Worldox Web 2.0

USER GUIDE

V 1.0

2015

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WORLDOX WEB 2.0 USER GUIDE

INTRODUCTION

Worldox Web 2.0 is an Internet application server that works in conjunction with the Worldox GX4 document management system. It makes corporate documents available to authorized users over the World Wide Web. This guide explains the features and functions of Worldox Web 2.0.

WORLDOX WEB 2.0 OVERVIEW

Worldox Web 2.0 is a unified, easy-to-deploy document management solution that works with handheld mobile devices such as iPad and iPhone®, as well as a variety of Smartphones, and Tablets, and with standard web browsers on notebooks and desktop PCs. It works differently depending on the device being used, but in each case delivers powerful mission-critical features and access to your data.

On handheld devices: Worldox Web 2.0 will allow users to Find, View and Email documents and emails stored in Worldox directly from their PC or other handheld devices. It gives mobile device users automatic, real-time accessibility to Favorite Matters, Favorite Files, Bookmarks, Workspaces and Find Templates which are copied directly from the user's Worldox desktop.

Note: Worldox Web 2.0 provides the same functions on handheld devices that it does on the PC browser. However, due to smaller screen resolutions on handheld devices, there are some differences in the way certain menu options or file commands are initially displayed. For details, see *Worldox Web 2.0 on a Handheld Device/Smartphone.*

On a PC Browser: When accessed from within a Web browser running on a PC notebook or desktop, Worldox Web 2.0 offers a simple and modern interface. Robust commands, such as Find, View, Check Out, Check In, Version Control, and Email are all available. As with handheld access, users have automatic, real-time accessibility to Favorite Matters, Favorite Files, Bookmarks, and Find Templates directly from their Worldox desktops.

Worldox Web 2.0 is the Internet companion product to Worldox GX4. It offers easy, secure access to your documents over the Internet (support for SSL). Worldox Web allows today's busy professionals to access their work product remotely while maintaining the highest level of productivity independent of location. This can be done via a remote PC browser or one of the many mobile handheld devices supported by Worldox Web 2.0.

In simple terms, remote access to your Worldox documents – Anytime, Anyplace

Worldox Web 2.0 Master Features List

Here is a list of all the features of Worldox Web 2.0. Please note that every feature might not be available depending upon your site's configuration or the device being used.

Features	Description
Full Profile Search	Search the DMS by Profile Fields, Doc ID, Description, Comments, Full Text and Date Range information, just as you are accustomed to doing in the office using Worldox.
Quick Search	Allows users to perform a quick search on a Worldox cabinet. Users can search on Full Text, Doc ID, or Description.
Find Templates	Find Templates are customized to search specific Cabinets of the DMS.
Email Files	Email files to co-workers or customers whenever necessary.
Cabinets	Drill down on a folder tree consisting of Worldox Cabinets.
Favorite Matters, Favorite Files, Workspaces, and Bookmark access	See the same Favorite Matters, Favorite Files, Workspaces, Find Templates, and Bookmarks as they do within the Worldox DMS client.
Check Out	Check out a document and download a copy for editing off-site. A copy of the document is left in the DMS and marked as Read-only while the user has the document checked out of the system for revisions.
Check In	Check in documents that have been previously checked-out of the DMS for editing. Versioning is also now supported.
Download	Download a file from Worldox to your local PC. Users may also download a copy of a file without having to check the file out if they only require it for viewing purposes.
Upload a New File	Upload and Profile new documents into Worldox. Create documents off site and then upload them into Worldox at your convenience.
View	View and print documents stored in the Worldox DMS via the web browser. All other files are converted from their native format to HTML for viewing purposes via the browser. Emails stored in Worldox are also now viewable.
View Profile	View the profile information of a document or file stored in the DMS.

Features	Description
User Accounts	Set up individual user accounts requiring a user ID and password to access Worldox Web. Each user's Worldox Web account can be tailored for their specific needs. Administrators can determine which Worldox Web features each user can access.
Security Groups	Groups can be created via WDAdmin to allow or restrict features and rights while accessing Worldox Web.
Audit Trail	Utilizes the same audit trail as Worldox to log access events.
SSL Support	Worldox Web can be configured to support an SSL Certificate.
End User Features	Any of the Worldox Web end user features can be blocked or allowed by users or groups. This allows you to tailor the site based on each user's login account.
Versioning	This is now supported in Worldox Web 2.0.
Multiple Proxy Support	For businesses with multiple locations Worldox Web supports multiple proxies for faster access to each location's documents.

