Worldox GX4 Overview

2018

Worldox

What's New in Worldox GX4

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

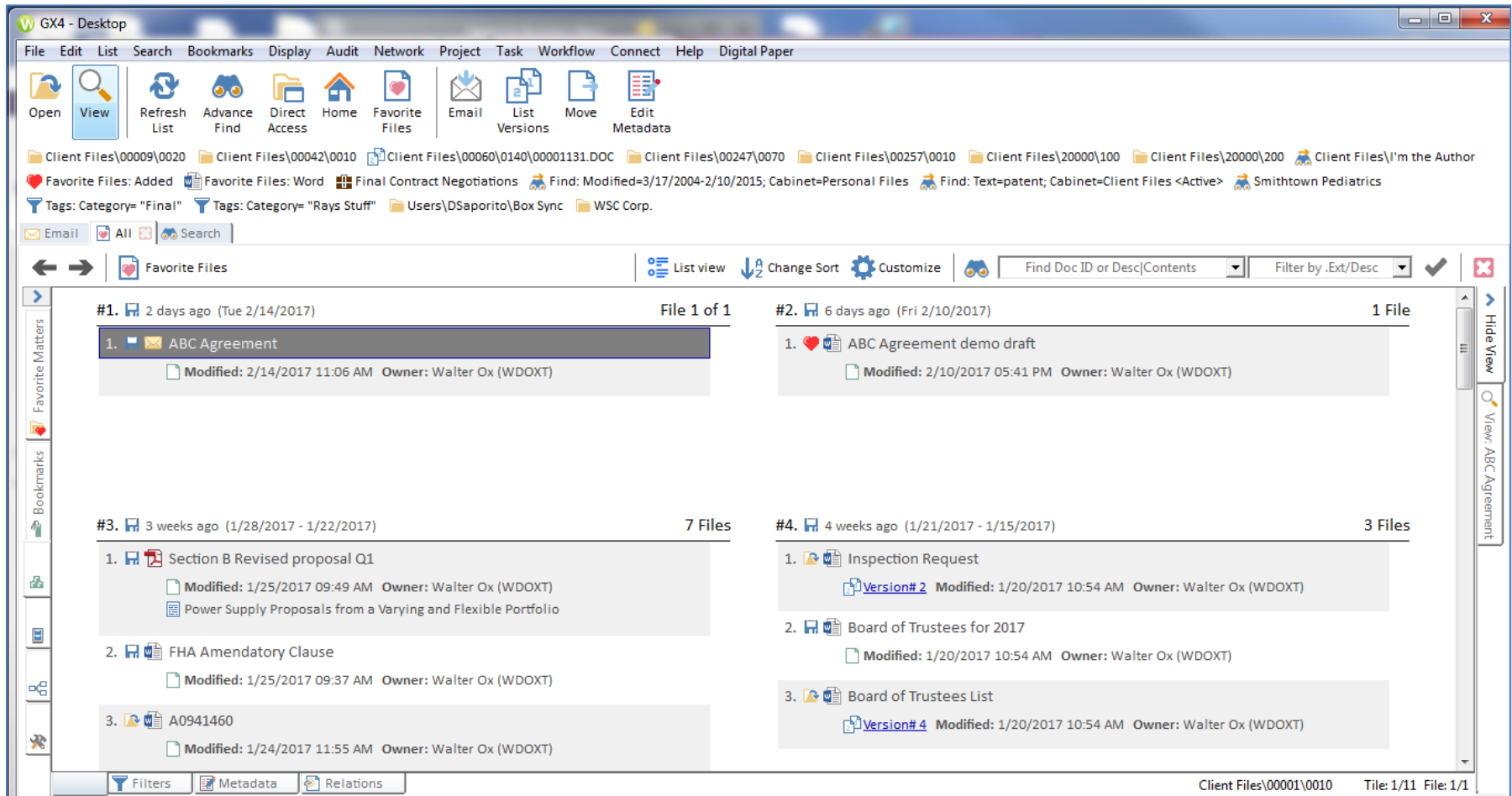**1. Ease of Use**

2. 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.

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.
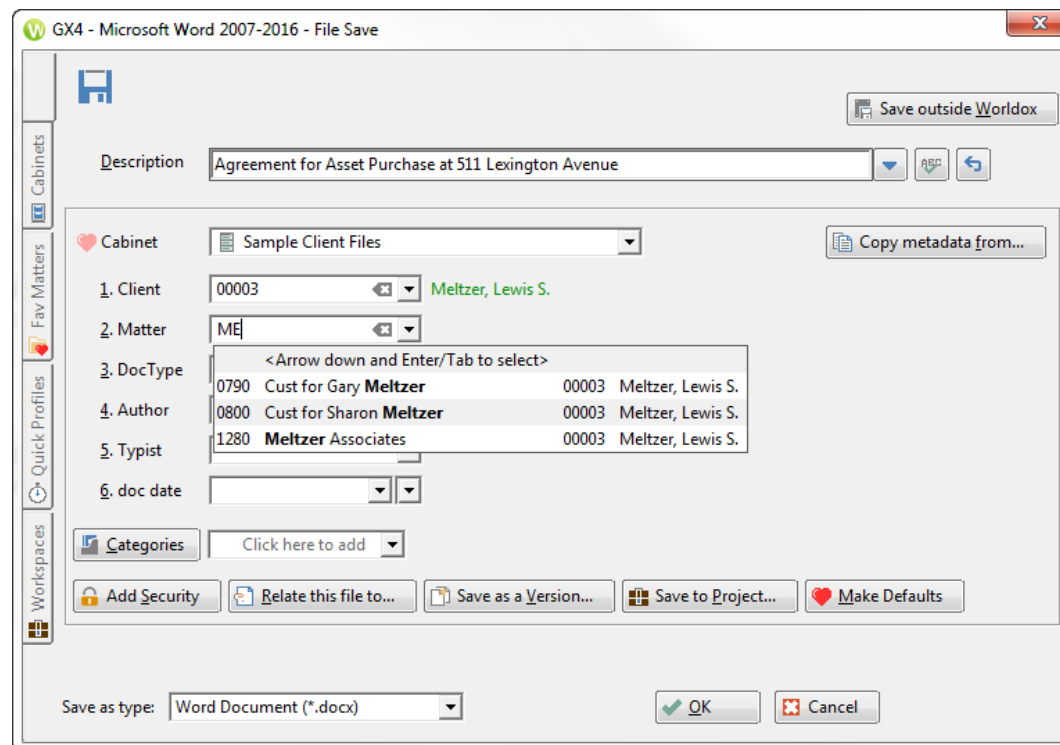
Enhanced Search Capabilities

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.
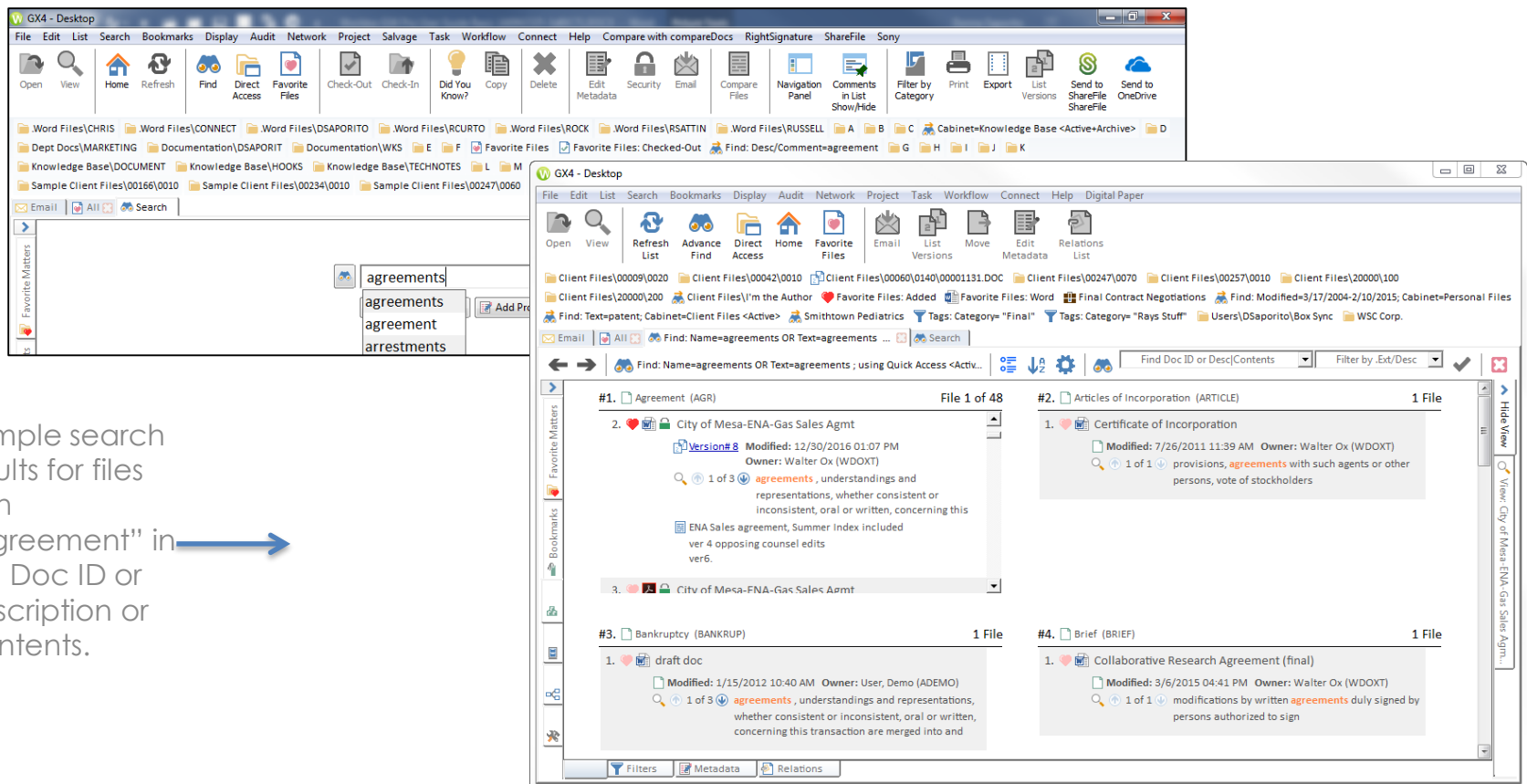
Sample search results for files with "agreement" in the Doc ID or Description or Contents.

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.
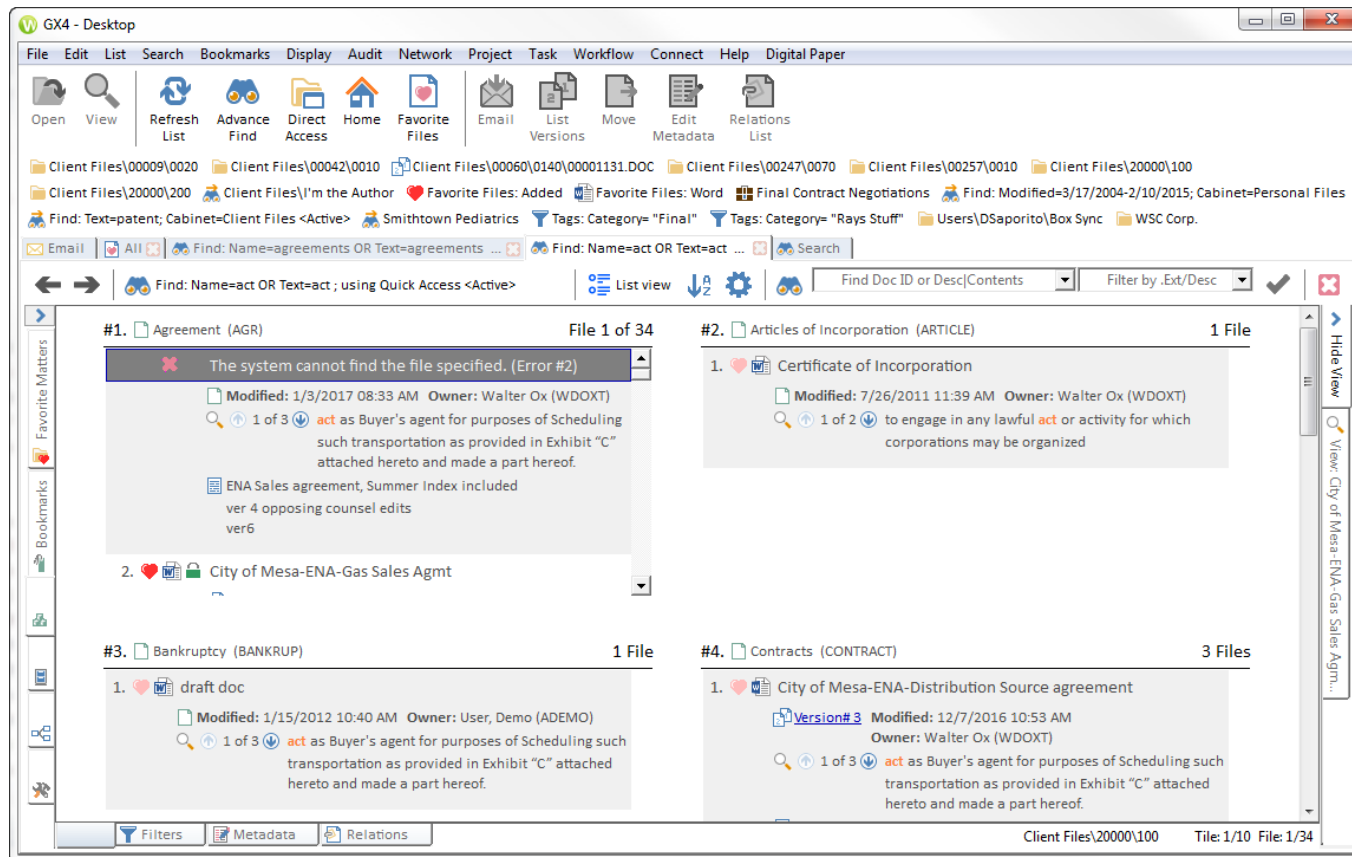
Search for Doc ID or Description/Contents

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.
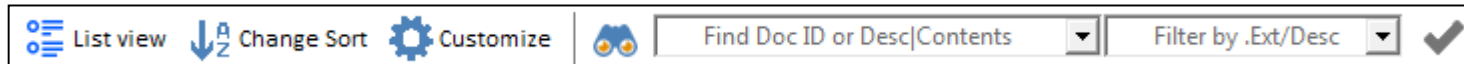
The file list or tile view displays files that match the search criteria.

