World Software Corporation 266 Harristown Suite 201 Glen Rock, NJ 074522

# Worldox GX4 Overview

www.worldox.com





# What's New in Worldox GX4

Worldox GX4 has been totally redesigned with two (2) key focal points:

# Ease of Use Mobility

Our main goal is to make GX4 as effortless as possible.

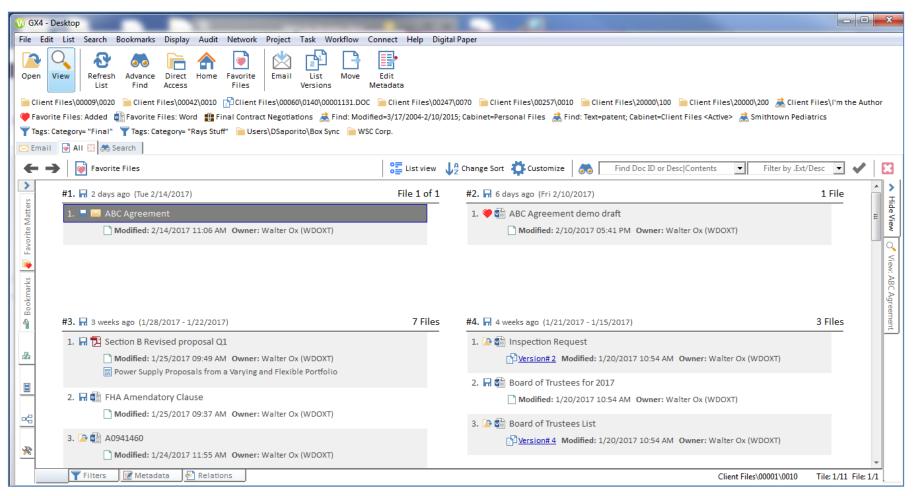
Many new features significantly reduce your time to file and retrieve documents, including:

- Broad document tagging and searching
- Active Profiling Follow Me Favorites technology knows which files you worked on recently and then presents these choices for quick filing



# User Changes in the File List

Worldox GX4 offers a clean and simple user interface with a more modern theme.





### Preview Files Panel and In-line Viewing Technology

When a file is highlighted in the file list, click the **View** tab on the right side of the screen to preview the file's content. To close the viewer window, click the **Hide View** tab to collapse it.

🕔 GX4 - Desktop		
File Edit List Search Bookmarks Display Audit Network Project Task W	orkflow Connect Help Digital Pa	per
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DocType LTR Letter	Accessed 1/23/2017	(Name), of
Author WC Cooke, W	Modified 1/23/2017 11:24 AM	(Address), as trustee of this trust. is therefore granted in
Typist ABARRETO Barreto, /	Size 42.9 KB	trust, the assets proclaimed in the attached Section . These assets are to be
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### Field Table Lookup for Code and Description

When adding or changing profile metadata, start typing either the field's Description or Code to automatically locate it in the list and populate the field. Worldox does not delineate between code and description and it highlights any matching codes or descriptions in the field table list. You can type additional characters to refine your search. In the following example, the user began to type "ME" in the Matter field. Any codes and descriptions with those letters automatically appear in the list for quick and easy selection.

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	Save as type: Wor	d Document (*.docx)		<u> </u>	Cancel



#### **Enhanced Search Capabilities**

The new Search tab's search field allows you to find files based on File Contents, Doc ID or Description, or Doc ID or Description/Contents. The other allows you to search for text to find within the contents of files.

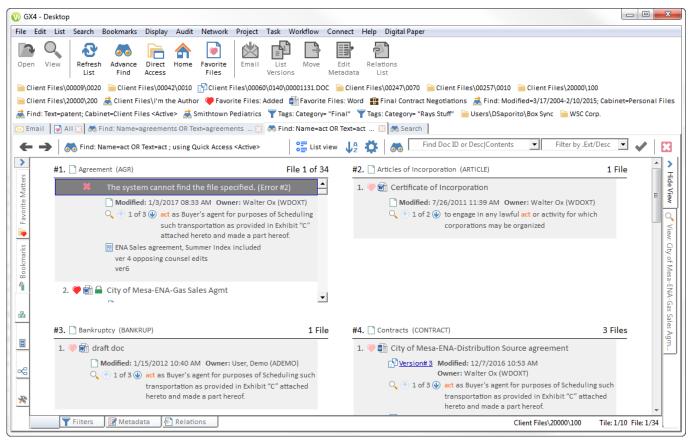
**Note:** GX4 continues to provide search functions that were available in earlier versions of Worldox.

🕦 GX4 - Desktop									- 0 ×			
File Edit List Search Bookmarks Display Audit Network Project Salvage Task	Workflow Con	nect Help Cor	npare with compareD	ocs RightSignature	ShareFile S	ony						
	d You Copy De	elete Edit Metadata	Security Email	Compare Files Navigation Panel	n Comments in List Show/Hide	Filter by Category	Print Export	Versions Sh	end to areFile areFile			
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		<del>۳</del> #1.	Agreement (AGR)			F	ile 1 of 48	#2. 🗋 A	Articles of Incorporatio	on (ARTICLE)		1 File
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#### Enhanced Search Results

The following example shows search results for files that contain the text '"act". A line appears below the file name to show the snippet of found text in the file. The word "act" displays in bold in each line. Arrows in the line under the file name indicate the next instance in the file where text was found. You are not required to open the file if you quickly need to confirm the occurrence(s) of text found.





#### Search for Doc ID or Description/Contents

File lists and Tile views have Search for Doc ID or Description/Contents fields. Type search criteria in the field and then click the check mark icon.

🚝 List view 🐙 Change Sort 🃫 Customize 🧼 Find Doc ID or Desc Contents 💽 Filter by .Ext/Desc 💌	V
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The file list or tile view displays files that match the search criteria.

0 GX4 - Desktop	
File Edit List Search Bookmarks Display Audit Network Project Task Workflow C	onnect Help Digital Paper
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#1. Agreement (AGR) File 1 of 34	#2. Articles of Incorporation (ARTICLE)
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#3. Bankruptcy (BANKRUP) 1 File	#4. Contracts (CONTRACT) 3 Files
1. 💚 🖬 draft doc	1. 🔍 🕼 City of Mesa-ENA-Distribution Source agreement
Modified: 1/15/2012 10:40 AM Owner: User, Demo (ADEMO)  Modified: 1/15/2012 10:40 AM	City of Miesa-ENA-Distribution source agreement     Modified: 12/7/2016 10:53 AM     Owner: Walter OX (WDOXT)     Owner: Walter OX (WDOXT)     Owner: act as Buyer's agent for purposes of Scheduling such     transportation as provided in Exhibit "C" attached     hereto and made a part hereof.     v
Filters Metadata	Client Files\20000\100 Tile: 1/10 File: 1/34



#### Filter Buttons on the Search Tab

When you type criteria into the Search bar and click **Search**, the cabinets that are included in your site's Quick Access template are the ones that will be searched by default. You can narrow a search by adding multiple filters for Cabinets, Profiles, Categories or Dates.

Enter a document's Description, ID or contents.

Click a filter button, for example **Add Cabinet filters**. The Select Cabinet dialog appears. Check a cabinet or cabinets to search.

The Search tab's field box displays the name of the cabinet you want to search.

🗞 Search	
api	🔹 👻 ✔ Search
📓 Add Cabinet filters 🛛 🕼 Add Profile filters 🖉 Add Category filters 🕅 🛗 Add Date filters 🖉 🤄 Undo	
Word Files	

You can combine Cabinet, Profile, Category and Date filters to further narrow your search. **Note:** There is only one limitation for searching more than one cabinet if you add a profile field. See A Limitation when using Search Tab Filter Buttons in the Worldox GX4 Professional User Guide: The Basics for details.



