories will display (e.g., Personal, Public, Folder).

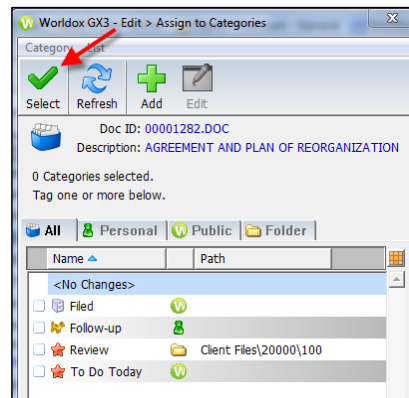


- Place your insertion point over the Category you wish to make your selection from. A list of available Categories will be display. Select the desired Category. The icon and Category Name you assigned will appear under the Categories column header.



Using Add/Edit Categories

- From the Worldox File List window, select the file you want to assign a Category to. Right-click on the **Category** column. Place your insertion point over **Add/Edit Categories**. Or you access it from the File Menu or add to the **Assign to Categories** button to your toolbar.
- The Assign to Categories window will appear.
- Select the Category you want to assign by using checkbox and click **Select**. The icon and Category Name you assigned will appear under the Categories column header.
- The Clarification window will appear if you did not use the checkbox and just had an item highlighted. Click **Yes** to assign the Category if you forgot to check it and thus assign it.



Note that using this dialog only assigns the Category to the file selected. To assign more than a single file see section below and use file tag in combination with the right-mouse click method.

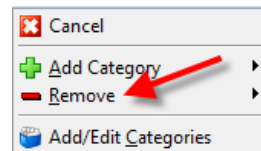
Assign Multiple Categories

You can assign more than one Category to a file. Follow the steps described above. When multiple Categories are assigned to a file, they will appear in the following order when in the File

Open window: Personal, Folder, and then Public. Categories in subsets will appear in alphabetical order.

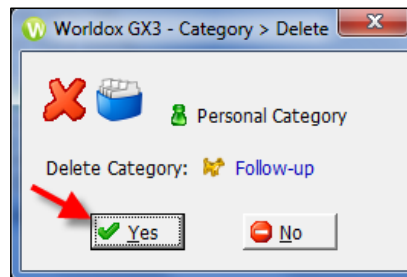
Remove a Category

1. From the Worldox File List window, select the file you want to assign a Category to. Right-click on the **Category** column.
2. Choose **Remove** and select the Category you wish to remove.



Delete a Category

1. From the Worldox File List window, right-click on the **Category** column.
2. The Assign to Categories window will appear.
3. Click on the tab (e.g., **Personal**) that contains the Category you want to remove from the list of available Categories.
4. Select the Category and click **Delete**.
5. Click **Yes** to delete the Category.



If you delete a Category that is assigned to files, the Category will be deleted from the list of available Categories and also from the files that it has been assigned to.

A great way to filter documents with a specific category is to use the TAGS Filter tab. See Page 13 for more information about TAGS.

Worldox Keyboard Shortcuts

File Management:

Open.....	Enter
Open With	Ctrl + W
Open, Place Cursor in Location Line.....	F2
Open, View File.....	F9
Open, Security	F11
Open, Sort Key	F12
Open, Toggle Comments on/off	Shift + F6
Open, Place Cursor in the File Filter List	F3
View, Move Next Occurrence of Text.....	F3
View, Move Previous Occurrence of Text	Shift + F3
Select, All.....	Ctrl + A
Deselect All.....	Alt + Ctrl + A
Toggle Select on/off.....	Ctrl + I
Move.....	F7
Copy.....	F8
Check-Out.....	Alt + F8
Check-In.....	Alt + F9
Security.....	F11
Audit Trail	Alt + F11
Versions, Compare.....	Alt + Ctrl + C
Versions, New.....	Ctrl + Shift + V
Delete	Del
Email	Ctrl + M
Print List	Ctrl + P

Editing:

Profile.....	Ctrl + E
Add to Favorites.....	Ctrl + NumPad Plus symbol
Remove from Favorites	Ctrl + NumPad + minus symbol
Copy Location to Clipboard	Ctrl + C
Preferences.....	Ctrl + F1
Starting List	Ctrl + F2

List:

New.....	Ctrl + Shift + Ins
Direct Access	Ctrl + O
Selected Favorite Files	Alt + Ctrl + F
Relations.....	Alt + Ctrl + R
Versions.....	Alt + Ctrl + V
Refresh.....	F5
Previous File.....	Ctrl + U
Next File	Ctrl + N

Search:

Find.....	Ctrl + F
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Bookmarks:

Add this List.....	Ctrl + D
Create New	Ctrl + Shift + D
Manage	Ctrl + B

Display:

Bottom Tabs, Full List.....	Ctrl + 1
Comments.....	Ctrl + 2
Profile	Ctrl + 3
Profile	Ctrl + 3
Viewer.....	Ctrl + 4
Relations	Ctrl + 5
Project	Ctrl + 6
Sort	F12
Location Bar, Edit.....	F2
Location Bar, Show/Hide	Alt + F2
File Filter Bar, Edit.....	Shift + F2
File Filter Bar, Show/Hide	Alt + F3
WorkList Tabs, Open Left of Current	Ctrl + PgUp
WorkList Tabs, Open Right of Current..	Ctrl + PgDn
WorkList Tabs, Open First Tab	Ctrl + Shift + 1
WorkList Tabs, Open Second Tab....	Ctrl + Shift + 2
WorkList Tabs, Open Third Tab.....	Ctrl + Shift + 3
WorkList Tabs, Open Fourth Tab	Ctrl + Shift + 4
WorkList Tabs, Open Fifth Tab	Ctrl + Shift + 5
WorkList Tabs, Open Sixth Tab	Ctrl + Shift + 6
WorkList Tabs, Open Seventh Tab...	Ctrl + Shift + 7
WorkList Tabs, Open Eighth Tab	Ctrl + Shift + 8
WorkList Tabs, Open Ninth Tab.....	Ctrl + Shift + 9
WorkList Tabs, Last Tab.....	Ctrl + Shift + 0
WorkList Tabs, Current Tab	Ctrl + Shift + F11
WorkList Tabs, All Other Tab.....	Ctrl + Shift + F12

Options:

Audit Trail Query	Ctrl + F7
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Help:

Access Help	F1
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