DOCUMENTATION RESOURCES

You can access the latest versions of Worldox installation, administration and user guides by clicking the **Documentation** link on the Worldox Knowledge Base. https://knowledgebase.worldox.com/

You can register for an account from the main page and World Software will email you a password to gain access.

WORLDOX WEB 2.0 ON A BROWSER

REQUIREMENTS

Worldox Web 2.0 is compatible with Microsoft Internet Explorer, Mozilla Firefox and Google Chrome web browsers. For Microsoft Internet Explorer, you must use version 10 or higher.

Note: Please disable the Compatibility View from the Tools menu when you use Microsoft Internet Explorer.

LOGGING IN TO WORLDOX WEB 2.0

1. To log in to Worldox Web 2.0, type the URL of your Worldox website in your browser's address bar, for example, https://wdweb.worldox.com.

    The Login screen appears.

2. Enter the following Information:

    Document Server:

    Server Password:

    User Code:

3. Click **Continue.** Progress messages inform you that your credentials are being authenticated and that you are being connected.

You also see the following options:

- **That's not me.** Click this to return to the original login screen.

- **I forgot my password.** Click this to begin the password reset process. For details, see *Changing Your Password for Worldox Web 2.0.*

4. Enter the **User Password.**

5. Click **Continue.** The Worldox Web 2.0 file list appears.
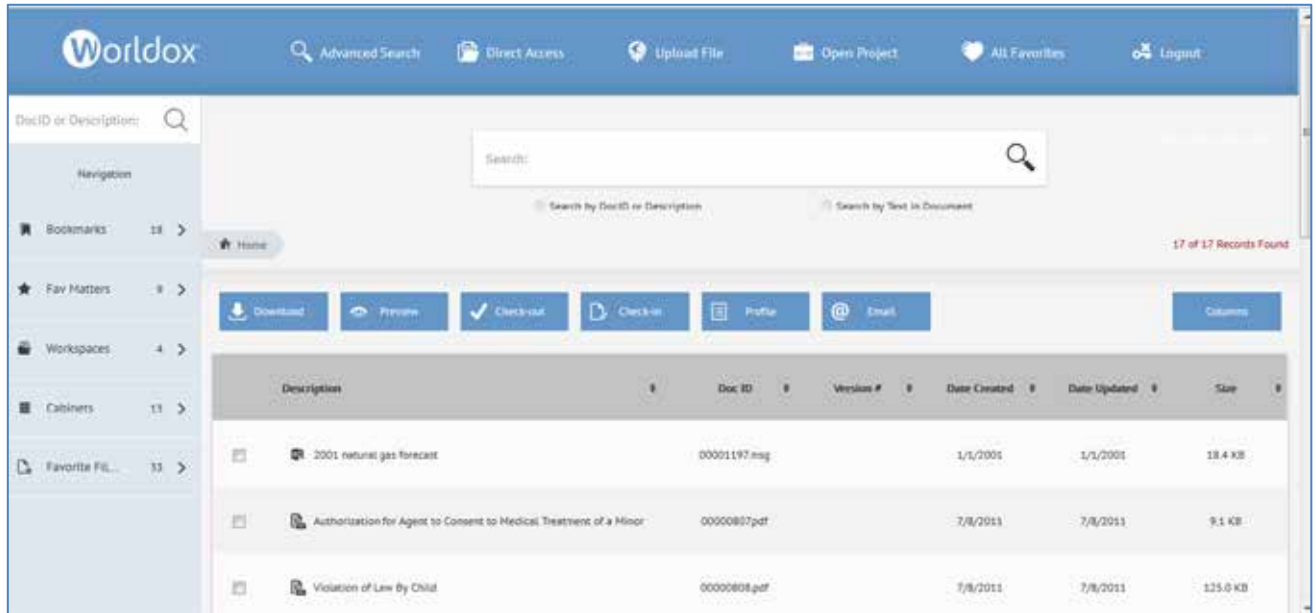
Note: If you enter any information incorrectly, a red "x" icon appears next to the field with invalid credentials.