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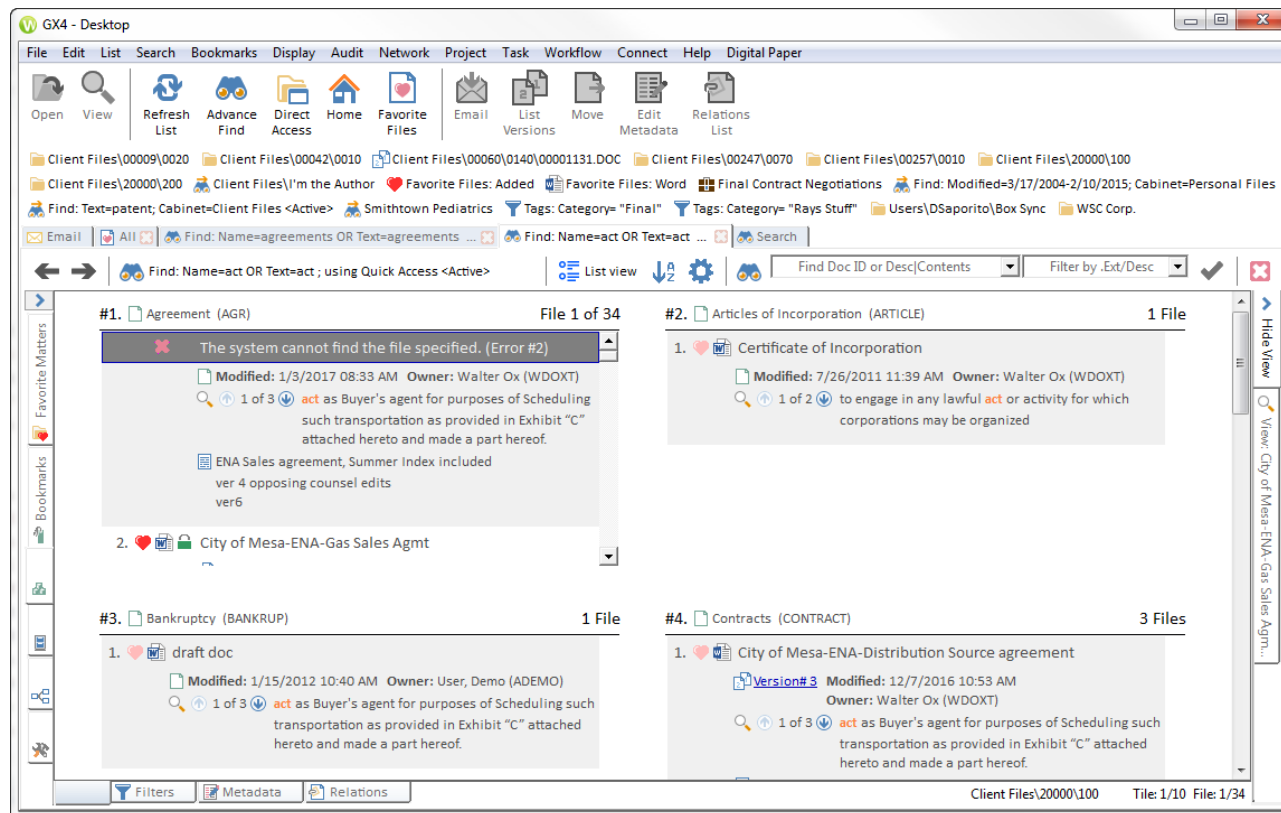The Search tab's field box displays the name of the cabinet you want to search.
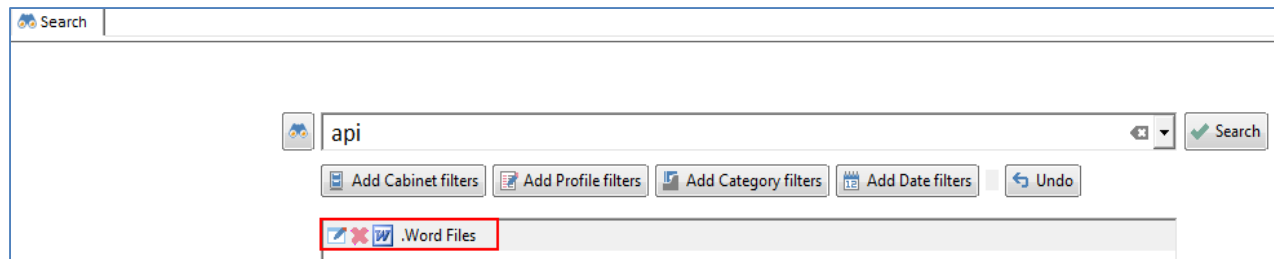
You can combine Cabinet, Profile, Category and Date filters to further narrow your search.
Note: There is only one limitation for searching more than one cabinet if you add a profile field. See *A Limitation when using Search Tab Filter Buttons* in the *Worldox GX4 Professional User Guide: The Basics*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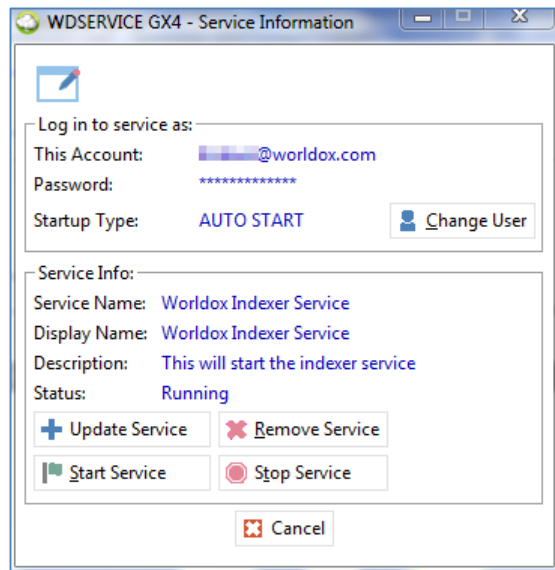
WDSLAUNCHER
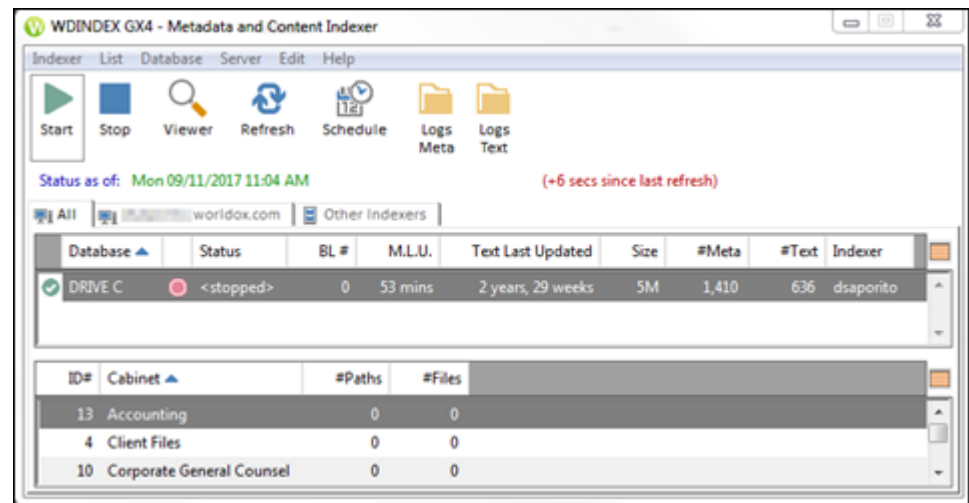
Worldox Indexer Console

Executive Tile/Grid or List Views

In the file list view, click the Switch to Tile View [Switch to tile view] button or select **Display** > **File View** > **Tiles** to view profile information for files in a grid view rather 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.
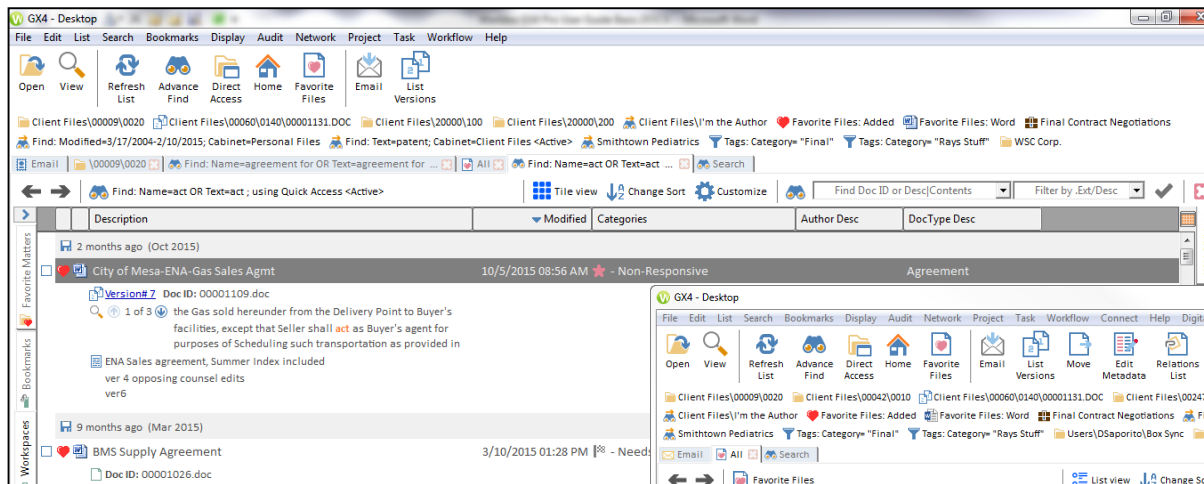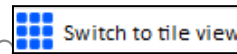
List view

Tile view
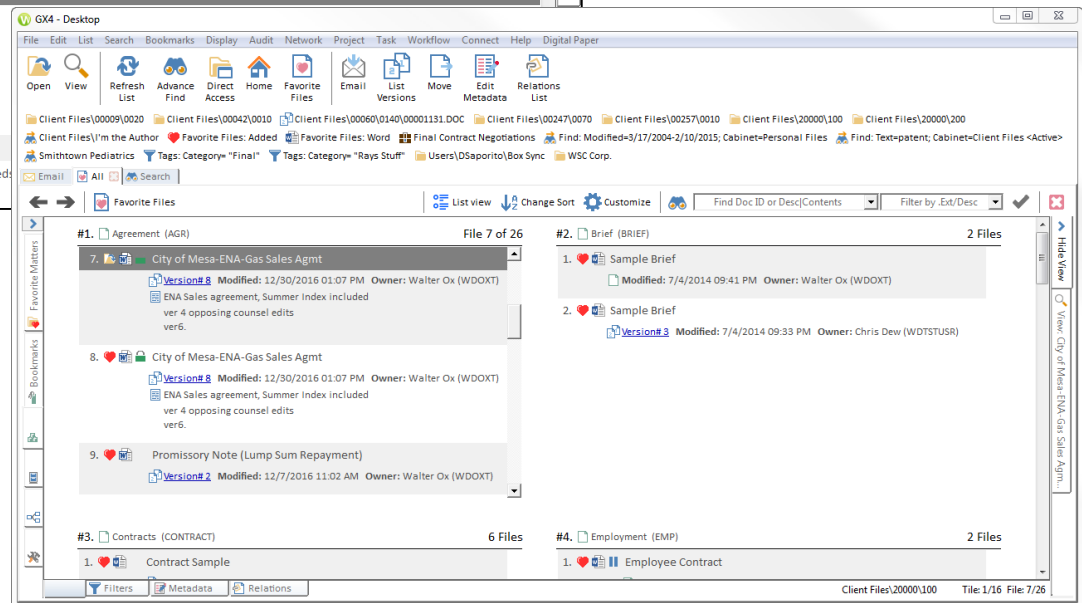
Tile View Layout

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.

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.
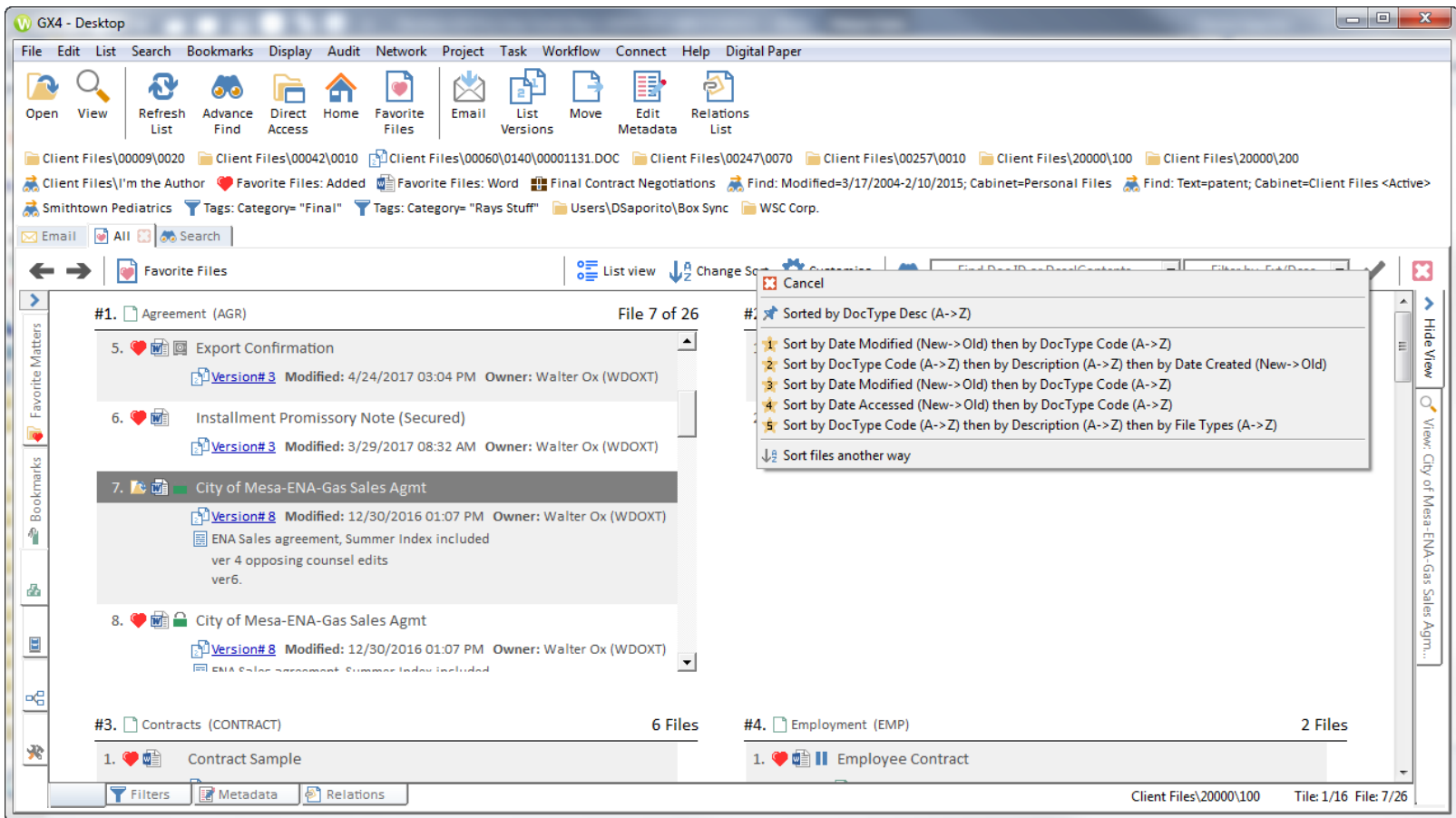
Microsoft Outlook Drop Folders now Automatically Correlate with Favorite Matters