#### Worldox Indexer Service

The Worldox Indexer provides Worldox users with the ability to search profile and text data in large document stores in the Worldox DMS (Document Management System). Beginning with the Worldox Update File 10 (WDU10) revision of Worldox GX4, Indexer as a Service generates other services that carry out scheduled tasks. This has the added benefit that while an update is occurring, changes can continue posting to the database.

Please note that the WDU 11 update includes the Indexer as a Service (IAAS) technology introduced in WDU 10, as well as the option to run the Indexer in desktop mode. With WDU 11 code, Indexer as a Service (IaaS) is no longer the only way to index data, but it is the best practice.

The Worldox Indexer Service is accompanied by the Worldox Service Installer named WDSLAUNCHER and the Worldox Indexer Console.

WDSERVICE (	GX4 - S	ervice Information		23			
Log in to servi	ce as:						
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Password: **********							
Startup Type:	A	UTO START	Lange	User			
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Service Name:	World	ox Indexer Service					
Display Name:	World	ox Indexer Service					
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Stop Service							
Cancel							

WDSLAUNCHER

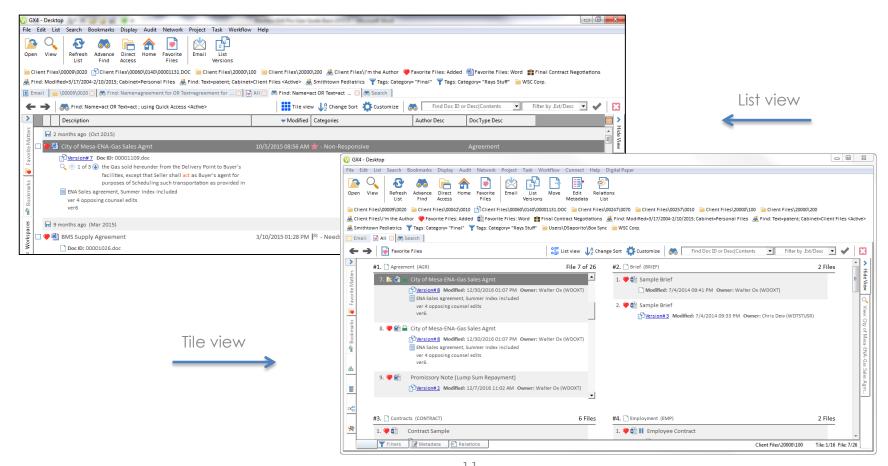
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Worldox Indexer Console



#### Executive Tile/Grid or List Views

In the file list view, click the Switch to Tile View **Tiles** to view profile information for files in a grid Switch to tile view than list view. Tile views display groups of records in a rectangular tile. You can sort tile files by Date Accessed/Modified/Created, Category, DocType Code/Description, Author Code/Description or Typist Code/Description.





### Tile View Layout

In the Tile view, click the **Customize** button and select **Tile columns/layout**. A dialog box opens where you choose your preferred layout and defaults based upon your personal preferences or monitor size.

In the following example, 2 columns per row are selected.

🖂 Ema	I 📑 All 🔛 🚓 Search	
<b>←</b>	→ Favorite Files	ange Sort 🛱 Customize 🔊 Find Doc ID or Desc Contents 💌 Filter by .Ext/Desc 💌 ✔ 😫
>	#1. Agreement (AGR) File 7 of 26	#2. Brief (BRIEF) 2 Files
Favorite Matters	5. 🎔 📷 🖾 Export Confirmation	1. ♥ ∰ Sample Brief
vorite	D <mark>Version#3</mark> Modified: 4/24/2017 03:04 PM Owner: Walter Ox (WDOXT)	Modified: 7/4/2014 09:41 PM Owner: Walter Ox (WDOXT)
E E	6. 🖤 🚮 Installment Promissory Note (Secured)	
arks	Dersion#3 Modified: 3/29/2017 08:32 AM Owner: Walter Ox (WDOXT)	7 City o
Bookmarks	<ul> <li>7. Is a City of Mesa-ENA-Gas Sales Agmt</li> <li>Wersion# 8 Modified: 12/30/2016 01:07 PM Owner: Walter Ox (WDOXT)</li> </ul>	Layout
4	ENA Sales agreement, Summer Index included	Layout Max columns per row: 2 ▼ Pixels between columns: 40 ▼ Pixels between rows: 30 ▼ File Lists
2	ver6.	Frame them. Max lines: 5 ▼ Min Width (pixels): 350 ▼
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	Filters 📝 Metadata 🔊 Relations	Client Files\20000\100 Tile: 1/16 File: 7/26



#### Change File Sorting in the Tile View

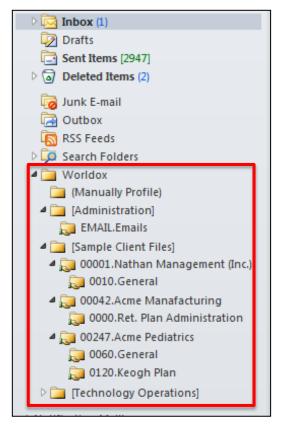
In the Tile view, select **Change Sort** and choose to sort by dates, doc types, categories and other key fields. Content is presented per your sort field in a summarized manner to quickly find the file you need.

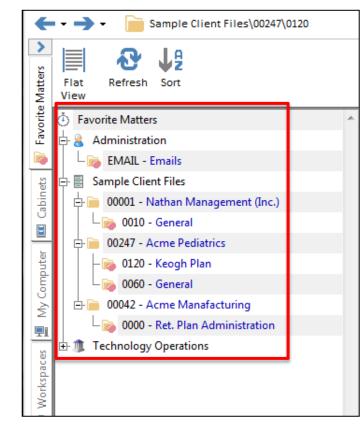
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File Edit List Search Bookmarks Display Audit Network Project Task Workflow Connect	Help Digital Paper
Image: Copen View         Image: CopenView         Image: CopenView	Relations List
Item Files\1'm the Author       Favorite Files: Added       Favorite Files: Word       Final Contract Negoti         Item Files\1'm the Author       Tags: Category= "Final"       Tags: Category= "Rays Stuff"       Users\DSaporito\         Item Files\1'm       Item Final       Item Final       Tags: Category= "Rays Stuff"       Users\DSaporito\         Item Files\1'm       Item Final       Item Final       Item Final       Item Final       Item Final         Item Files\1'm       Item Final       Item Final       Item Final       Item Final       Item Final         Item Files\1'm       Item Final       Item Final       Item Final       Item Final       Item Final         Item Files\1'm       Item Final       Item Final       Item Final       Item Final       Item Final         Item Files\1'm       Item Final       Item Final       Item Final       Item Final       Item Final         Item Files\1'm       Item Final       Item Final       Item Final       Item Final       Item Final         Item Files\1'm       Item Final       Item Final       Item Final       Item Final       Item Final         Item Files\1'm       Item Final       Item Final       Item Final       Item Final       Item Final         Item Final       Item Final       Item Fina	
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Version#3 Modified: 3/29/2017 08:32 AM Owner: Walter Ox (WDOXT)	↓§ Sort files another way
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8. 🤎 💼 🔒 City of Mesa-ENA-Gas Sales Agmt	
Comparison of the second	▼ Agm
#3. Contracts (CONTRACT) 6 Fi	es #4. 🗋 Employment (EMP) 2 Files
1. 💗 🏥 Contract Sample	1. 🎔 🕼 II Employee Contract
Filters 📝 Metadata 🖗 Relations	Client Files\20000\100 Tile: 1/16 File: 7/26



#### Microsoft Outlook Drop Folders now Automatically Correlate with Favorite Matters

Favorite Matters will appear as Worldox drop folders within Microsoft Outlook. You can easily move your incoming and outgoing emails to these folders in Outlook so that they are immediately saved into Worldox.