By default, the maximum number of log in tries is five (5) attempts. This is configurable in through the web server. After the max attempts have been reached, the same invalid error will continue to be displayed even if the correct information is entered until you reload the web page.

To log out of Worldox Web, simply click the **Logout** option.

Note: You will be logged out of Worldox Web automatically if you are idle for fifteen minutes or more.

UNDERSTANDING PROFILE ELEMENTS

A file's location (folder path) is determined by the **Cabinet** (known as **profile group** in previous versions of Worldox) and profile field values used to identify that document.

Profile forms start with the cabinet choice (or pre-selection, if there is only one group available). Fields on profile forms – such as *Client*, *Matter*, *DocType* and *Typist* – reflect the fields used for the selected cabinet.

Use the **Description** field to describe the contents of the file. The description can be up to 128 characters long. After you finish typing your file description, you can press the Enter key to add a line or lines for additional comments. You can view comments in the file list. Comments can hold up to 5,000 characters and are fully text searchable.

Use the **Security** feature in Worldox to protect the file. Examples of the types of security that can be applied are: *Hidden* and *Protected*.

WORLDOX WEB 2.0 TOOLBAR OPTIONS

The following table describes toolbar options in the browser version of Worldox Web 2.0 and their functions.
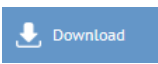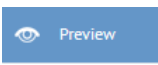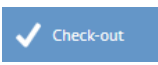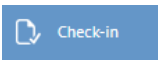
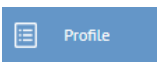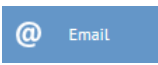| Menu	Description
Advanced Search	**Advanced Search** opens the Search Templates dialog, where you can open a search form to use in searching. For details, see *Using Advanced Search to Find Files.*
Direct Access	**Direct Access** is used to take a direct path to folder contents. This opens the Direct Access form, where you enter profile field identifiers (which equate to folder locations) to see files in that location. Using *Direct Access* is similar to entering *Doc ID* or *Description* information on the *Location* toolbar. For details, see *Using Direct Access.*
Upload File	**Upload** uploads the selected file to Worldox Web 2.0 so you can add profile information. For details, see *Uploading a File.*
Open Project	**Open Project** enables you to browse to a Worldox file link (.wdl file) that you have saved locally to your PC, iPad or iPhone. You can then open it in Worldox Web to view the file(s). For details, see Opening a Project*Opening a Project (WDL File)* and *Opening Projects (WDL Files) on iPads and iPhones.*
Favorite Files	**All Favorites** displays a list of the recently used files by file types (programs) and by file action. The list reflects your activity, so, the list of Favorite Files changes over time. For details, see *Error! Reference source not found.*.
Logout	**Log Out** logs you out of Worldox Web.

WORLDOX WEB 2.0 FILE COMMAND OPTIONS

The following table describes file command options in the browser version of Worldox Web 2.0 and their functions.

⬇ Download	👁 Preview	✓ Check-out	🗋 Check-in	▤ Profile	@ Email

Button	Command/Description
⬇ Download **Download**	**Download** to download the selected file. For details, see *Downloading a File*.
👁 Preview **Preview**	**Preview** displays the selected file in the Worldox Viewer window. Using the Viewer toolbar, you can open the file or advance to the next or previous file on the list. For details, see *Previewing Files*.
✓ Check-out **Check-out**	**Check Out** checks out a file. When you check out a file in Worldox Web, it is downloaded to your local machine or handheld device's memory. A check mark icon will be displayed next to the file in the list. For details, see *Checking In and Checking Out Files*. **Note:** If you are unable to check out a file, it is most likely because another user has already checked out that document or because the document has had Worldox file security applied. You cannot check out a secured, Read-only document unless you are the owner of that file. Files that have been checked out by you have a green check mark icon next to them. Files that have been checked out by another user have a red check mark icon next to them.
🗋 Check-in **Check-in**	**Check In** synchronizes documents that you have checked out with their network (original file) counterparts. § You can choose to overwrite the original file with the local checked-out copy. § Or, you can choose to make the original file the previous version, saving the checked-out copy as the current, primary file. § Or, simply discard the checked-out copy, restoring full access to the unchanged original. For details, see *Checking In and Checking Out Files*.
▤ Profile **Profile**	**Profile** displays the Profile window, where you can view a document's profile information, such as the Cabinet, location, date created, etc. For details, see *Viewing Profile Information*.
@ Email **Email**	**Email** is used to email file(s), or internal Worldox links to files (WDL), directly from Worldox. For details, see *Emailing a File*.