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.
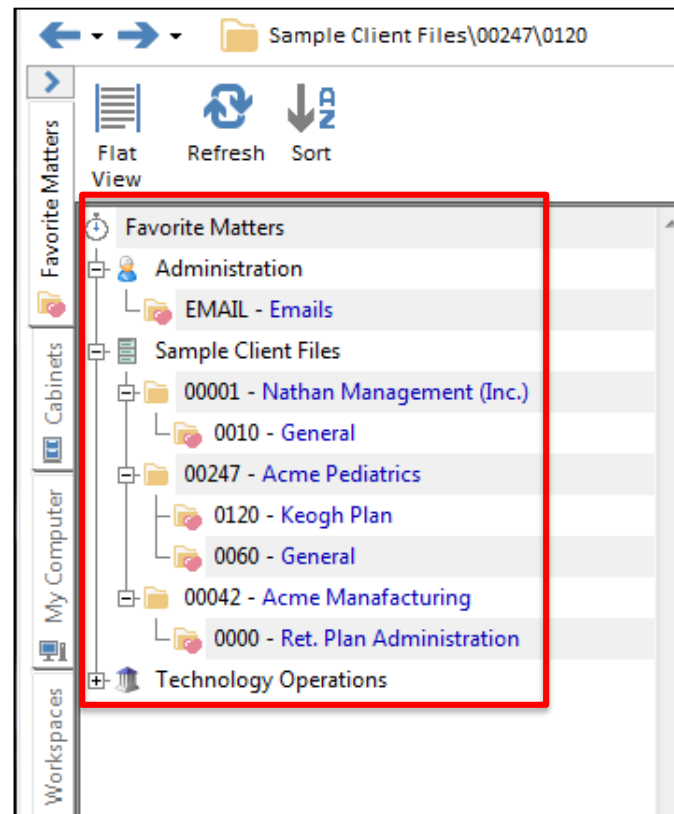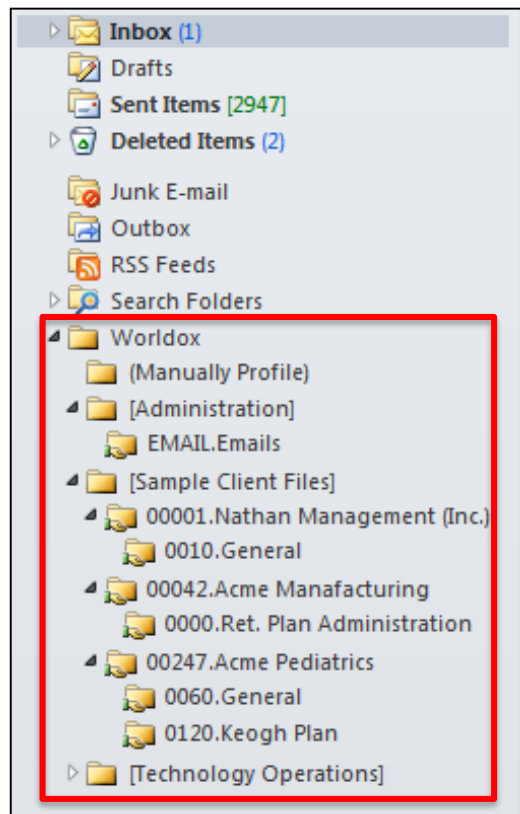
Drop Folder Naming

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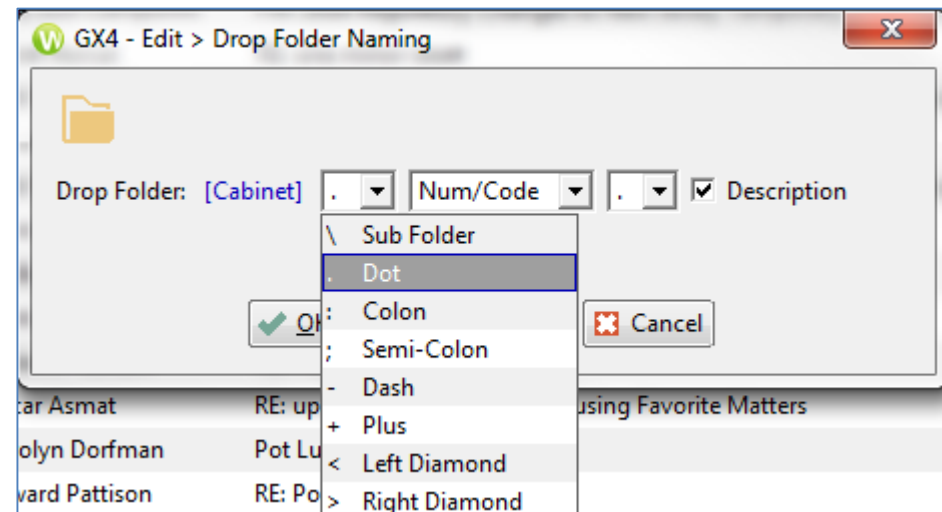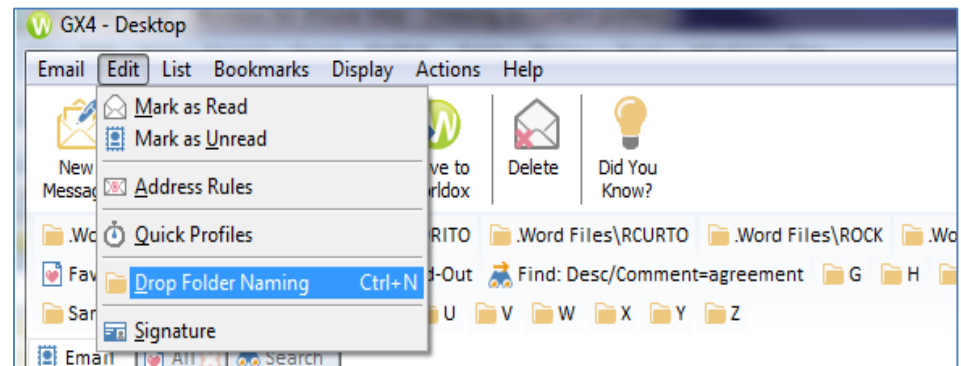
In this example, the Description has been de-selected. Note that the second drop-down list of characters is removed from the dialog.

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.
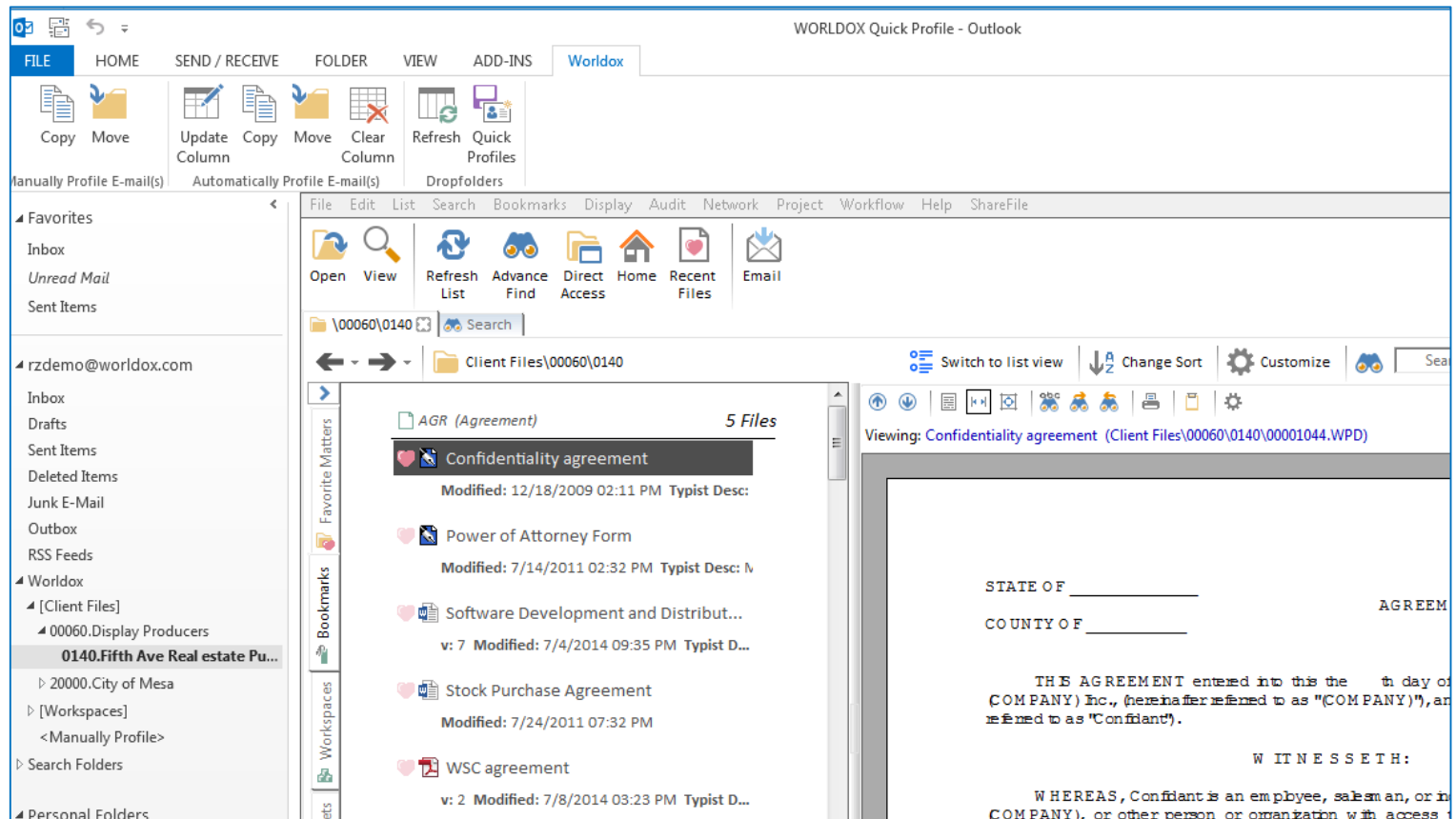
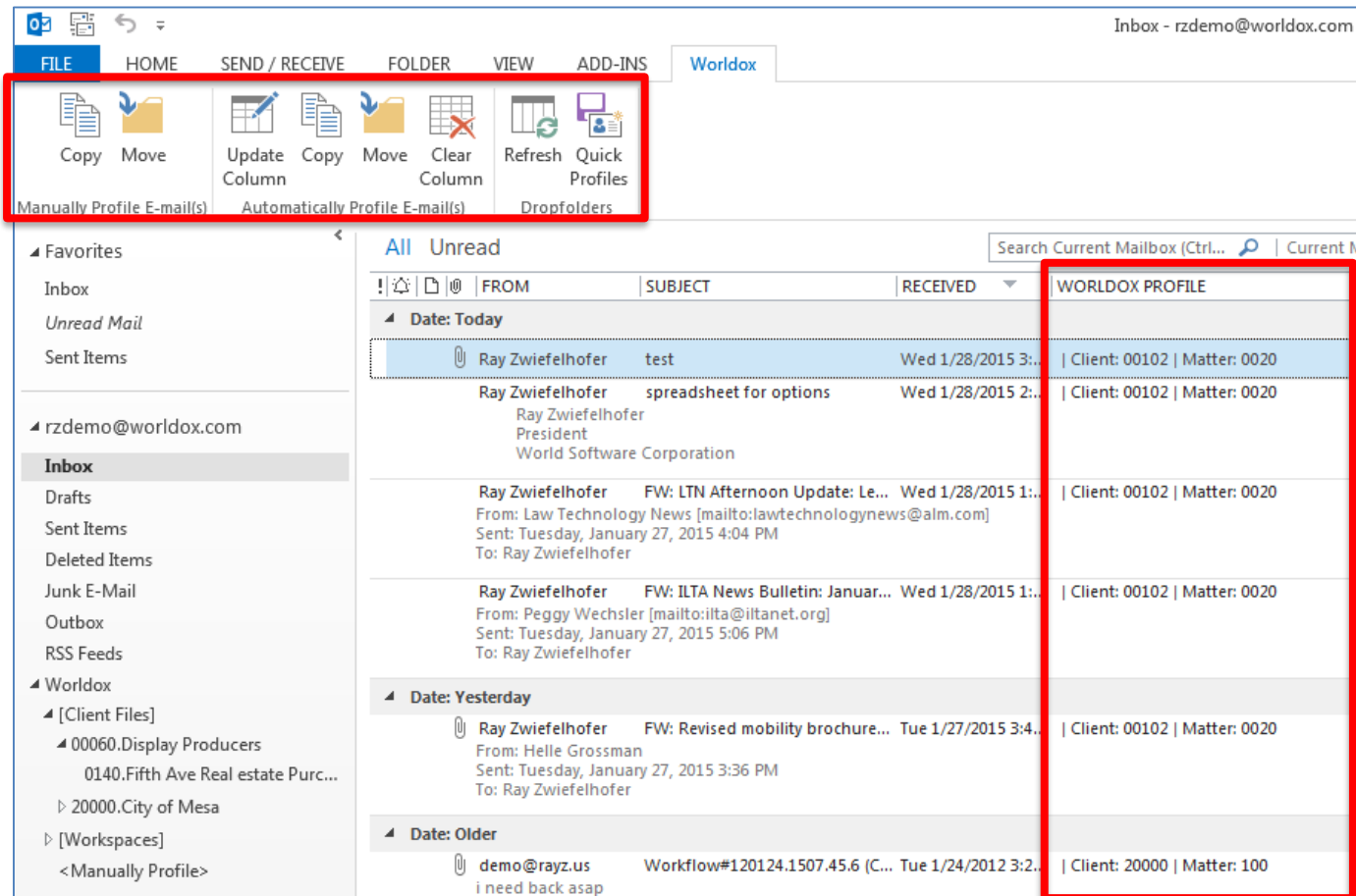# Microsoft Outlook 'Active Profiling'

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

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.