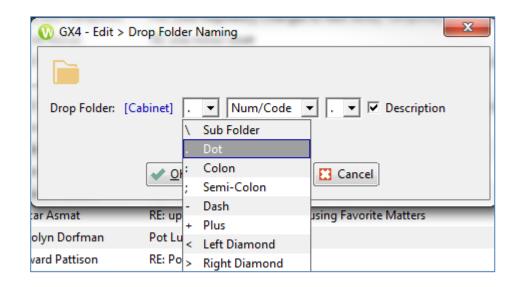
#### Drop Folder Naming

Worldox GX4 dated 12/7/2015 and later now provides you with the ability to control the drop folder naming structure. Just click the **Email** tab in Worldox and then select **Drop Folder Naming** from the Edit menu.

In the Edit > Drop Folder Naming dialog you can select different characters to use within the Worldox drop folder structure in Outlook. You can also choose whether you want to display the Num/Code before the Description or Description before the Num/Code. You can make the naming convention longer or shorter by adding or removing Description and just using the Num/Code or vice versa.

There are numerous separator characters that you can use in the drop folder naming structure. Note the slash will create a tree structure while others create a single line display based on the choices made.







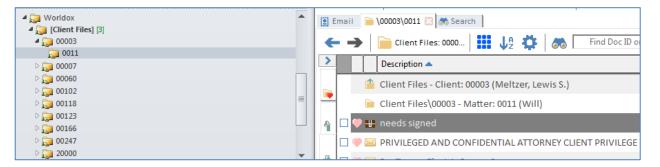
#### Drop Folder Naming Example

The following is just one example of the various ways you can configure your Worldox drop folders in Microsoft Outlook. For other examples, please see the Configuring Worldox Drop Folder Structure in Microsoft Outlook section in Worldox GX4 Professional User Guide: The Basics.

In this example, the Description has been de-selected. Note that the second drop-down list of characters is removed from the dialog.



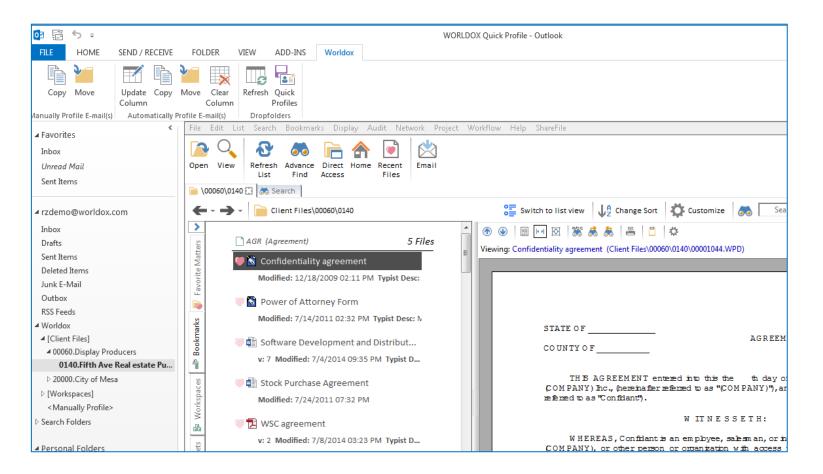
This is how the drop folders are displayed in Outlook. The slash creates a tree structure and only the Num/Code is shown.





#### View Worldox Content from within Outlook

In Microsoft Outlook, double-click a matter folder under Worldox to launch the Worldox file list. Click a file to preview content directly from Outlook.





#### Microsoft Outlook 'Active Profiling'

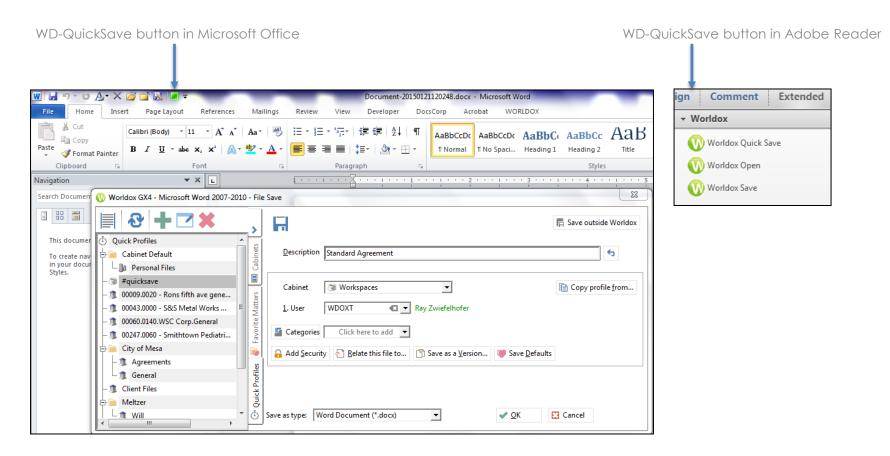
A new Worldox Profile column in Microsoft Outlook shows suggested email heuristics. Profiled emails can then be added to appropriate clients and matters.

📴 📰 🕤 🕫				Inbox - rzdemo@worldox.com
FILE HOME SEND / RECEIVE	FOLDER VIEW ADD-I	NS Worldox		
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Inbox	!② [1] [1] [1] [1] [1] [1] [1] [1] [1] [1]	SUBJECT	RECEIVED 🔻	WORLDOX PROFILE
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⊿ rzdemo@worldox.com	<b>Ray Zwiefelhofer</b> Ray Zwiefelhof President World Softwar	er	Wed 1/28/2015 2:	Client: 00102   Matter: 0020
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Junk E-Mail Outbox RSS Feeds	<b>Ray Zwiefelhofer</b> From: Peggy Wechsi Sent: Tuesday, Janu To: Ray Zwiefelhofe		Wed 1/28/2015 1:	Client: 00102   Matter: 0020
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#### Microsoft Office QuickSave and Search

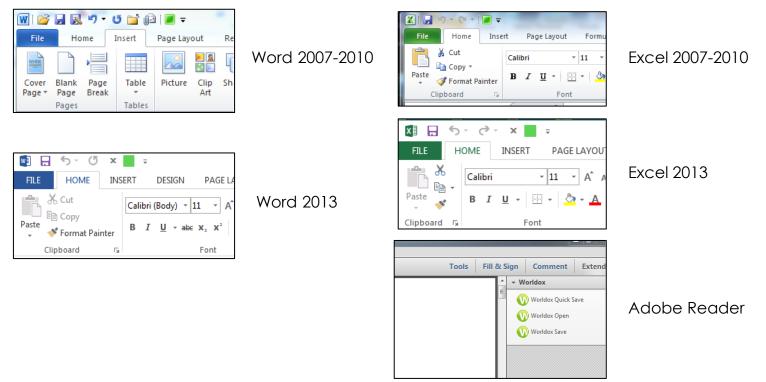
File and find documents quickly without leaving your office application. Click the green Worldox Quick Save button in Word, Excel or Adobe Reader to save a file into Worldox. You can add profile information at a later time.