Button	Command/Description
✖ Delete **Delete**	**Delete** allows you to delete a file. **Note:** You can only see this option on the Worldox Web's command menu if you have permission enabled for this feature in WDADMIN.exe.

WORLDOX WEB 2.0 RIGHT-CLICK MENU OPTIONS

In addition to using command option buttons as described in the previous section, you can also right-click file names to select command options.
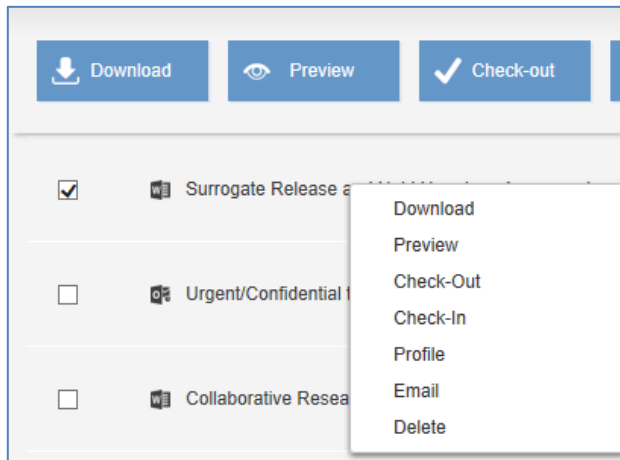

The following table describes right-click file command options in the browser version of Worldox Web 2.0 and their function.

Button	Command/Description
Download	**Download** to download the selected file. For details, see *Downloading a File*.
Preview	**Preview** displays the selected file in the Worldox Viewer window. Using the Viewer toolbar, you can open the file or advance to the next or previous file on the list. For details, see *Previewing Files*.
Check-out	**Check Out** checks out a file. When you check out a file in Worldox Web, it is downloaded to your local machine or handheld device's memory. A check mark icon will be displayed next to the file in the list. For details, see *Checking In and Checking Out Files*. **Note:** If you are unable to check out a file, it is most likely because another user has already checked out that document or because the document has had Worldox file security applied. You cannot check out a secured, Read-only document unless you are the owner of that file. Files that have been checked out by you have a green check mark icon next to them. Files that have been checked out by another user have a red check mark icon next to them.

Button	Command/Description
Check-in	**Check In** synchronizes documents that you have checked out with their network (original file) counterparts. § You can choose to overwrite the original file with the local checked-out copy. § Or, you can choose to make the original file the previous version, saving the checked-out copy as the current, primary file. § Or, simply discard the checked-out copy, restoring full access to the unchanged original. For details, see *Checking In and Checking Out Files*.
Profile	**Profile** displays the Profile window, where you can view a document's profile information, such as the Cabinet, location, date created, etc. For details, see *Viewing Profile Information*.
Email	**Email** is used to email file(s), or internal Worldox links to files (WDL), directly from Worldox. For details, see *Emailing a File*.
Delete	**Delete** allows you to delete a file. **Note:** You can only see this option on the Worldox Web's command menu if you have permission enabled for this feature in WDADMIN.exe.
Add to Added Favorite Files	**Add to Added Favorite Files** adds a file to the Favorites list. This option is available on the right-click menu in list views. The list on the home screen does not have this option because it shows Favorites by default.