WD-QuickSave button in Microsoft Office
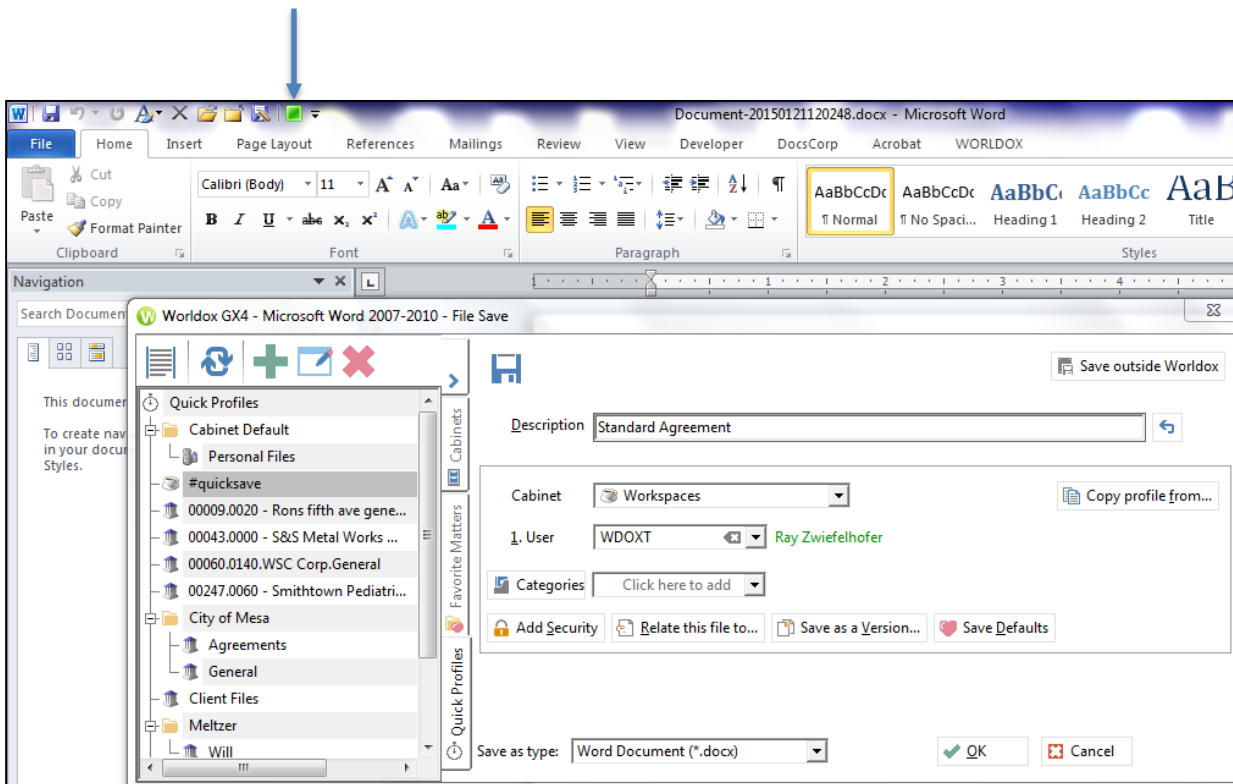
WD-QuickSave button in Adobe Reader
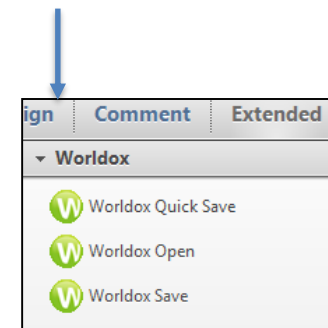
QuickSave One-click Save

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.
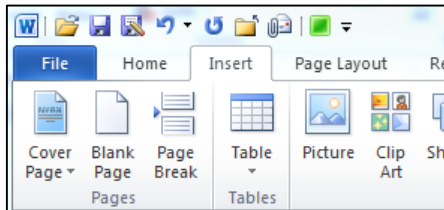
Word 2007-2010
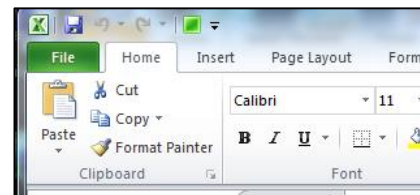
Excel 2007-2010
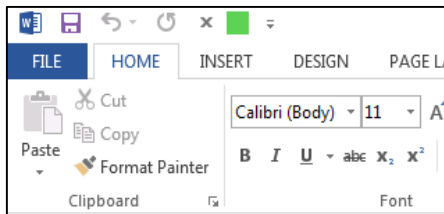
Word 2013

Excel 2013
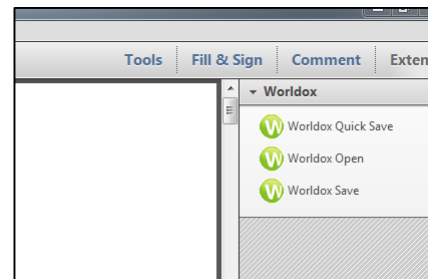
Adobe Reader

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
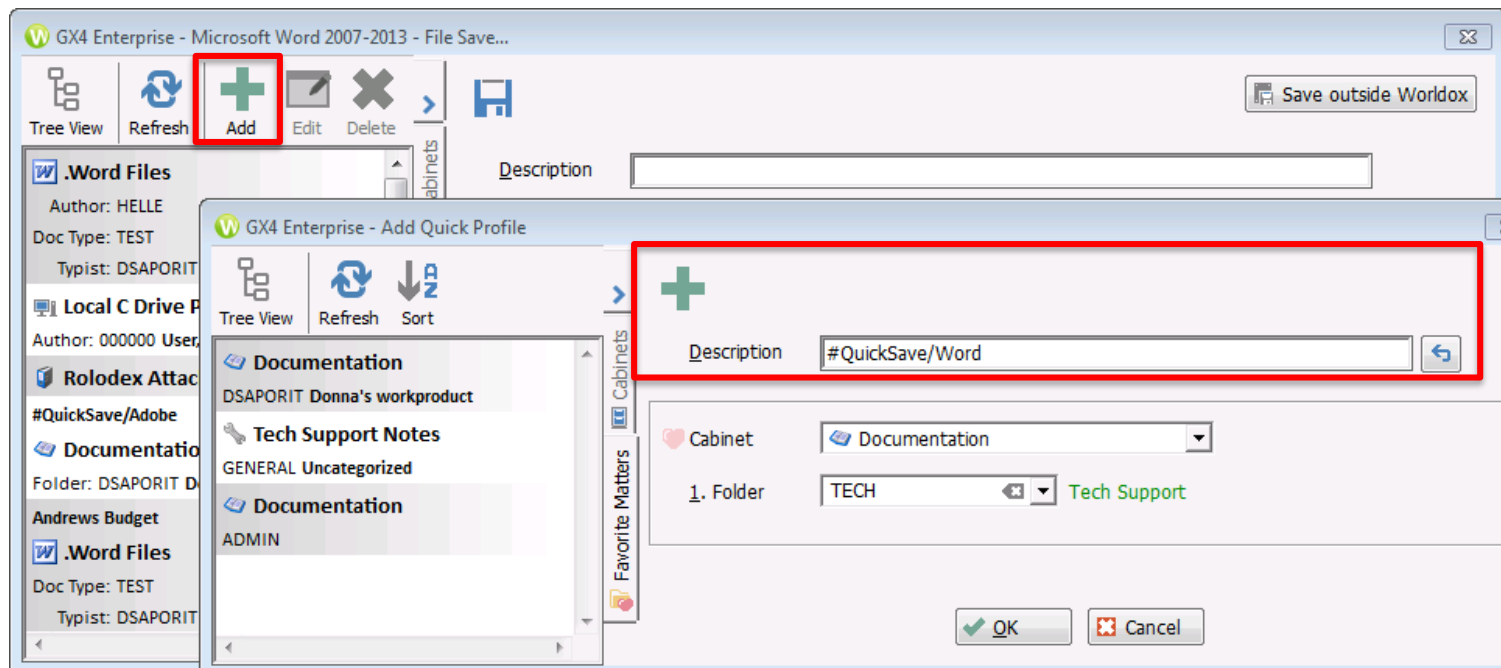
Redesigned Toolbar to Quickly Perform Searches within Word and Excel
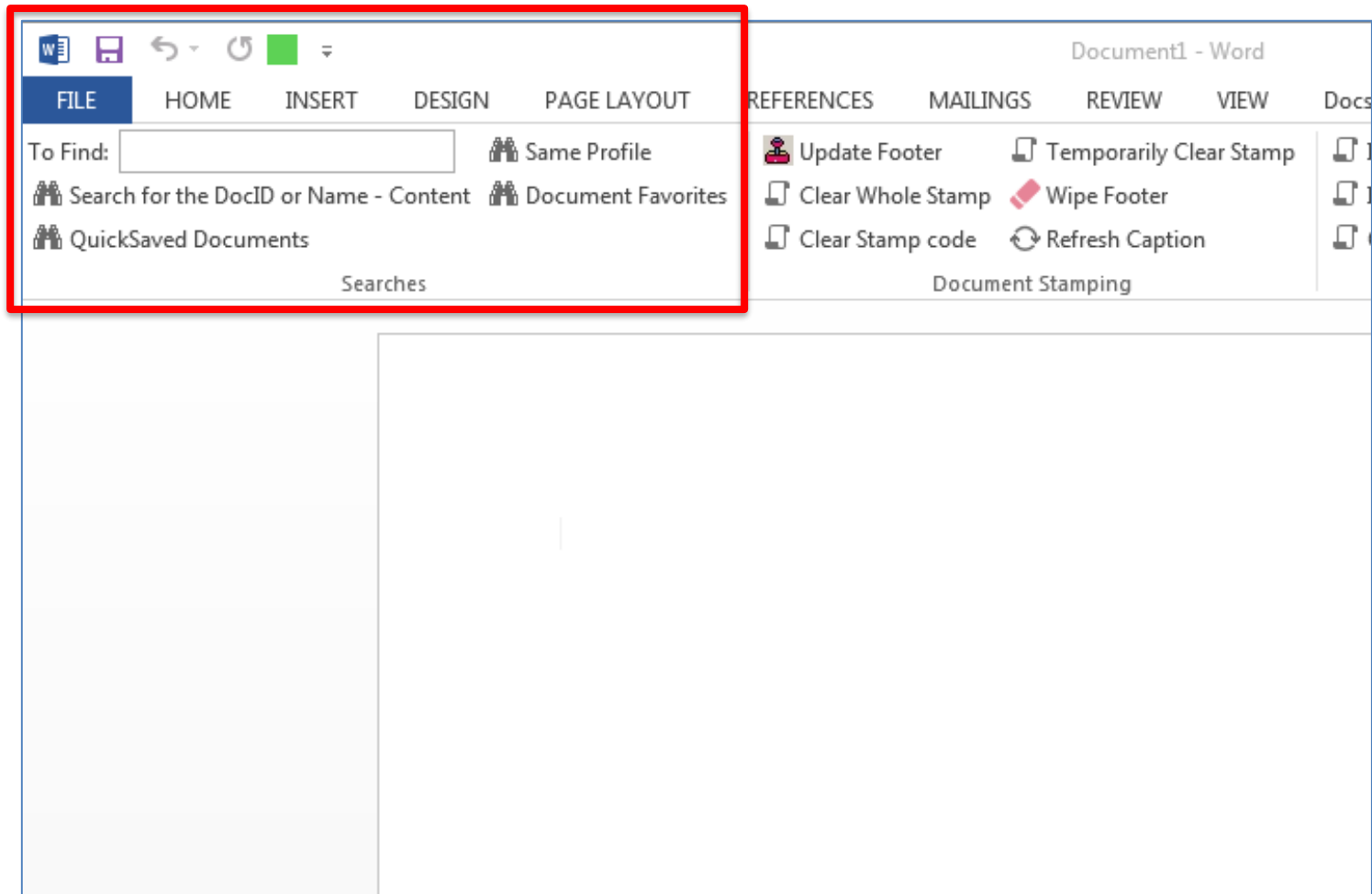
Selecting One-click Favorites within the New, Streamlined Interface

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

In the List > Selected Favorites dialog, you can select file types to filter in order to view selected files in the list or tile view.

Unclick a heart 💜 icon next to a file if you no longer want it to appear as a Favorite.
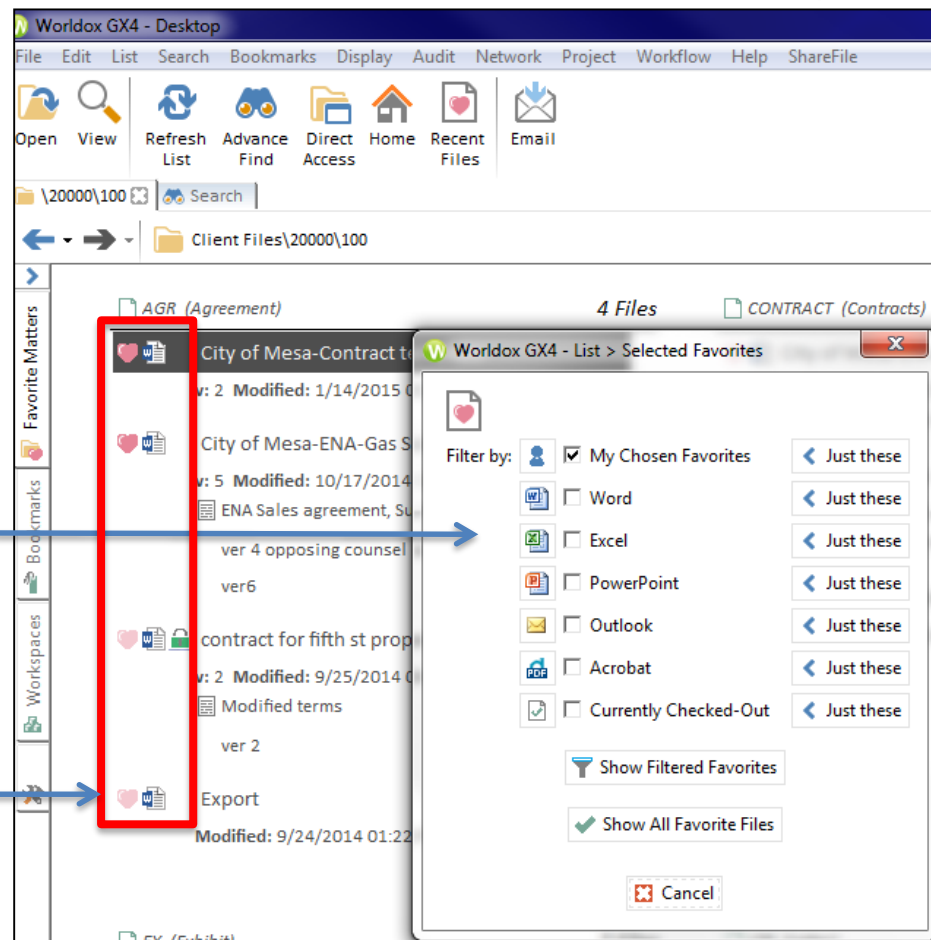
Reorganized File Save Dialog

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.

Save files outside of Worldox by launching the native save dialog for the program you are running.

Fly out quick save menus

File descriptions and comments are combined into one field. Simply press the Enter or Return key after you finish typing your description to add comments.