#### QuickSave One-click Save

The QuickSave feature allows user to save a file into Worldox without a profile card based on a pre-defined Quick Profile template. This allows you to save a file into Worldox immediately with the option to re-profile it at a later time. This feature uses predefined Quick Profile(s) to quickly save the file to a named Worldox Quick Profile without any interaction. The feature can be accessed by using the **green** icon in the Microsoft Quick Access Toolbar. You can also access a Worldox Quick Save button from Adobe Reader.





#### Set QuickSave by Application

You can still set global and personal Quick Profiles in Worldox, but now you can also set Quick Profiles by application. This overrides the generic predefined #QuickSave.

To set this, add "/application\_name" to the Quick Profile name when you add a new Description for a Quick Profile. For example:

#QuickSave/Word for use with Word 2007-2013

#QuickSave/Excel for use with Excel 2007-2013

#QuickSave/Adobe for use with Adobe Reader X and Acrobat X and higher

🕔 GX4 Enterprise - M	licrosoft Word 2007-2013 - File	Save			x
Tree View Refresh	Add Edit Delete	H			Save outside Worldox
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Author: HELLE Doc Type: TEST	🕔 GX4 Enterprise - Add Quid	ck Profile			Σ
Typist: DSAPORIT	Tree View Refresh Sort		<u>&gt;</u> +		
Author: 000000 User,	Documentation     DSAPORIT Donna's workprodu	~ ·	Description	#QuickSave/Word	5
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Folder: DSAPORIT D	GENERAL Uncategorized		1. Folder	TECH Tech Support	
Word Files	ADMIN		Favorit		
Doc Type: TEST Typist: DSAPORIT	٩			✓ <u>O</u> K Cancel	



# Redesigned Toolbar to Quickly Perform Searches within Word and Excel

	D 4 W 1
🕎 🔒 🕤 · 🖉 📮 🗧	Document1 - Word
FILE HOME INSERT DESIGN PAGE LAYOUT	REFERENCES MAILINGS REVIEW VIEW Docs
To Find: 👔 Same Profile	🚨 Update Footer 🛛 🗊 Temporarily Clear Stamp 🗐 🗊
🏦 Search for the DocID or Name - Content  🏦 Document Favorites	🕼 Clear Whole Stamp 💸 Wipe Footer 🖉 🕽
A QuickSaved Documents	🕼 Clear Stamp code 🛛 🕀 Refresh Caption 🖉
Searches	Document Stamping



# Selecting One-click Favorites within the New, Streamlined Interface

Worldox GX4 - Desktop

You can click a heart 💚 icon next to each file to add or remove it from the personal favorites

File Edit List Search Bookmarks Display Audit Network Project Workflow Help ShareFile

View Refresh Advance Email Open Direct Home Recent List Find Access Files \20000\100 🖸 🚲 Search Client Files\20000\100 > AGR (Agreement) 4 Files CONTRACT (Contracts) Favorite Matters x 1 📑 Worldox GX4 - List > Selected Favorites City of Mesa-Contract to v: 2 Modified: 1/14/2015 ( ۲ In the List >🖤 🖬 City of Mesa-ENA-Gas S ò Filter by: 👤 🔽 My Chosen Favorites Selected Favorites < Just these 5 Modified: 10/17/2014 marks dialog, you can 🕑 🗌 🔟 Word Just these ENA Sales agreement, Si select file types to 🗷 🗌 Excel Just these ver 4 opposing counsel Bo filter in order to view P PowerPoint Just these ver6 selected files in the Workspaces Outlook Just these i 🖬 🔒 contract for fifth st prop list or tile view. Acrobat < Just these v: 2 Modified: 9/25/2014 Modified terms Currently Checked-Out < Just these 4 ver 2 Unclick a heart 💚 Show Filtered Favorites icon next to a file if <u>i</u>∎≣ Export Show All Favorite Files you no longer want it Modified: 9/24/2014 01:22 to appear as a Cancel Favorite.



#### Reorganized File Save Dialog

File Save dialog boxes now feature convenient Cabinets, Favorite Matters and Quick Profiles tabs. When you save a new file, click one of those tabs and then double-click an item in the list to populate profile fields with different information. In the following example, the file is originally being saved to the Client Files cabinet with profile metadata pertaining to that cabinet.

ſ	🛞 GX4 - Microsoft Word 2007-2016 - File Save As	Worldox by launching
Fly out quick save menus	Save outside Worldox	the native save dialog for the program you are running.
	Description City of Mesa - Contract template	<ul> <li>File descriptions and comments are combined into one field.</li> </ul>
	1. Client         20000         Image: City of Mesa           2. Matter         100         Image: General	field. Simply press the Enter or Return key after you finish typing your
	3. DocType     AGR     Agreement       4. Author     AAGUIL     Aguilar, Alex       5. Typist     AAGUIL     Aguilar, Alex	description to add comments.
	S     5. Typist     AAGUIL     ▲       ▲     ▲     ▲       ▲     ▲       ▲     Click here to add	
	Add Security Relate this file to Save as a Version Save to Project Make Defaults	
Field inline adding of categories	Save as type: Word Document (*.docx)	



#### Edit Categories from the File Save Dialog

You can quickly assign or edit categories from the File Save dialog. In the Categories field box, start typing the name of the category you want to assign to automatically select it. Or you can click the drop-down button next to the field box to select a category from the list of names. Click **Undo 5** to make changes if necessary.

0	3X4 - Microsoft Word 2007-2016 - File Save	<u> </u>
	Save outside <u>W</u> orldox	
Cabinets	Description Employee Handbook	
Fav Matters	Cabinet Personal Files    Copy metadata from   LUser Required   *	
🚽 Fav I	2. SubFldr ★	
s 🕞 Quick Profiles	Categories       For       Image: Categories       For                        Add Sect </td <td></td>	
Workspaces	Save as type: Word Document (*.docx)	



## Edit Security, Relations, Versions, Projects and Defaults from the File Save Dialog

The File Save dialog features buttons that allow you to assign security groups, relate the file being saved to another file, save the file as a new version or save defaults.

0	GX4 - Microsoft W	ord 2007-2016 - File Save As	23
		Save outside Wo	ldox
] Cabinets	<u>D</u> escription	Standard Hold Harmless Agreement	
Fav Matters	🍅 Cabinet	Personal Files  Copy metadata from	n
v Ma	<u>1</u> . User	DEMO 🕢 User, Demo	
Fa	<u>2</u> . SubFldr	GENERAL General Documents	
ofiles	Categories	Click here to add 🔽	
Quick Profiles	Add <u>S</u> ecurit	y 🔄 <u>R</u> elate this file to 🕅 Save as a <u>V</u> ersion 📳 Save to <u>P</u> roject 🍑 <u>M</u> ake Defaults	
۵ ف			
Workspaces	Save as type: W	ord Document (*.docx)	



#### Follow Me Favorites

Access Follow Me Favorites in the Save dialog by clicking the **Favorite Matters** tab. You can quickly profile and save files into favorite matters that you have recently accessed. Follow Me Favorites are also available in Worldox/Web Mobile and on other devices.