WORLDOX WEB 2.0 NAVIGATION PANEL

The Worldox Web 2.0 Navigation Panel enables you to access Bookmarks, Fav Matters, Workspaces, Cabinets, and Favorite Files.
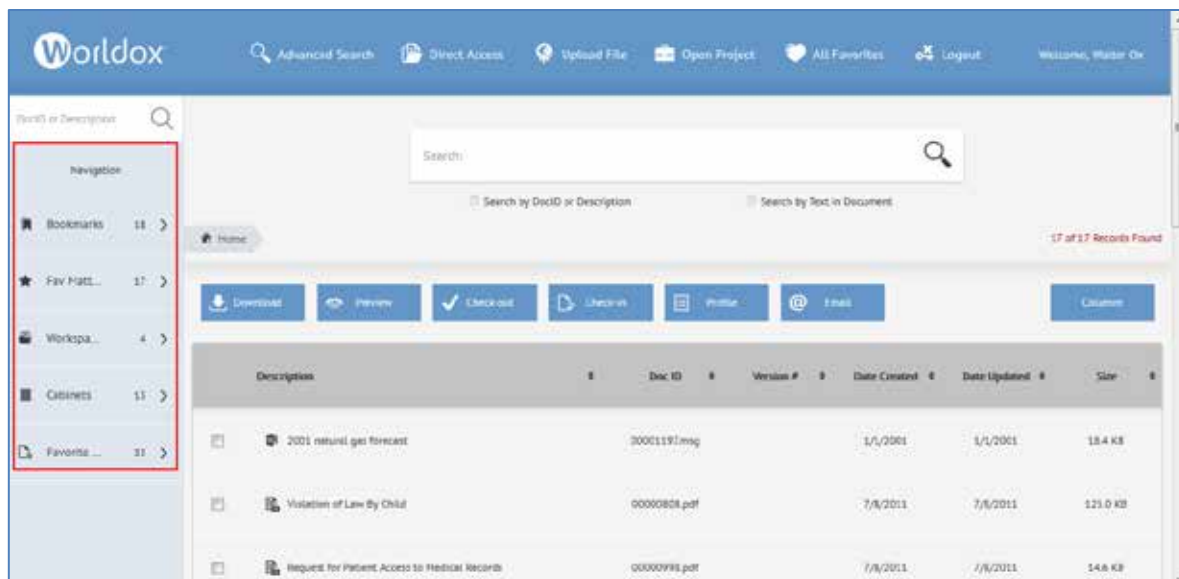
In the following example, the **Cabinets** category has been selected in the Navigation Panel. You can click a Cabinet (e.g. Accounting, Client Files, etc.) to view the relevant file list.
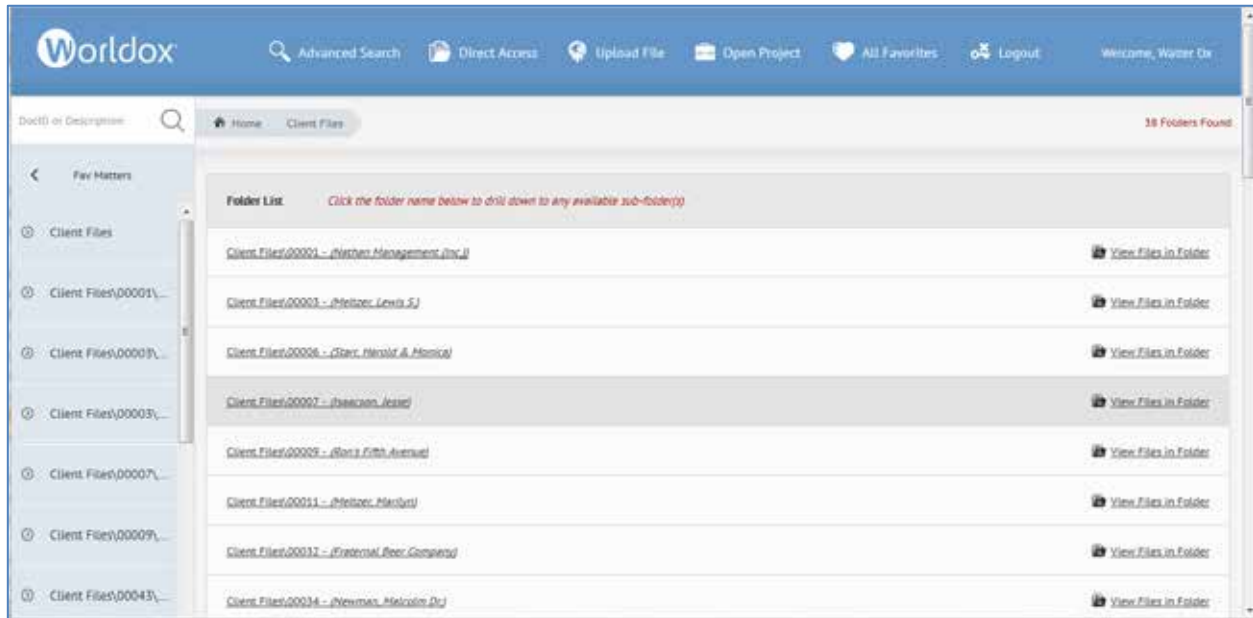
WORLDOX WEB 2.0 COLUMN LAYOUT