Field inline adding of categories

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** ↩ to make changes if necessary.
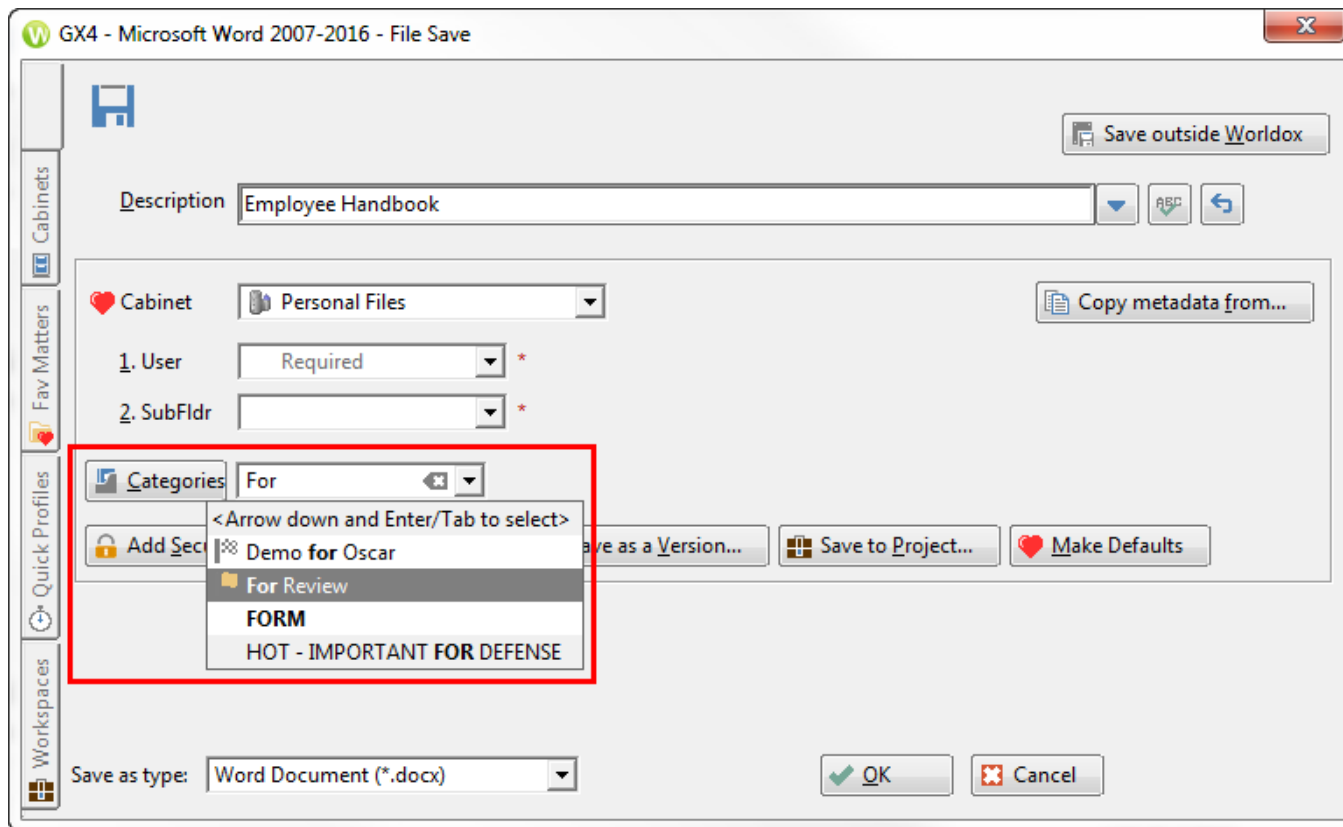
Edit Security, Relations, Versions, Projects and Defaults from the File Save Dialog

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.
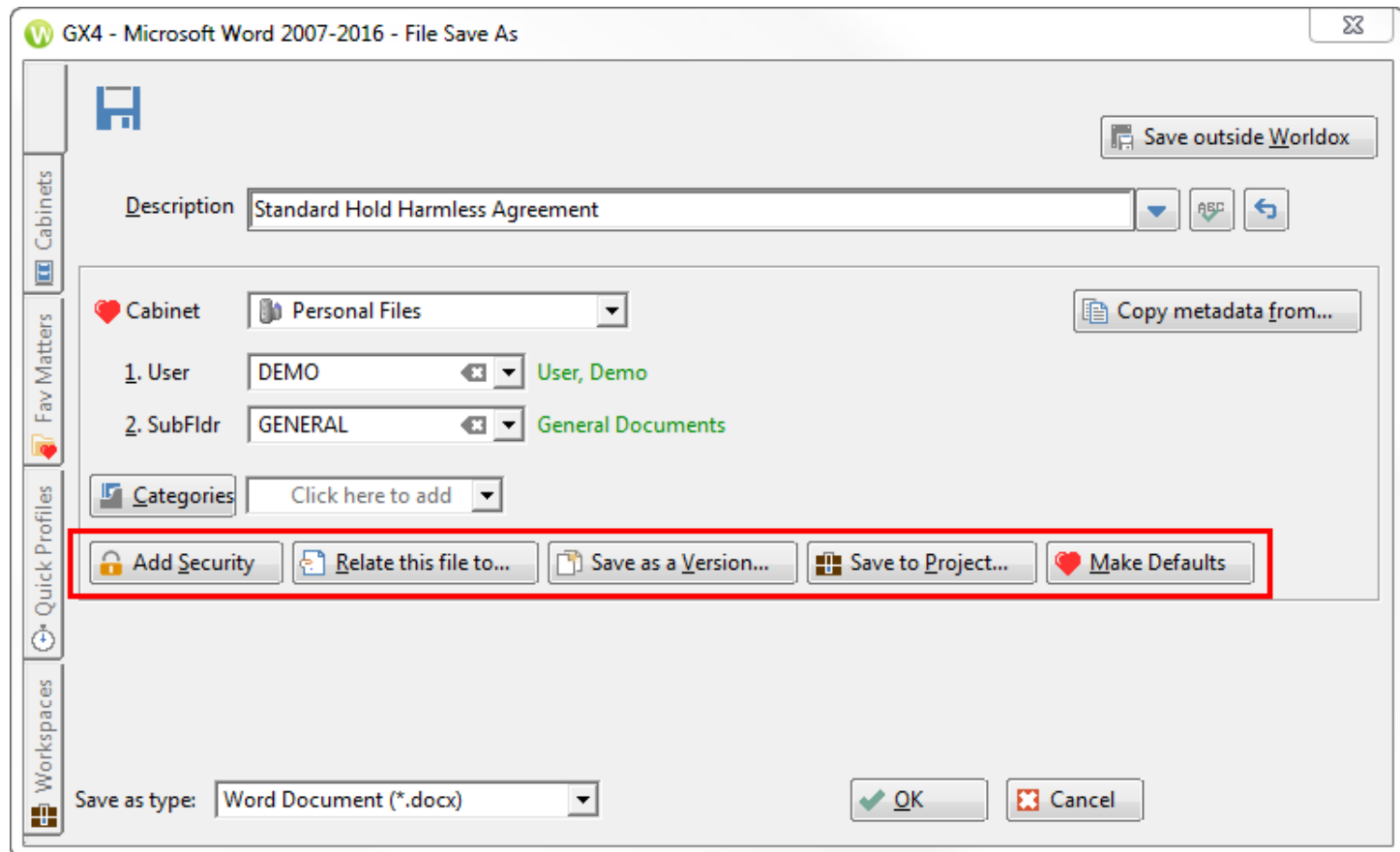
Follow Me Favorites

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.
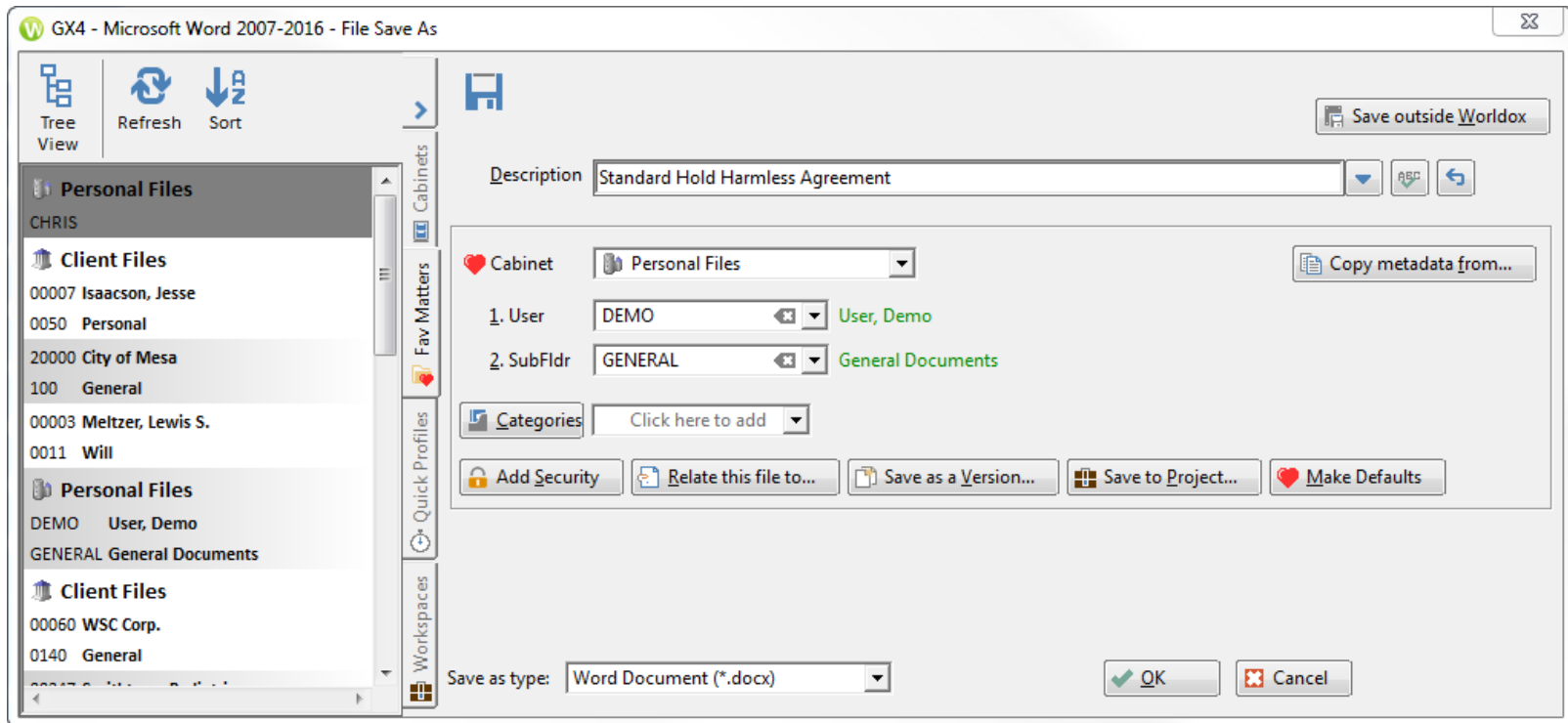
Workspaces on File Save

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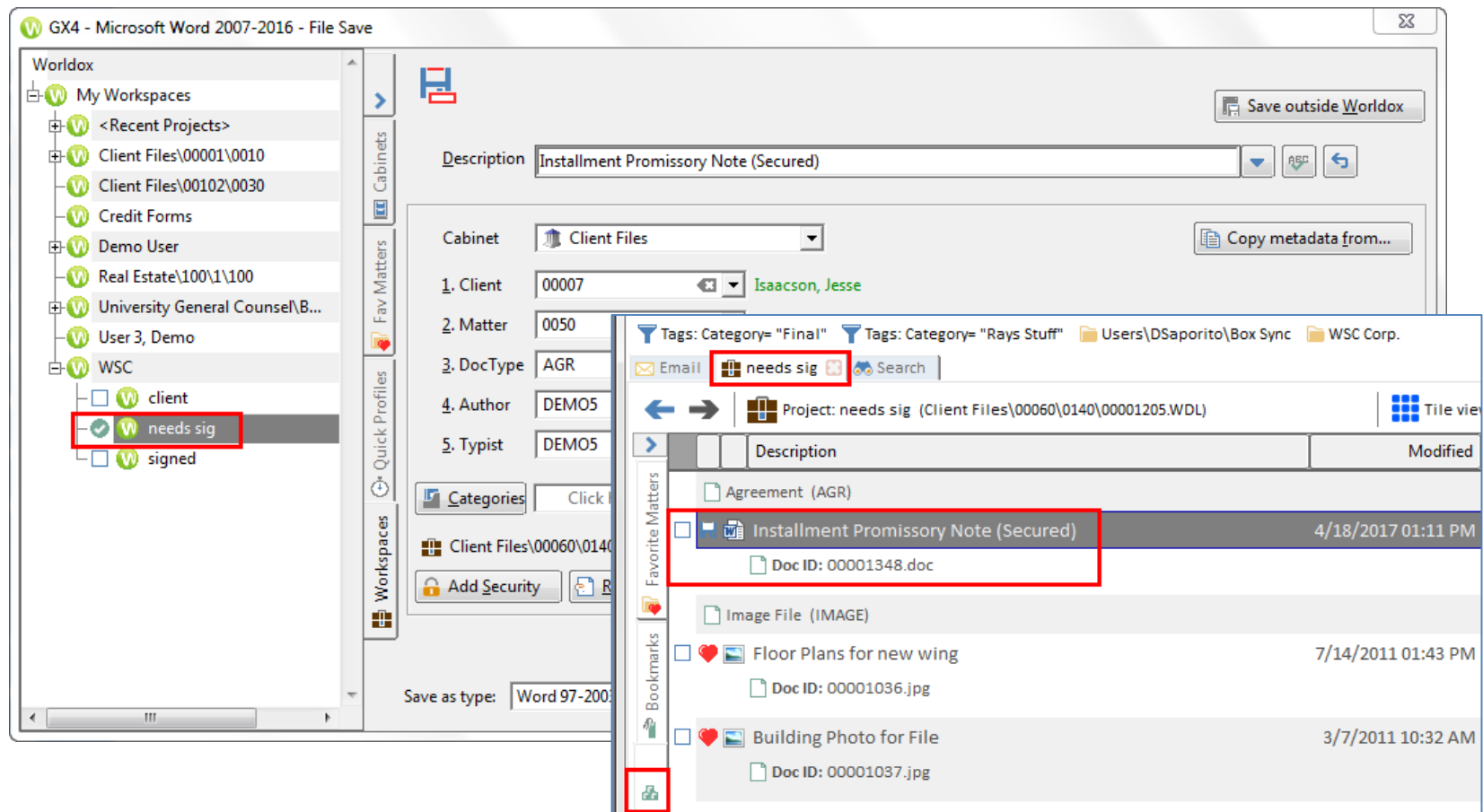
Save to Project on File Save