🕔 GX4 - Microsoft Word 2007-2016 - Fil	e Sav	/e As		23
Tree View		ets <	Save outside Wor	rldox
Personal Files CHRIS	Î	Cabinets	Description Standard Hold Harmless Agreement	
Client Files           00007 Isaacson, Jesse           0050 Personal	ш	Matters	Cabinet Personal Files  Copy metadata from L. User DEMO User, Demo	n
20000 City of Mesa 100 General		🗧 Fav	2. SubFldr GENERAL General Documents	
00003 Meltzer, Lewis S. 0011 Will		Quick Profiles	Image: Click here to add       Image: Click here to add         Image: Add Security       Image: Relate this file to         Image: Add Security       Image: Relate this file to	
Personal Files DEMO User, Demo GENERAL General Documents		🕞 Quick		
Client Files O0060 WSC Corp. O140 General	-	🖶 Workspaces	Save as type: Word Document (*.docx)	



#### Workspaces on File Save

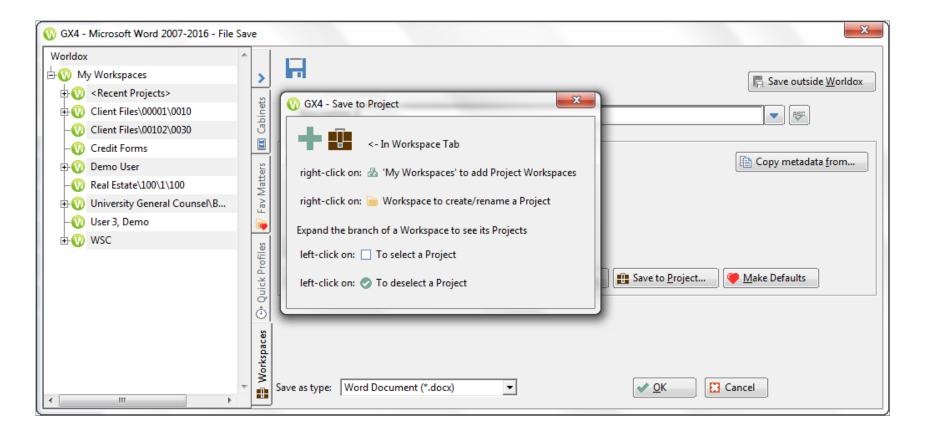
As you save a new file, you can click the **Workspaces** flyout menu and save the file to a certain Workspace project.

🔞 GX4 - Microsoft Word 2007-2016 - File Sav	e							23	
Worldox         Image: Worldo	🕞 Quick Profiles 😽 Fav Matters 🔳 🔟	Description Cabinet 1. Client 2. Matter 3. DocType 4. Author 5. Typist	Installmen Client 00007 0050 AGR DEMO5 DEMO5 Click I	Files	€3 ▼ Fags: Catege imail → Ag	Isaacson, Jesse ory= "Final"  Tags: Category= "Rays Stuff" needs sig  Search Project: needs sig (Client Files\00060\0 Description reement (AGR)	Users\DSaporito\Box Sync	tside Worldox	d
4	Workspaces	Client Files		🛃 📑 Bookmarks 🛃 Favorite Matters	. 🗋 Im	Installment Promissory Note (Secured Doc ID: 00001348.doc Tage File (IMAGE) Floor Plans for new wing Doc ID: 00001036.jpg Building Photo for File Doc ID: 00001037.jpg 28		4/18/2017 01:11 PN 7/14/2011 01:43 PN 3/7/2011 10:32 AN	N



#### Save to Project on File Save

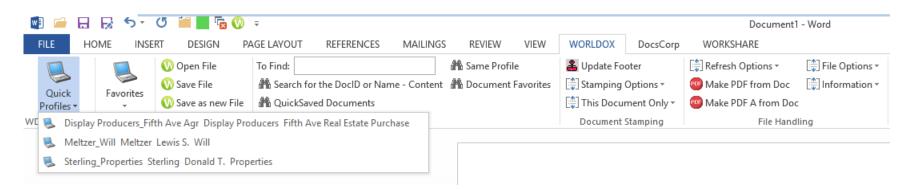
The File Save dialog for new files has a **Save to Project** button so you can add, create, rename or select projects under a Workspaces branch while saving the new file.





# Worldox Ribbon: Quick Profiles, Favorite Matters and Make PDF Options

A Worldox ribbon is available in the toolbar when using Microsoft Word and Excel. In previous versions of Worldox, options for Searches, Document Stamping and File Handling have been available. Worldox GX4 now provides Quick Profiles and Favorite Matters tabs on the ribbon bar, as well as new Make PDF and Make PDF/A options in the File Handling tab. These new features are advantageous and time-saving shortcuts to use when saving files into Worldox.



The additions of Quick Profiles and Favorites to the Worldox ribbon bar leverage Worldox GX4's Active Profiling and Follow Me Favorites technology, which tracks the files you worked on recently and presents choices for quick filing and navigation.



### Intelligent Find

If you perform a search and too many vague results are found, you can further narrow your search criteria.

🕔 Worldox GX4 - Narrowing the search					
The search found over 5 thousand files Do you want to narrow it down by date?					
Created from: 30 Days Ago 💌 🛃 Search					
Modified from: 30 Days Ago 💌 🔚 S <u>e</u> arch					
Accessed from: 30 Days Ago 💌 💽 Se <u>a</u> rch					
✓ I want the full list					
Cancel					



### Category Find

You can now search for files based upon their Category.

				Catego <u>r</u> y	Real Estate	•••
orldox GX4 - Cust	tomize Find Fields	23	<u>N</u> ar	ne/Comment	storage	• 🗉 🔻
ailable Fields:		Active Fields:		Doc ID:		•
ail From	-	Category		wner <u>I</u> nits		•
ail To ail CC	Add <u>B</u> efore ->	Name/Comment Doc ID	D	ate Created		•
Email Addr Date Modifie	Date Created	Da	te <u>M</u> odified		•	
	Date Accessed	Da	te A <u>c</u> cessed		•	
	<- <u>R</u> emove	Profile Group	]	ext in File	agreement	• 3
	<- R <u>e</u> move All	Search What	Pr	ofile Group	<multiple groups="" profile=""></multiple>	
	_			<u>1</u> . Author		•
	<u>O</u> K Car	icel		<u>2</u> . Typist		•
			S	earch <u>W</u> hat	C Active	

🗲 <u>B</u>ack

Clear

Dptions

🔀 Cancel

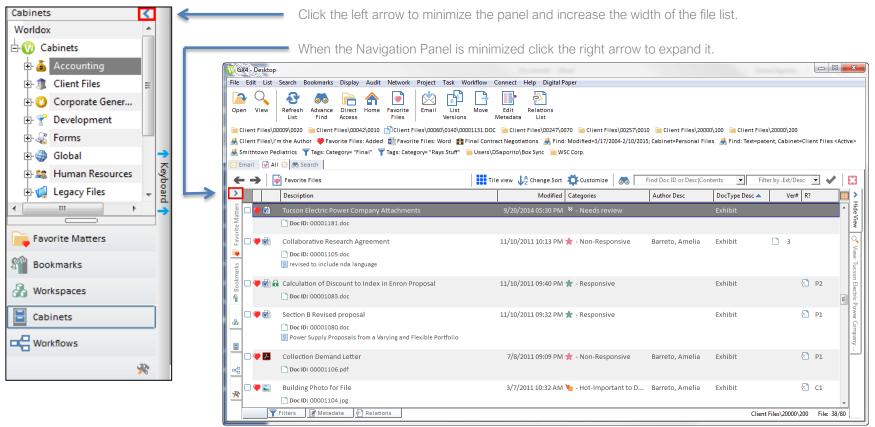
😹 Search



#### Minimizing the Navigation Panel

Increase the amount of space for your Worldox file list by minimizing the Navigation Panel. The minimized Navigation Pane collapses into a vertical bar of buttons that still provides access to your most used folders and views.

By default, the full Navigation Panel is shown.





### Customize the User Interface Theme

Select from three (3) different Interface Styles and choose the icons and color themes you want to see in your Worldox environment.