This section describes how to add or remove columns in the Worldox Web 2.0 file lists. Click the **Columns** button on the right side of the screen, above the file list.
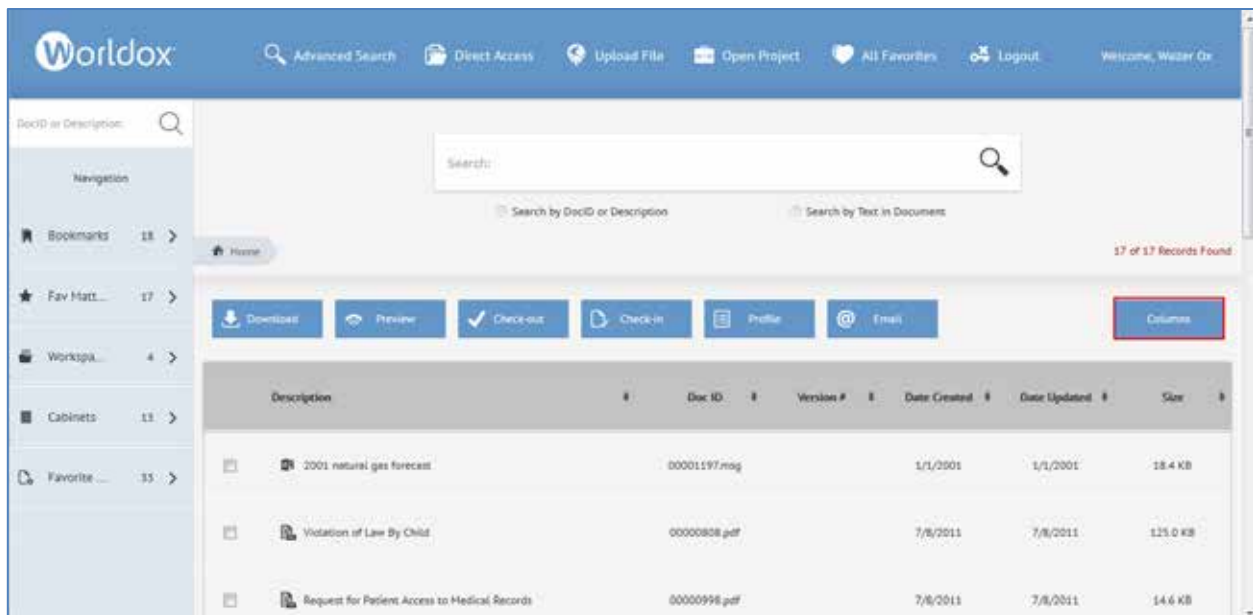
You can select from the following options:

- § **Description**
- § **Doc ID**
- § **Version**
- § **Date Created**
- § **Date Updated**
- § **Comments**
- § **Size**

You can click the **Columns** button again to hide the options.