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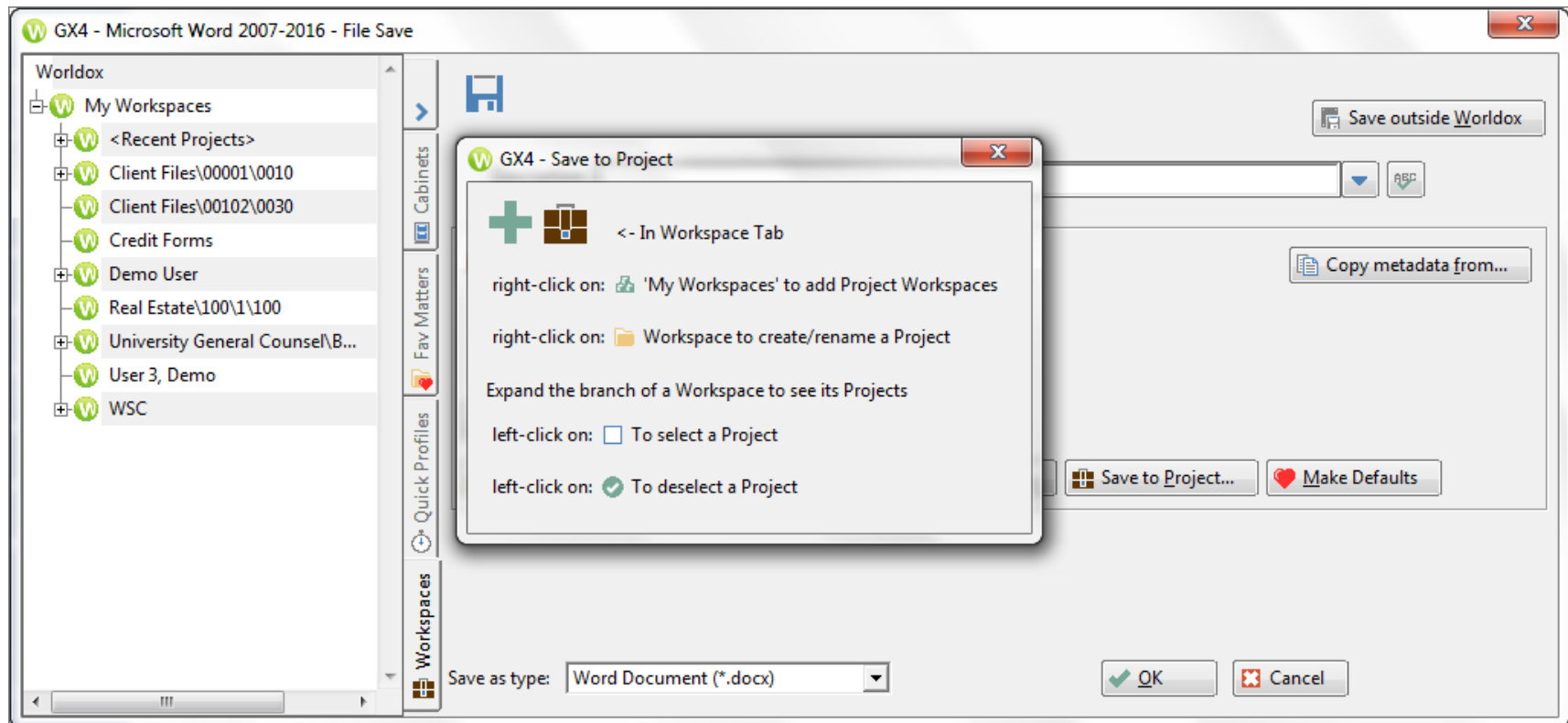
Worldox Ribbon: Quick Profiles, Favorite Matters and Make PDF Options

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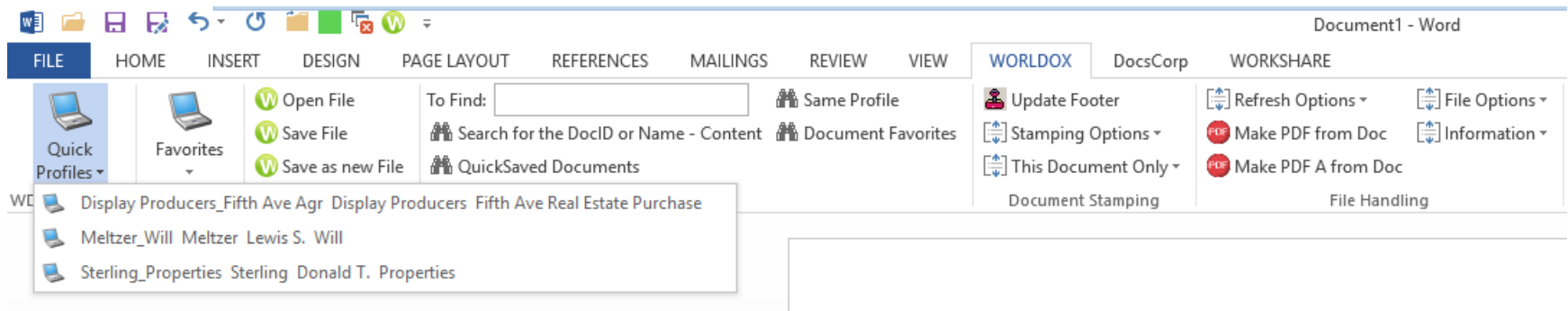
The additions of Quick Profiles and Favorites to the Worldox ribbon bar leverage Worldox GX4's Active Profiling and Follow Me Favorites technology, which tracks the files you worked on recently and presents choices for quick filing and navigation.

Intelligent Find

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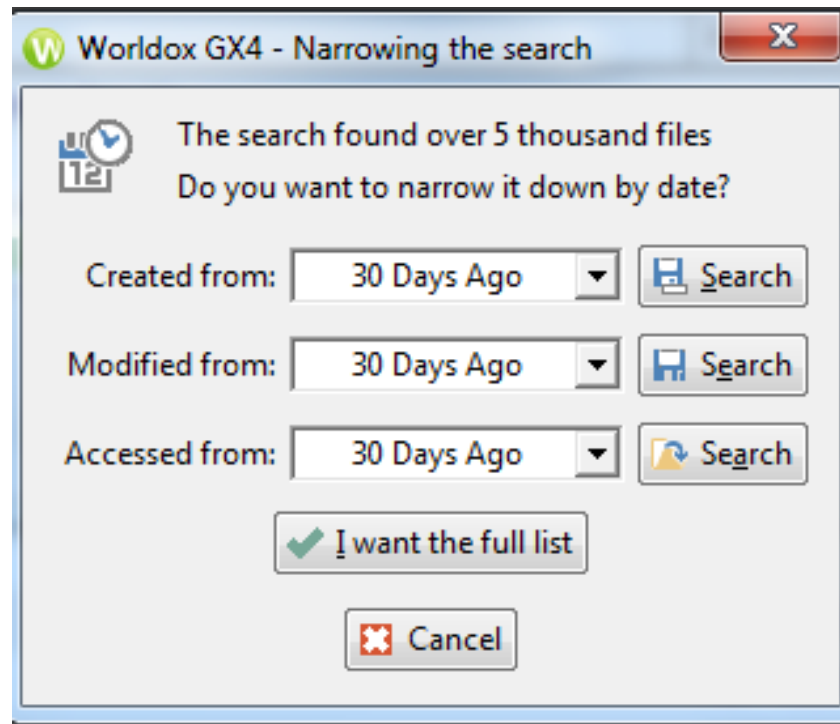
Category Find

You can now search for files based upon their Category.
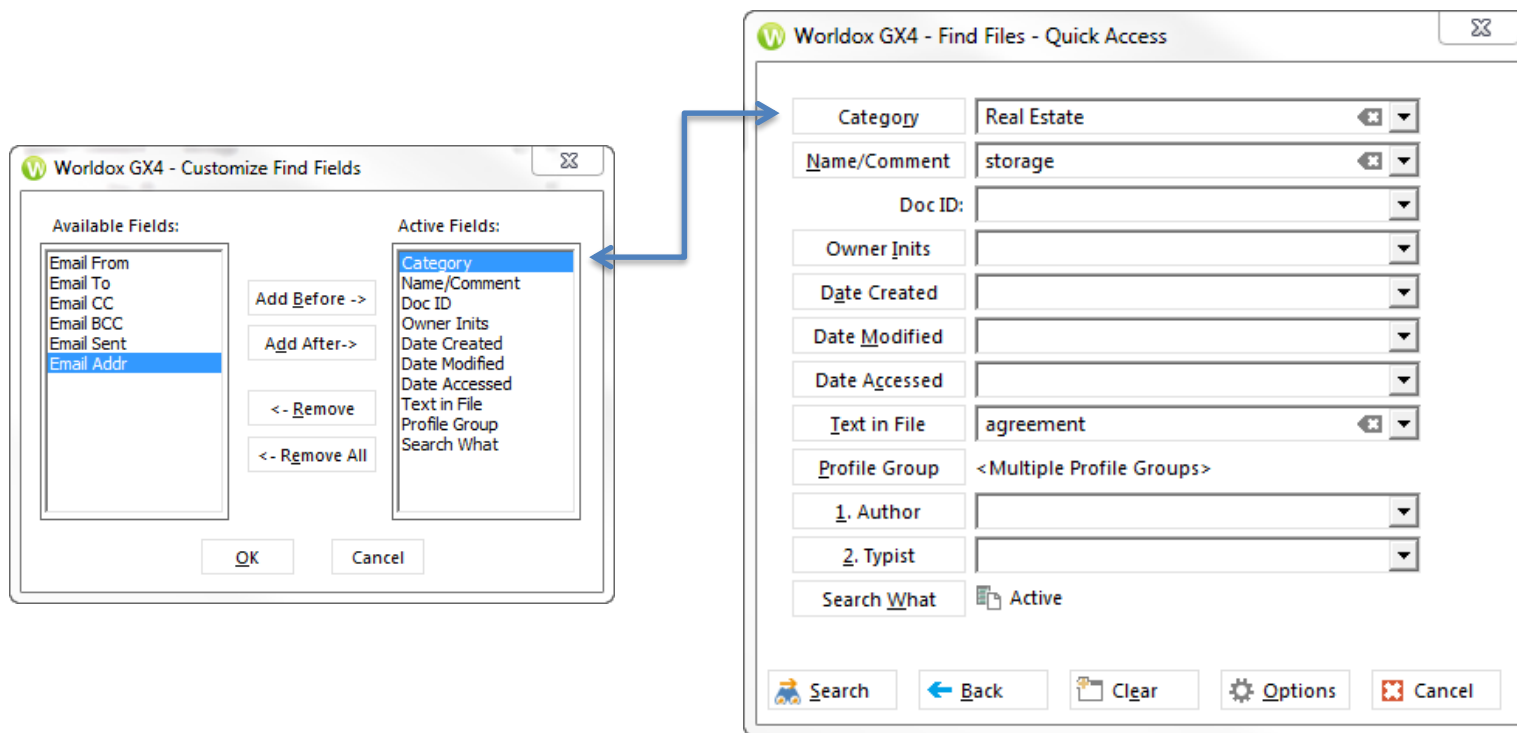
Minimizing the Navigation Panel

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.
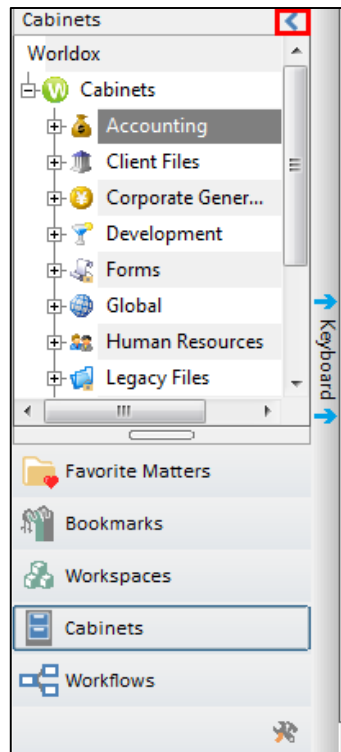
Click the left arrow to minimize the panel and increase the width of the file list.

When the Navigation Panel is minimized click the right arrow to expand it.
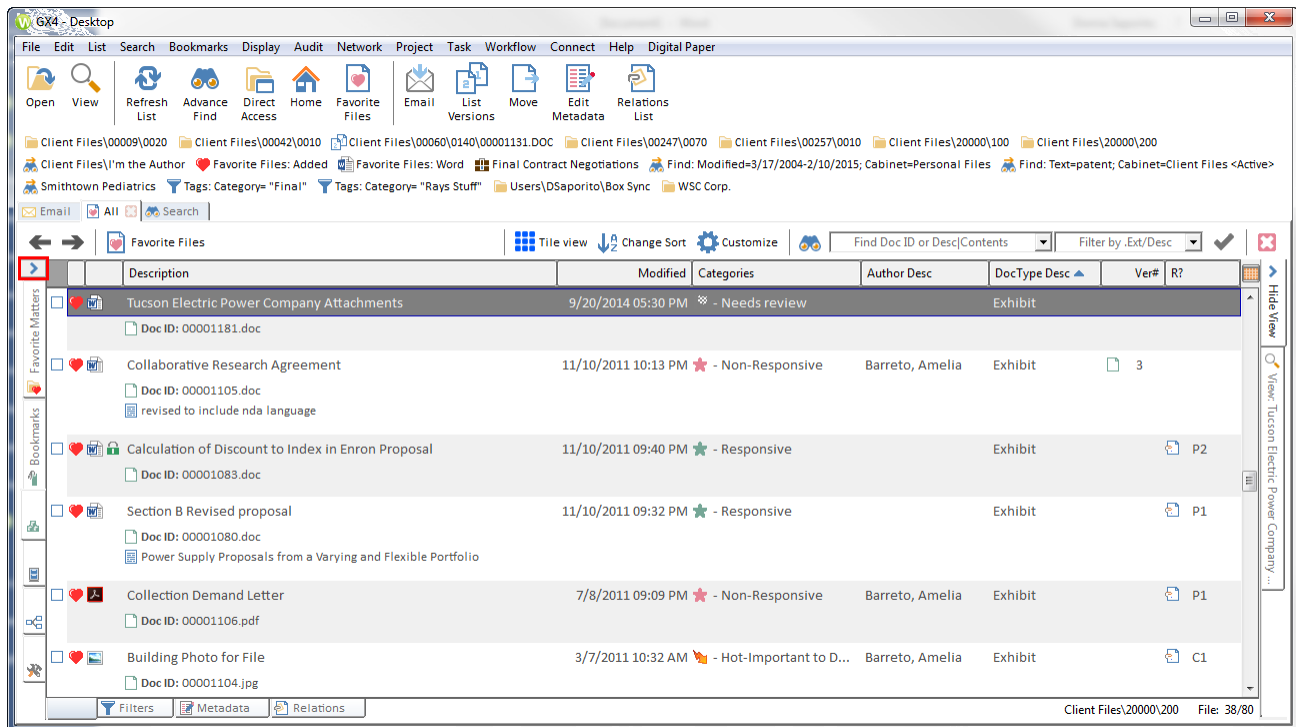
Customize the User Interface Theme

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.
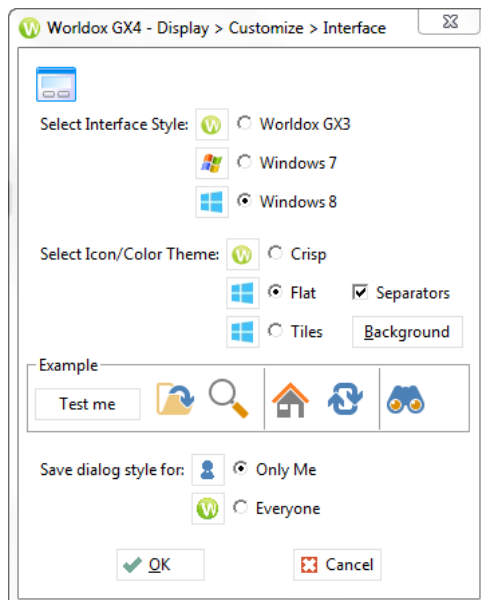
Select the type of **Icons** and **Color Themes** you want to see in Worldox:
- **Crisp** reverts to the type of icons used in Worldox GX3.
- **Flat** (the default Icon/Color Theme) uses flat vector icons shown in Worldox GX4.
- **Separators** insert dividing lines between icons.
- **Tiles** uses icons 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**.

