

Barron & Young Intellectual Property Limited simplifies review processes and enables visual document tagging with the Worldox Categories feature



*By **Charles Ho**, Principal and U.S. Patent Attorney,
Barron & Young Intellectual Property Limited - June 18th, 2013*

Challenge:

Designate important emails and documents with status types to group, find and circulate them more quickly.

Solution:

Implement the Worldox Categories feature to label files with both text-based and graphical descriptions.

Result:

The firm's employees are quickly trained to use the Categories feature. They assign categories to files upon opening them so that they can easily identify files in lists in a visual way. Icons affiliated with Categories depict which action items are necessary for tagged documents and emails.

The staff members of Barron & Young Intellectual Property Limited in Hong Kong had been using the Worldox document management system (DMS) for several years. They were seeking a way to annotate emails and documents with statuses that indicated, "follow-up", "urgent", "notes to file", and "special instruction from client". Charles Ho, the Principal and U.S. Patent Attorney at Barron & Young, sent an inquiry to his Worldox contact to determine the best way to denote documents with certain conditions. His request inspired the Worldox development team to make enhancements to the long-standing Libraries feature.

The legacy Libraries feature in Worldox was valued by existing customers for many years. Libraries offered folder-based file relations that assisted users with labeling certain documents to facilitate grouping files in a list. Worldox developers decided to redesign the Libraries feature and re-launch it as Categories. The Categories feature makes it possible for users to quickly identify files in a list in a visual way. Color icons and text-based descriptions offer a new way to tag and discover related files.

Users can assign Categories in a number of ways. A common way is to assign them directly from a Worldox file list by right-clicking a file under the "Categories" column header. Upon doing so, a list of categories appears where users can make their selection(s). There is also a menu option to **Assign to Categories** and an optional custom toolbar button for users who prefer those modes. Users can also specify in Worldox Preferences whether or not to assign categories during the operations of Open, Save, Move and Copy if desired. Categories are visible in file lists in the "Categories" column, which can be added if not shown by default. It can also be sorted on or filtered with the Tags tab at the bottom of the file list. Depending on the size of the column, it will always list the Category icon(s) and as much text as possible. Users can assign multiple categories to one file.

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Worldox enables users to create and edit Public, Personal and Folder-based Categories. The Folder categories are the same as the old folder-based ones that were offered in the Libraries feature. These Categories are only viewed within the specified folder. Users can create Personal categories that only they can see. Public categories are used globally by all users within the organization using Worldox.

Upon learning about the new Categories feature, the IT department at Barron & Young rolled it out to users within just a few days. Staff members were quickly trained to use it and they immediately created additional useful categories. Supervisors improved their review process by marking documents and emails with categories such as “to be reviewed”, “reviewed”, “approved”, “ready to be sent” and “sent to client”.

Users of the Categories feature at Barron & Young are diverse when it comes to preferences for the types of Categories to use. Some prefer to use only existing Public or Folder-based categories, while others also employ Personal ones. One thing they all agree on is that categories provide more advantages when it comes to locating documents in a file list with a quick glance. All users have their Worldox Preferences set so that they can select a category upon opening a file. They also use the Tags tab at the bottom of the Worldox file list so they can click a Category name to display matching results in the file list.

Worldox users at Barron & Young unanimously agree that the Categories feature has streamlined the process of cataloging their documents. It’s an easy way to tag documents and emails to more easily circulate them for review and collaboration. Icons designated to categories assist with illustrating tasks and action items that have already been performed or still need to be done for certain documents and emails. Categories have been a welcome addition to the workflow at Barron & Young. They have made review processes more efficient and have met the expectations of Worldox end users throughout the firm.

Charles Ho affirms, “We find Worldox very useful and indispensable in our daily document management as it possesses the unique Categories feature. It allows us to quickly obtain the most updated status of each document and email saved in Worldox, so that we would know which ones we need to follow up with and which ones we need to handle immediately.”