Changing Sort Order in File Lists

1. While you are viewing a file list, click the double arrows in the column on which you want to sort.
2. For example, if you want to sort on the Description column, click the double arrows.
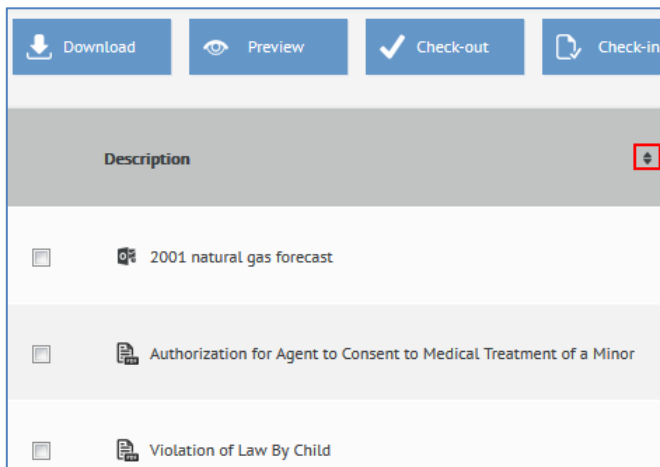
3. A down arrow appears and the descriptions of file names appear in descending order.
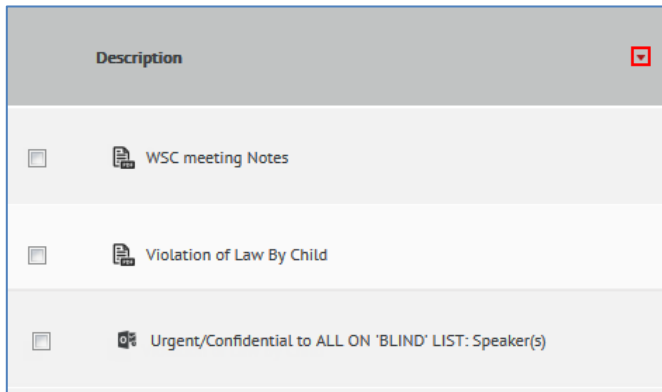
4. To change the sort column or direction to ascending, click the down arrow. An up arrow appears, and the files are displayed in ascending order.