In the **Display > Customize > File List** dialog, click a user interface property and change the font or color.
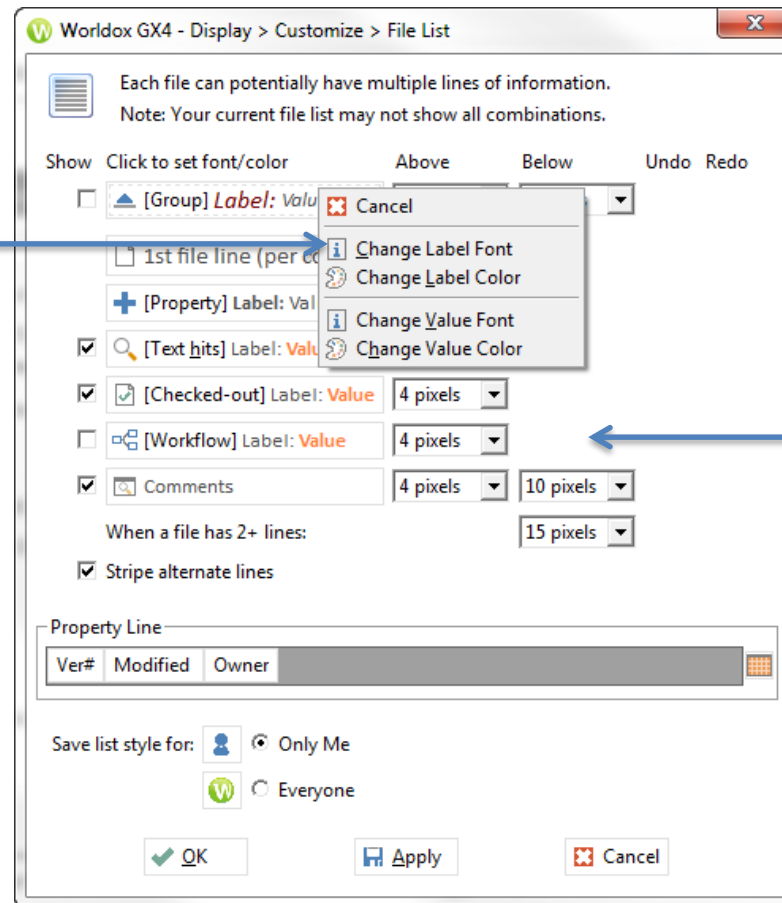
Select different pixel values to increase or decrease spacing between user interface items.

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.
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 Font**. Use the Font dialog box to make changes.
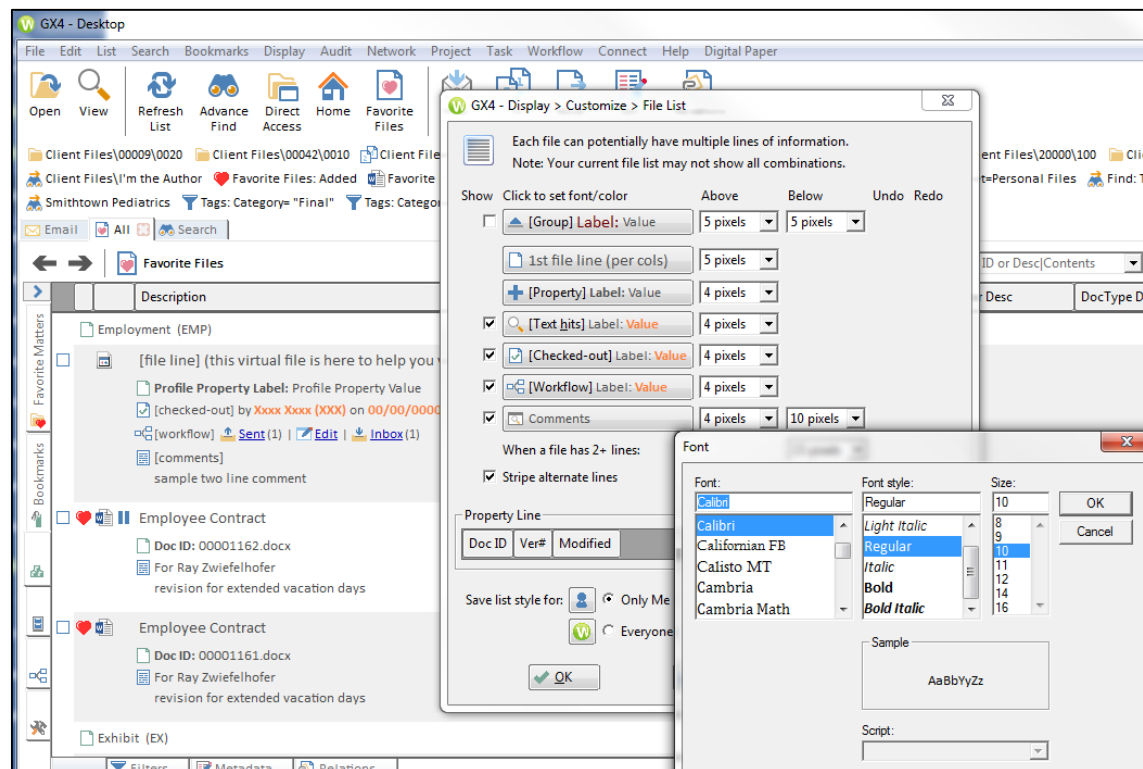
Customize Margins in the File List

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.
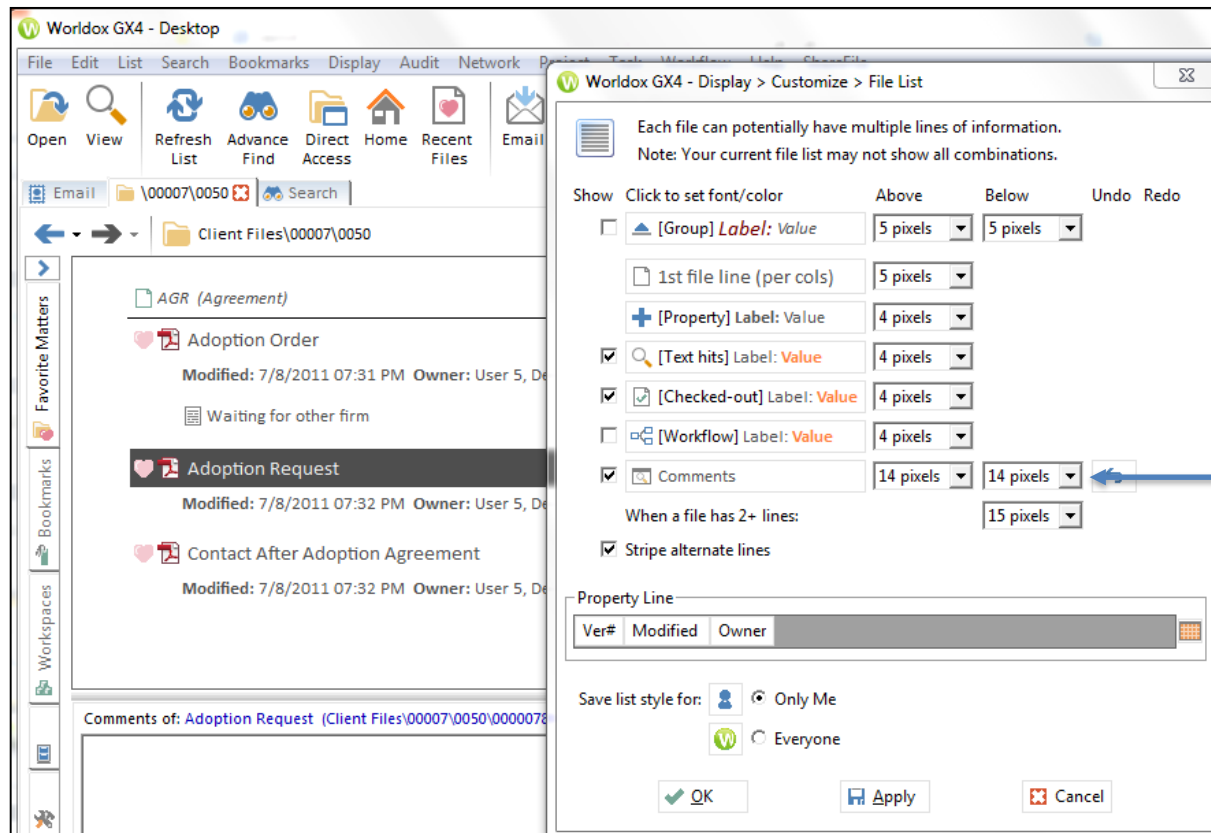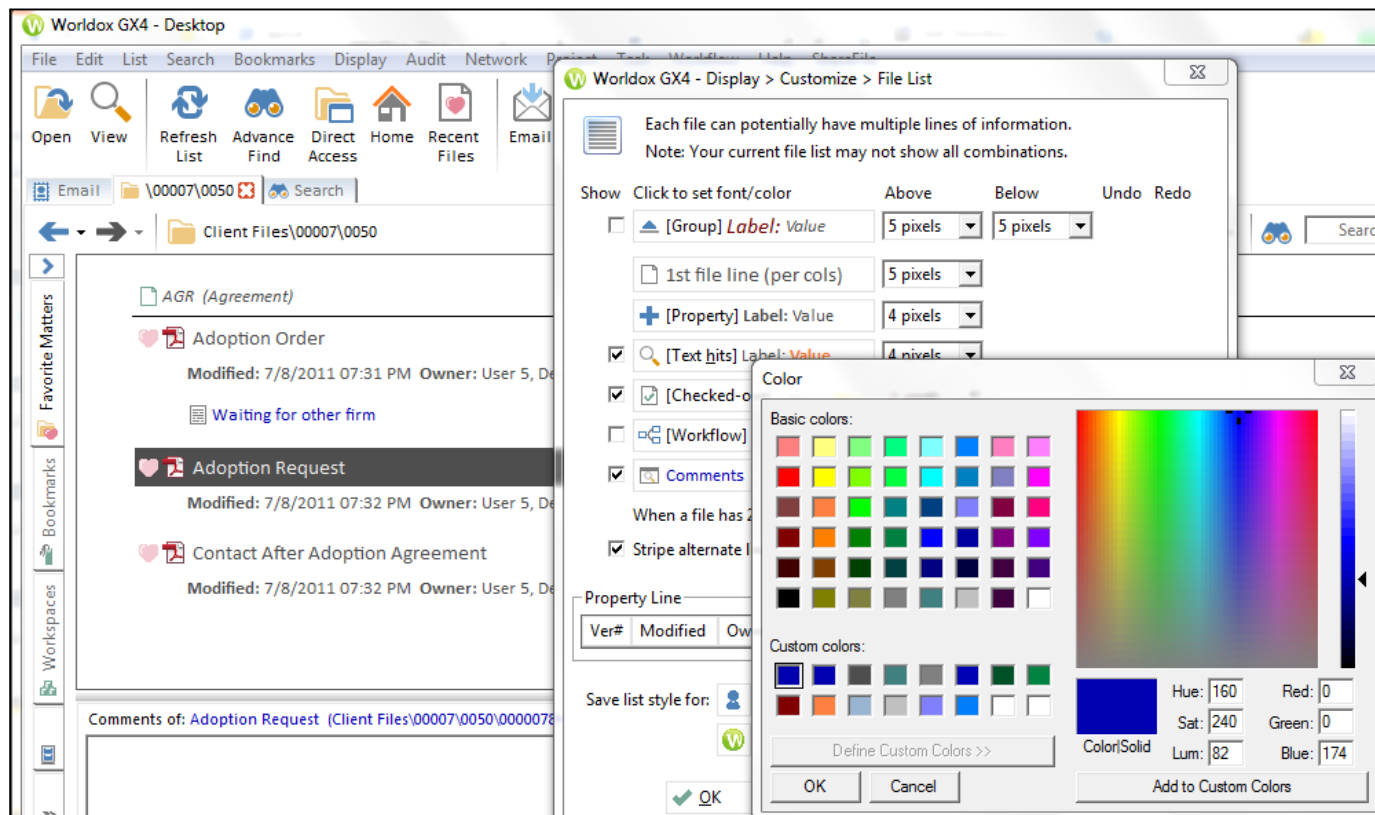3. In the Comments field, left-click and select **Change Color**. Use the Color dialog to make changes.