From the Worldox menu, select **Display** > **Customize** > **Interface**. In the dialog box that appears, select one of the following **Interface Styles**:

- Worldox GX3. This interface uses GX3 button styles. For example, the buttons are rectangular and have a light border.
- Windows 7 (the default view). This interface shows buttons with the rounded look of Microsoft Office 2010. Borders of buttons become dark when selected.
- Windows 8. This interface shows the flat buttons used in Microsoft Office 2013. Button borders are light by default, but become darker once you hover over or click them.

**Note:** Preview how buttons will look in the interface of your choice by clicking the Test me button in the Example section of the **Display > Customize > Interface** dialog.

🕔 Worldox GX4 - Display > Customize > Interface	23
Select Interface Style: 💿 Ć Worldox GX3	
🎥 🔿 Windows 7	
📢 🖲 Windows 8	
Select Icon/Color Theme: 🚫 🔿 Crisp	
📢 🕫 Flat 🔽 Separ	ators
C Tiles Backgro	ound
Example	
Test me 🚺 🔍 🏫 🐼 🜌	
Save dialog style for:	
✓ <u>O</u> K Cancel	

Select the type of **Icons** and **Color Themes** you want to see in Worldox:

- **Crisp** reverts to the type of icons used in Worldox GX3.
- Flat (the default Icon/Color Theme) uses flat vector icons shown in Worldox GX4.
- Separators insert dividing lines between icons.
- **Tiles** uses icons similar to Microsoft Office 2013's tile icons.



#### Customizing the File List

GX4 provides a variety of ways to easily customize fonts, colors and spacing in your file lists. From the Worldox menu, select **Display** > **Customize** > **File List**.

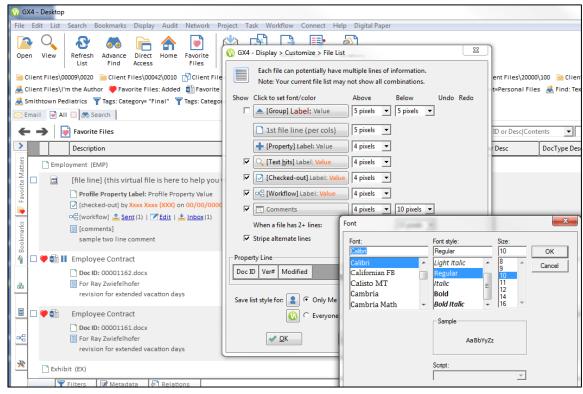
ĺ	Worldox GX4 - Display > Customize > File List	
In the <b>Display &gt;</b>	Each file can potentially have multiple lines of information. Note: Your current file list may not show all combinations.	
Customize > File List	Show Click to set font/color Above Below Undo Redo	
dialog, click a user	Group] Label: Valu	
interface property and change the font or	1st file line (per of inclusion)         Change Label Font         Change Label Color	
color.	+ [Property] Label: Val	
	🗹 🔍 [Text <u>h</u> its] Label: Valu 🛞 C <u>h</u> ange Value Color	Select different pixel
	Checked-out] Label: Value 4 pixels	values to increase or
	C = C = C = C = C = C = C = C = C =	decrease spacing
	Comments 4 pixels V 10 pixels V	between user
	When a file has 2+ lines:	interface items.
	Stripe alternate lines	
	Property Line	
	Ver# Modified Owner	
	Save list style for: 🙎 🕫 Only Me	
	😡 O Everyone	
	✓ <u>O</u> K Apply Cancel	



#### Customize a Font in the File List

In the following example, comments in the file list use the Calibri font. To change them, do the following:

- 1. Select a file in the list.
- From the Worldox menu, select Display > Customize > File List. The Display > Customize > File List dialog appears.
- 3. In the Comments field, left-click and select **Change Font**. Use the Font dialog box to make changes.

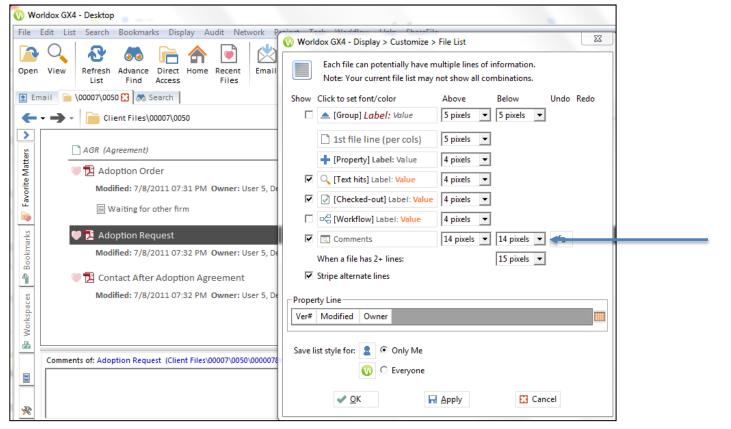




# Customize Margins in the File List

In the following example, more space is created for comments lines in the file list.

- 1. Select a file in the list.
- 2. From the Worldox menu, select **Display** > **Customize** > **File List**. The Display > Customize > File List dialog appears.
- 3. Select a different value for pixels for Above and Below options for Comments.





# Customize a Color in the File List

In the following example, comments in the file list are blue. To change the color, do the following:

- 1. Select a file in the list.
- 2. From the Worldox menu, select **Display** > **Customize** > **File List**. The Display > Customize > File List dialog appears.
- 3. In the Comments field, left-click and select **Change Color**. Use the Color dialog to make changes.

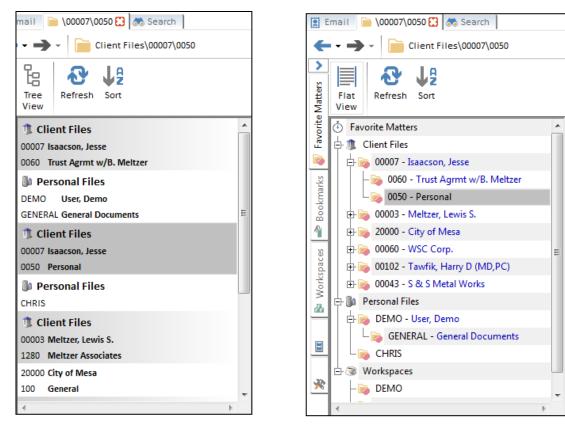
<b>W</b> W	orldox GX4 - Desktop	and the second sec	
File	Edit List Search Bookmarks Display Audit Network P	Worldox GX4 - Display > Customize > File List	
Oper	View       Image: Constraint of the system       Image: Constraint of	Each file can potentially have multiple lines of information. Note: Your current file list may not show all combinations. Show Click to set font/color Above Below Undo Redo	Searci
Favorite Matters	AGR (Agreement) AGR (Agreement) Modified: 7/8/2011 07:31 PM Owner: User 5, De	□       1st file line (per cols)       5 pixels ▼         ↓       [Property] Label: Value       4 pixels ▼         ✓       ○       [Text hits] Label: Value       4 nixels ▼         ✓       ○       [Text hits] Label: Value       4 nixels ▼         ✓       ○       [Color       ○         ✓       [Checked-o       Basic colors:       ○	<u> </u>
a 🏾 🔿 Bookmarks 🦉	<ul> <li>Adoption Request</li> <li>Modified: 7/8/2011 07:32 PM Owner: User 5, De</li> <li>Contact After Adoption Agreement</li> <li>Modified: 7/8/2021 07:32 DM Owner: User 5, De</li> </ul>	When a file has 2  Stripe alternate I	4
🚺 🚺 Workspaces	Modified: 7/8/2011 07:32 PM Owner: User 5, De Comments of: Adoption Request (Client Files\00007\0050\0000078	Ver# Modified Ow Save list style for:	Red: 0 Green: 0 Blue: 174 ors



## List Favorite Matters and Quick Profiles in Tree or Flat Views

In previous versions of Worldox, the Favorite Matters tab in the Navigation Panel showed Worldox, Profile Group name, and Active folder with sub-folders.

In Worldox GX4, you have the option of selecting Tree or Flat views when you view Favorite Matters or Quick Profiles in the Navigation Panel.



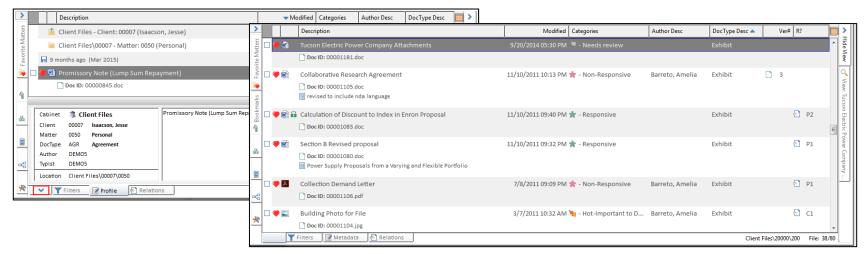


### Full List Tab Has Been Replaced with the Arrow Icon

In previous versions of Worldox, the first tab in the bottom tab bar was named "Full List":

Favorite Matters		Description	Doc ID		Ver#	Modified	Owner	Categories	Туре	
Worldox ^		Sample Client Files - Client: 00247 (Smithtown Pediatrics)								^
Favorite Matters		Sample Client Files\00247 - Matter: 0060 (General)								
Word Files		Modified: 3 years ago (2011)								
e C Active		E Building Damage	00001047.JPG	;		7/14/2011 01:45 PM	DU5		JPG	11
BRENDA - Brenda's Documents		Assessments have not yet been finished.								- 1
CHRIS - Cd's Documents		Floor Plans	00001048.JPG	6		7/14/2011 01:43 PM	DU5		JPG	
DSAPORITO - Donna Saporito		Plans for floors 1 through 5								
EDDIE - Edward Pattison		Re: Revised Emergency Authorities Memo	00000912.MS	G		7/12/2011 11:19 AM	DU5		MSG	
🕀 📔 Legal Hold		🖂 Fw: Tagging issue at NERC Security Subcommittee tom	00000932.MS	G		7/12/2011 11:14 AM	DU5		MSG	
🕀 🌉 Bug List		Re: DRAFT Slides for Sempra Meeting	00000914.MS	G		7/11/2011 05:16 PM	DU5		MSG	
🗄 🦈 Dept Docs		Re: FW: Possible co-sponsorships	00000913.MS	G		7/11/2011 04:58 PM	DU5		MSG	
🕀 🕤 Dept Ray		Standard Hold Harmless Agreement	00001053.DO	С		7/8/2011 08:20 PM	DU5		DOC	
· · · · · · · · · · · · · · · · · · ·		Letter of Business Proposal Workflow: <u>Sent</u> (1)   Z Pending Route: 0 of 0, No r	00000801.DO eplies yet   🔀 E			7/8/2011 07:56 PM	Donna Saporito (DSAPORIT)		DOC	
Favorite Matters	10	Storage Space Lease Options	00001050.DO	с		7/8/2011 07:55 PM	DU5		DOC	11
	10	Expense Report ending guarter	00001051.XLS	5X		7/8/2011 07:53 PM	DU5		XLSX	
Profile Groups		Authorization to School Emergency Medical Treatment	00000792.DO	с		7/8/2011 07:45 PM	DU5		DOC	11
My Computer		Commission Report Submitted by Management Team	00001055.XLS	5		7/7/2011 08:45 PM	DU5		XLS	
		Contingent Fee Retainer Invoice for rent planning	00001054.DO	с		7/7/2011 08:34 PM	DU5		DOC	11
Sources Workspaces		Stock Purchase Redemption Plan 2011	00001049.DO	с		7/7/2011 08:34 PM	DU5		DOC	
C Workflows										-
P %		Full List 🗮 Comments  🛃 Profile 🔍 Viewer 层	Relations	🗊 Pr	oject	😵 Tags 00247			File: 1 o	of 14

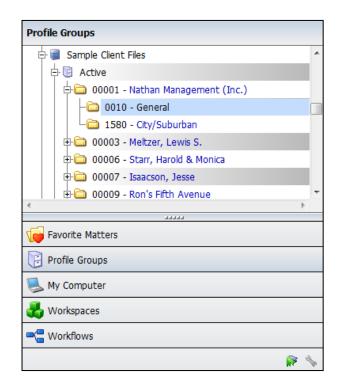
In Worldox GX4, you can simply click an 💽 arrow button next to the bottom tabs to view the full file list.

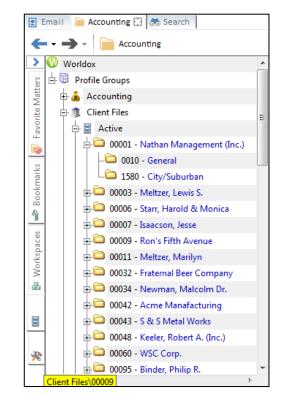




#### Cabinets Folder Tree Has Replaced Profile Groups

In previous versions of Worldox, a Profile Group was a category of profiles (a form used to profile documents). Worldox GX4 now refers to that as a Cabinet. Worldox allows up to 150 different cabinets. For example, you may have one cabinet for administrative documents and another cabinet of documents associated with litigation. Each cabinet utilizes a unique profile form, with a characteristic set of fields. As individual documents are profiled, users first select the cabinet, then use that group's profile form to describe the document.







# Tool Tips for New Methods

Descriptive tool tips pop up when you hover over new options to guide you as you use Worldox GX4.

								ide World
D	escription	After you finish Agreement for a				to add add	itional com	ments. ] ←
() c	abinet	1 Client Files		•			🕒 Copy pr	ofile <u>f</u> rom.
1	Client		•					
2.	Matter		-					
3.	DocType		٠					
4.	Author	WDOXT	€] ▼	Ray Zwiefelho	fer			
5.	Typist	WDOXT	•	Ray Zwiefelho	fer			
5	Categories	Click here to	add 💌					
A 60	Add Security	🖌 🔁 <u>R</u> elate thi	s file to	Save as a	Version	🤎 Save 🛛	efaults	



## Print Security Groups and Walls Information from WDADMIN

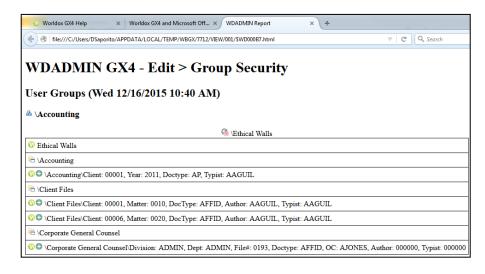
You can now print reports with details about Worldox Security Groups and Ethical Walls.

Launch WDADMIN and select **Edit** > **Group Security**.

Click the **User Groups** or **Ethical Walls** radio buttons. From the Security menu, select **Print**.

A WDADMIN Report is launched in your default Web browser to show details about the Group Security or Ethical Walls you printed.