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.
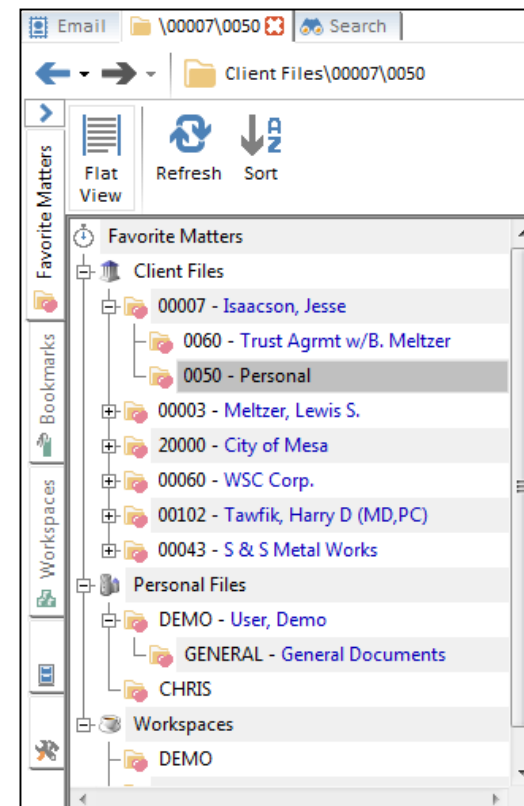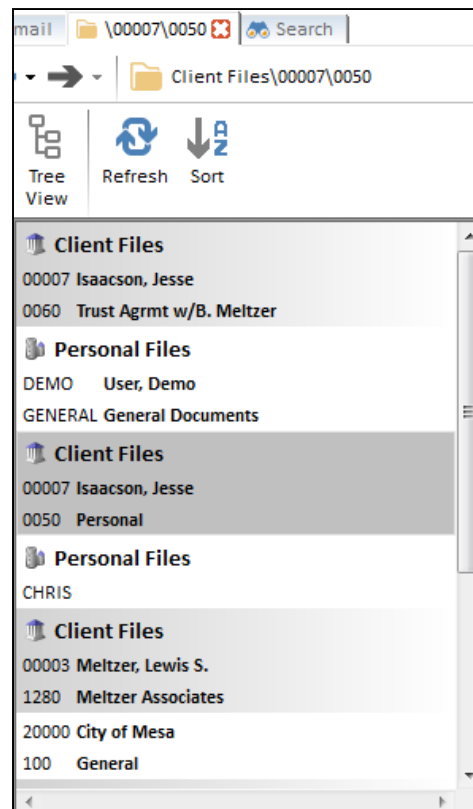
Full List Tab Has Been Replaced with the Arrow Icon

In previous versions of Worldox, the first tab in the bottom tab bar was named "Full List":
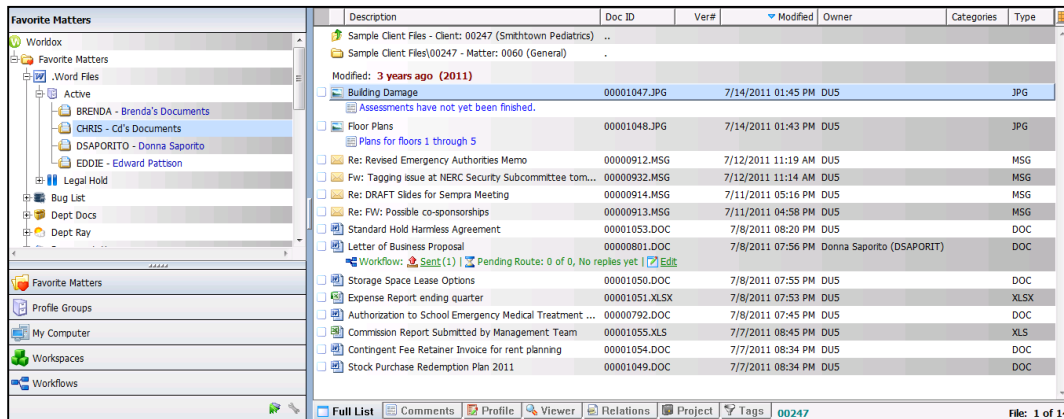
In Worldox GX4, you can simply click an arrow button next to the bottom tabs to view the full file list.

Cabinets Folder Tree Has Replaced Profile Groups

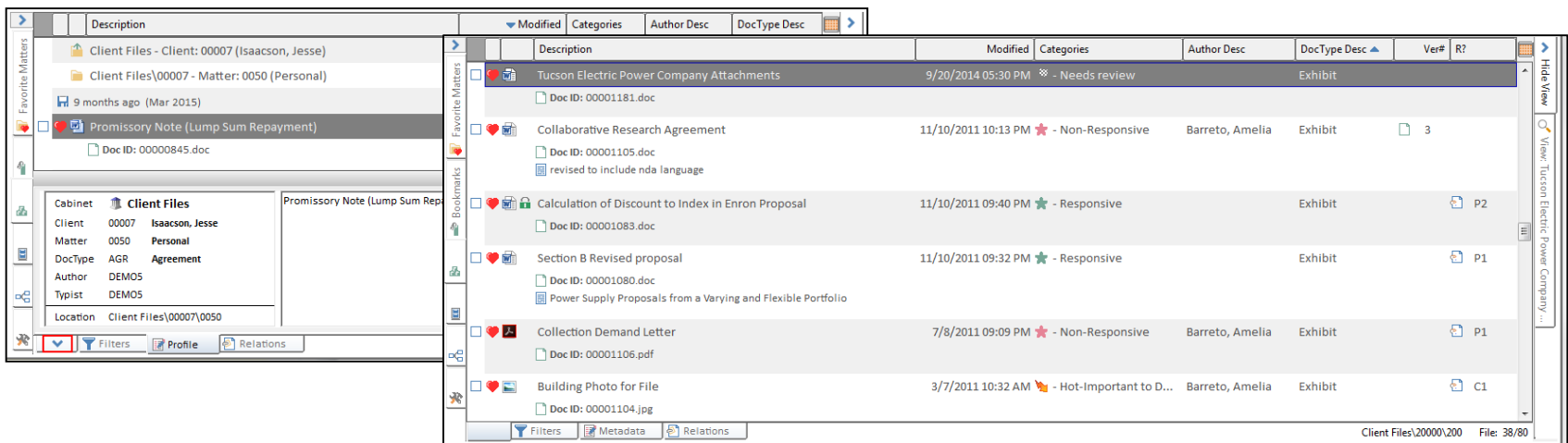In previous versions of Worldox, a Profile Group was a category of profiles (a form used to profile documents). Worldox GX4 now refers to that as a Cabinet. Worldox allows up to 150 different cabinets. For example, you may have one cabinet for administrative documents and another cabinet of documents 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.
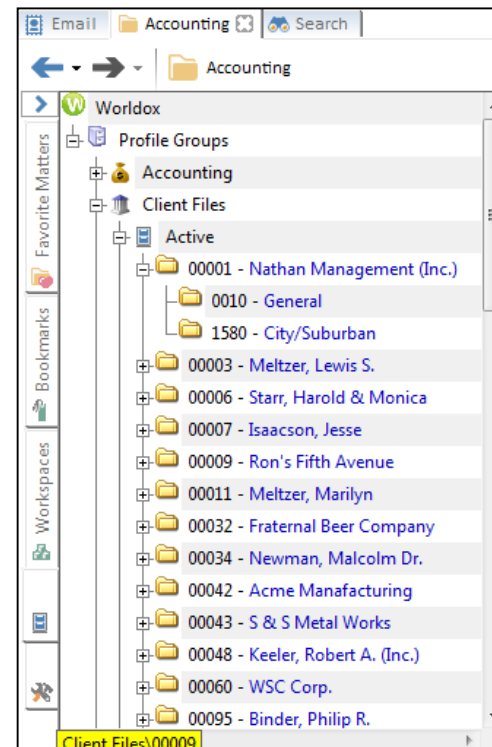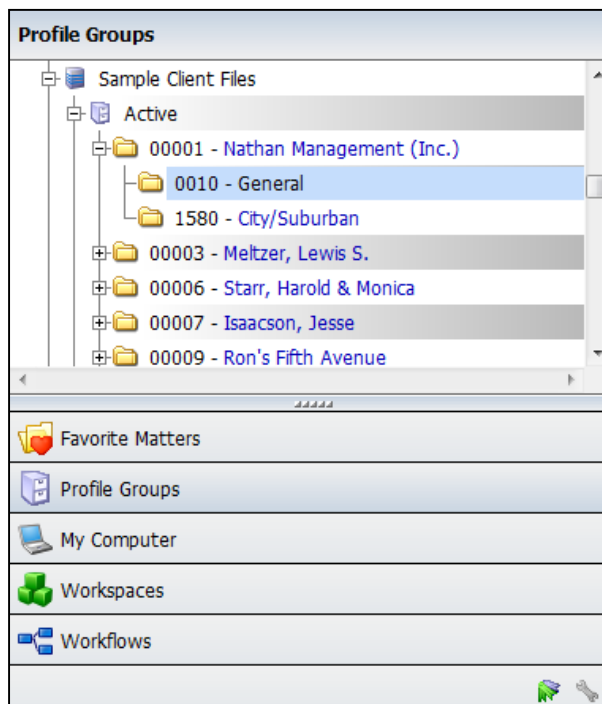
Tool Tips for New Methods

Descriptive tool tips pop up when you hover over new options to guide you as you use Worldox GX4.
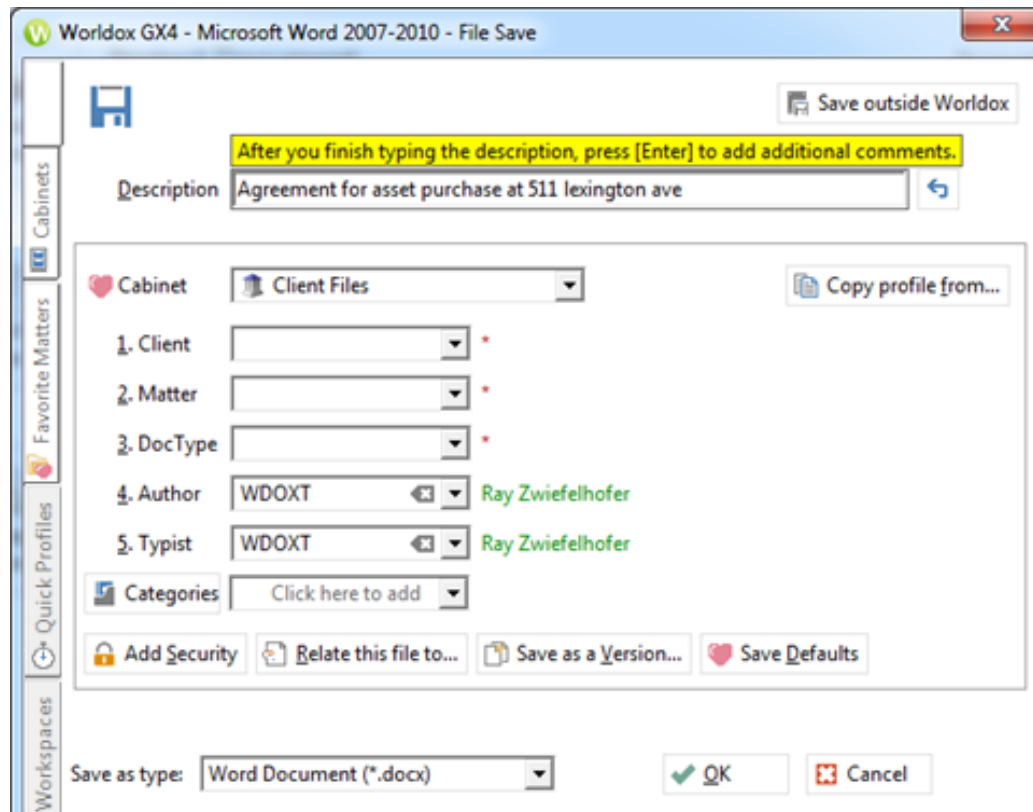
Print Security Groups and Walls Information from WDADMIN

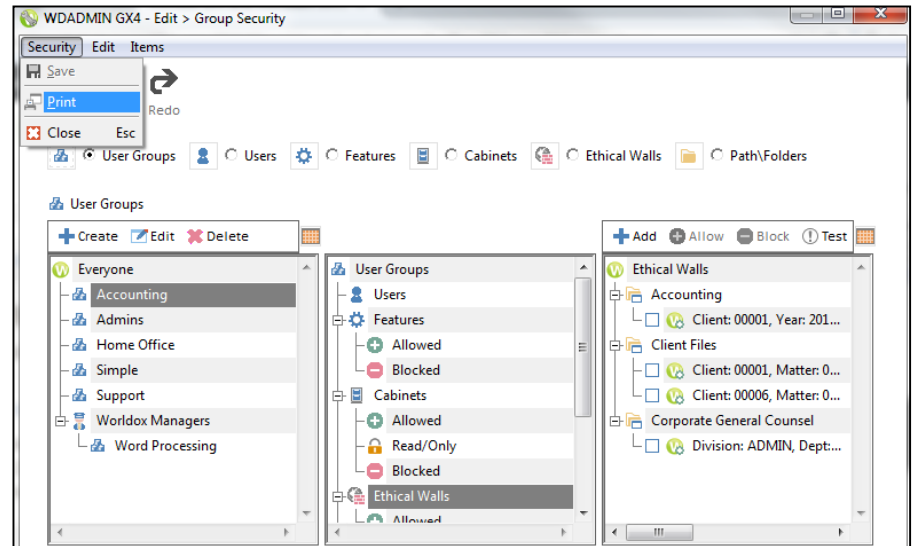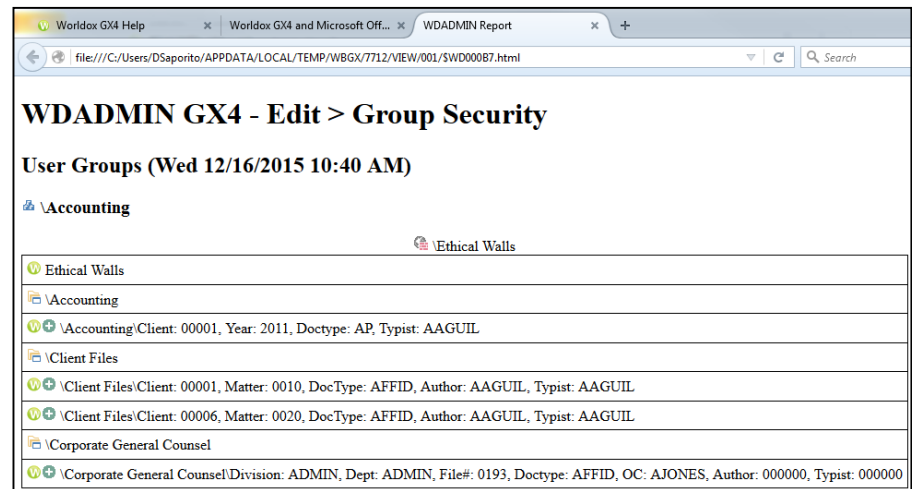You can now print reports with details about Worldox Security Groups and Ethical Walls.

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.

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:

1. In WDADMIN, select **Edit** > **Group Security**.
2. Click the **Ethical Walls** radio button.
3. Select an Ethical wall.
4. Select **Sync Selected Rule(s)**.
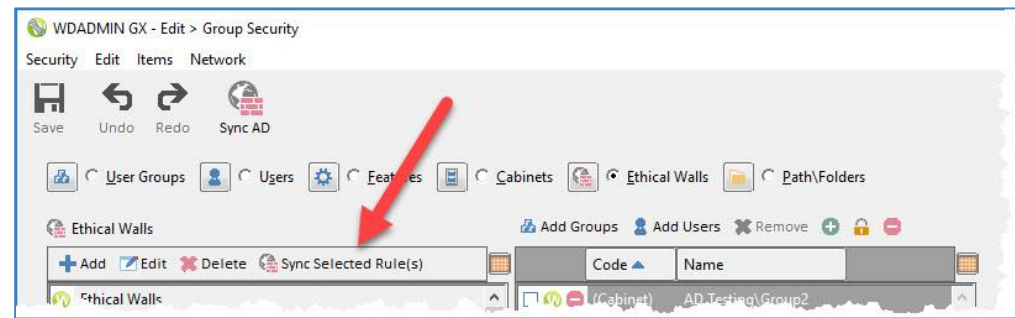
Full Support for Microsoft Office 2016

Worldox features are fully integrated with Microsoft Office 2016.

You can use the following Microsoft Office 2016 applications within Worldox:

- Microsoft Word 2016
- Microsoft Excel 2016
- Microsoft PowerPoint 2016
- Microsoft Outlook 2016

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
- | = OR broadens searches

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

https://knowledgebase.worldox.com/

Worldox GX4

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