🛞 WDADMIN GX4 - Edit > Group Securit	у	
Security Edit Items		
Save     Print     Redo     Cose     Cose	🔅 C Features 📓 C Cabinets 🍓 C	Ethical Walls 📔 C Path\Folders
+Create ZEdit XDelete		+Add + Allow Block () Test
Everyone	<ul> <li> <sup>A</sup> User Groups         <sup>A</sup> <sup>A</sup></li></ul>	<ul> <li>Weight Bernard Stress St</li></ul>
- 🛃 Accounting	- 🙎 Users	🕂 🖻 Accounting
- 🛃 Admins	🖻 🌣 Features	🗆 🗌 😡 Client: 00001, Year: 201
– 🛃 Home Office	- Allowed :	🗉 🕂 🕞 Client Files
– 🔏 Simple	- Blocked	- 🗌 😡 Client: 00001, Matter: 0
- 🛃 Support	🕞 🗏 Cabinets	🗌 🕞 😳 Client: 00006, Matter: 0
🖻 💈 Worldox Managers	- C Allowed	🖃 📻 Corporate General Counsel
└ 🛃 Word Processing	- 🔒 Read/Only	🗆 🗌 😡 Division: ADMIN, Dept:
	Blocked	
	Ethical Walls	
		· ·
		<





## Synchronizing a Particular Ethical Wall

With the installation of WDU13 (Worldox update 13), customers may now synchronize a particular ethical wall rather than having to synchronize all of them every time a change is made. **Note:** This feature works if you have Active Directory (AD) Integration turned on.

This, along with the ability to restrict the branch of the AD Directory that is synchronized with Worldox, enables a quicker and more streamlined ability to control access to data.

To use this feature, do the following:

- In WDADMIN, select Edit > Group Security.
- 2. Click the **Ethical Walls** radio button.
- 3. Select an Ethical wall.
- 4. Select Sync Selected Rule(s).

🛞 WDADMIN GX - Edit > Group Security									
Security Edit Items Network									
Save Undo Redo Sync AD	/								
🙆 ் User Groups 🔹 ் Users 🔅 ் Eeat es 📓 ் Cabinets 🚱 ் Ethical Walls 间 ் Path\Folders									
🚱 Ethical Walls	🚰 Add Groups 🙎 Add Users 🗱 Remove 😗 🔒 🚍								
🕇 Add 🗹 Edit 💥 Delete 🍓 Sync Selected Rule(s)	Code 🔺 Name								
no Sthical Walls	AD. Testing) Group2								



## Full Support for Microsoft Office 365 - 2019

Worldox features are fully integrated with Microsoft Office 365.

You can use the following Microsoft Office 365 applications within Worldox:

- Microsoft Word
- Microsoft Excel
- Microsoft PowerPoint
- Microsoft Outlook

For details, please see the Worldox GX4 and Microsoft Office 2013 and 2016 Integration document on the Worldox Knowledge Base:

https://knowledgebase.worldox.com/



# Boolean Symbol Search Logic and AND, OR and Other Search Commands

In Worldox GX4, you can conduct searches using both Boolean symbols and words (logical operators). In previous versions of Worldox you could only search using words such as "AND", "OR" and "NOT".

In GX4 you can also search with the following Boolean operators:

- & = AND combines terms to limit a search
- ! = NOT removes unwanted criteria from a search
- I = OR broadens searches

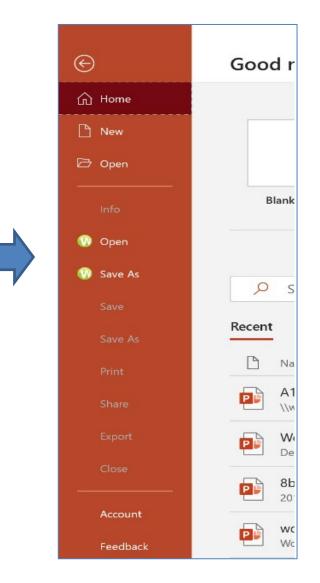
For details, please see the Worldox GX4 Professional User Guide: The Basics on the Worldox Knowledge Base:

https://knowledgebase.worldox.com/



#### PowerPoint Add-in

Worldox now provides an add-in for Microsoft® PowerPoint that delivers the same level of integration that exists for Word and Excel in GX4 Professional. This new integration shows file Descriptions in the caption bar of PowerPoint, It redirects file close of unsaved workspace back to Worldox instead of OneDrive. The Add-in also enhances Version Control of PowerPoint files in Worldox. (For details about Worldox icons in Word and Excel applications, see the GX4 Templates Guide.) This Worldox add-in is compatible with PowerPoint 2016, 365 or 2019.



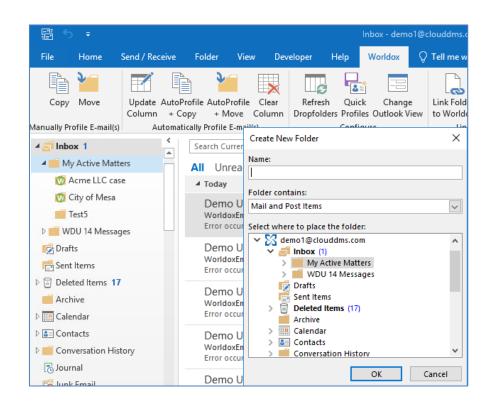


#### Worldox Email Agent

The Worldox Email Agent, available with WDU 14 and later, provides more email capabilities than ever before to accommodate the increasing number of messages stored in Worldox. (**Note:** A minimum of WDU14 is required; however, WDU15 or higher is recommended.)

When installed it will:

- Process Worldox Automatic Drop Folders, so you don't have to wait for them to process.
- Process the new User-Defined Worldox Link Folders or user-created Outlook folders that support Move to Worldox or Copy to Worldox features with pre-defined metadata.
- Add Worldox icon to Outlook folders linked to Worldox
- Add Global Flags to messages already moved or copied
- Process messages without the Worldox Client running - mobile devices, Outlook Web App, etc.



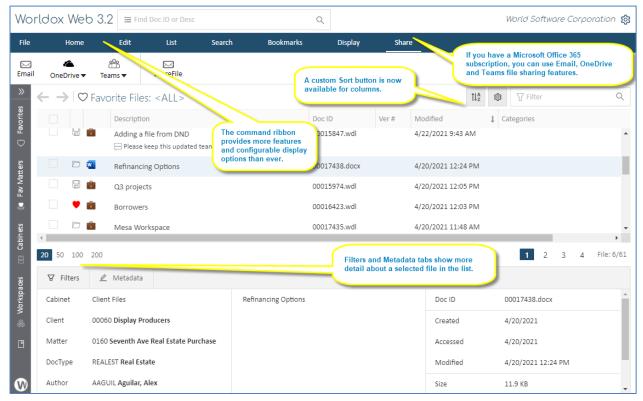


#### Worldox Web Updates

Our latest offering, Worldox Web 3.2, is slated for release May 2021. The continued move for law firms to operate in and out of the office has necessitated digital tools that enable seamless work from anywhere, and Worldox Web 3.2 touts the same secure document management Worldox users are accustomed to while extending the power of your DMS wherever you go.

Worldox Web product is a single solution that provides remote access from a web browser. Our Worldox Web Agent brings the power of Worldox to remote PCs, enabling easy open and save.

Worldox Web 3 is included for all clients, but for Worldox **Professional** or **Enterprise** customers who don't want to invest in a web server, we also offer a Hosted Worldox Web option for a modest monthly fee.



49



### Worldox Web Web 3.2's "Your Recent Work" Dashboard

One of the most notable new features in Worldox Web 3.2' is "Your Recent Work" dashboard. You can configure this view to show Favorites, Fav Matters, Bookmarks and Workspaces in tile or column views. This dashboard is the landing page, but you can return to it from a list page by clicking the Worldox Web 3.2 icon on the upper left side of the screen.

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50



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