ADDING COMMENTS TO FILES

1. To add Comments to a file, check the box next to the file name in the list.
2. Click the **Profile** button.
3. Scroll to the bottom of the Profile panel.
4. Type your comments and then click **Submit**.
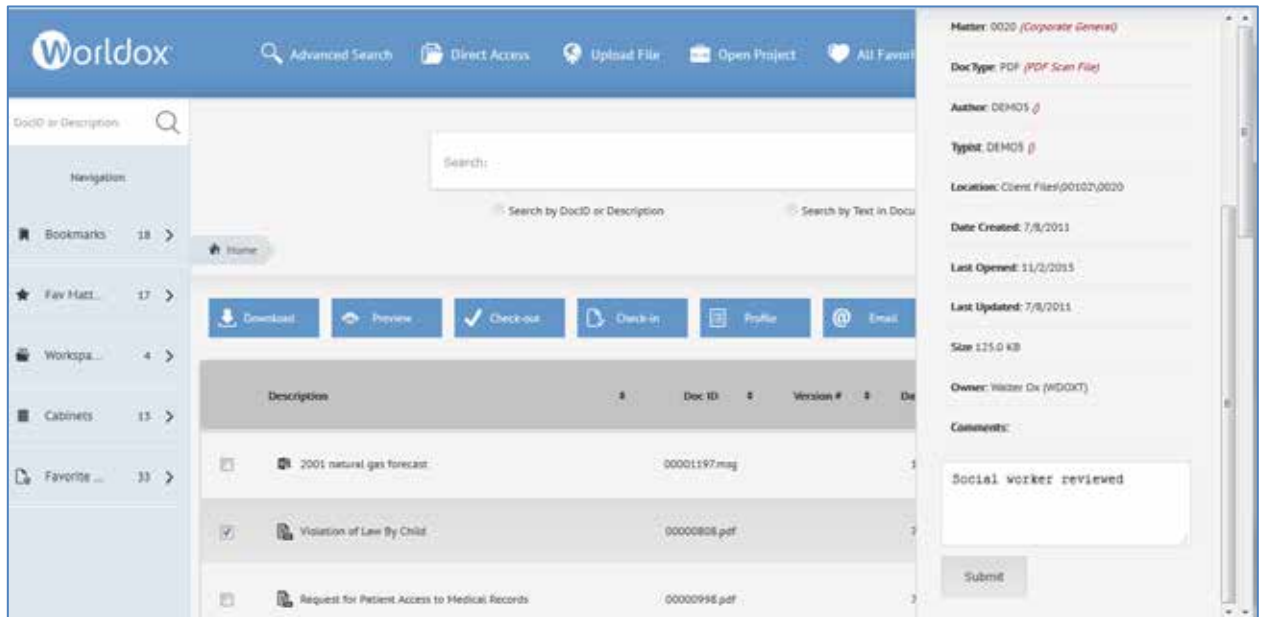
5. Click the **Columns** button and then check **Comments**.
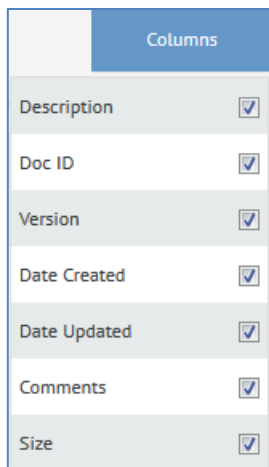
6. Click the **Columns** button again. The comments that you just added to the file are displayed in the Comments column.
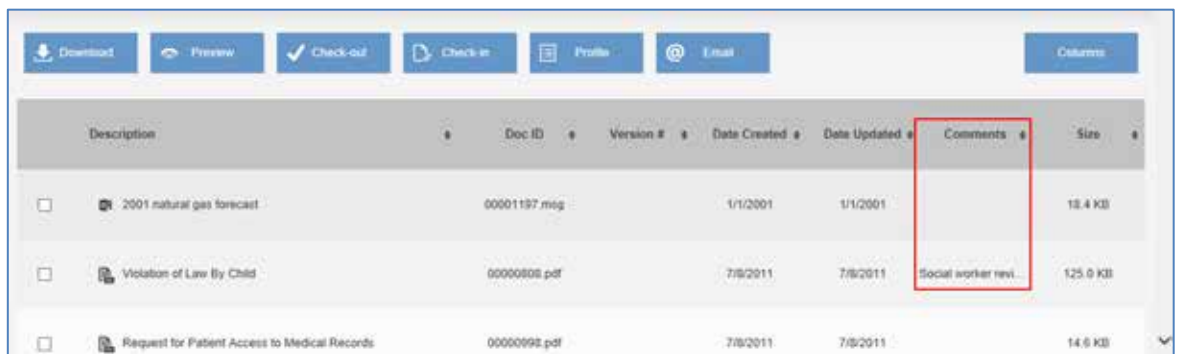
LOADING MORE FILES IN THE LIST

When you are viewing a file list, you can select **Load More** to view the full list. By default, only the first twenty available files are displayed. Your administrator can change the default number of files if necessary.
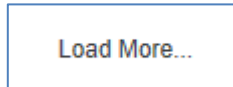
SEARCH FOR A DOC ID OR DESCRIPTION

The Worldox Web file list provides a search bar where you can enter either a Document ID or Description to conduct a search. Enter search criteria in the **Doc ID or Description** bar.
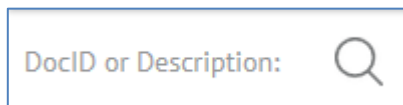
In the following example, the word (file description) "income" has been entered into the search bar.
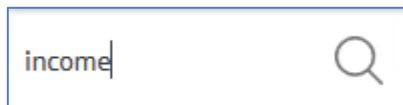
The following example shows search results for file descriptions that contain the word '"income".

If no files that match your search criteria are found, a message pops up to state that.

Search by Text in Document

When you are in the Worldox Web Home screen, you also have the option to search for text within documents. Click the **Search by Text in Document** radio button. Enter some text and then click the

magnifying glass search [icon] icon.
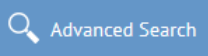
Any files that contain that text will be displayed in the search results. You can click the file in the list and

then click the **Preview** [Preview] button to confirm that the text is in the file's content.

USING ADVANCED SEARCH TO FIND FILES

Worldox Web's Advanced Search [Advanced Search] option uses search templates so you can specify text and/or profile values for your search. Any found files then display in a list of results.

1. Click **Advanced Search** button to search for a file. The Search Templates dialog appears.
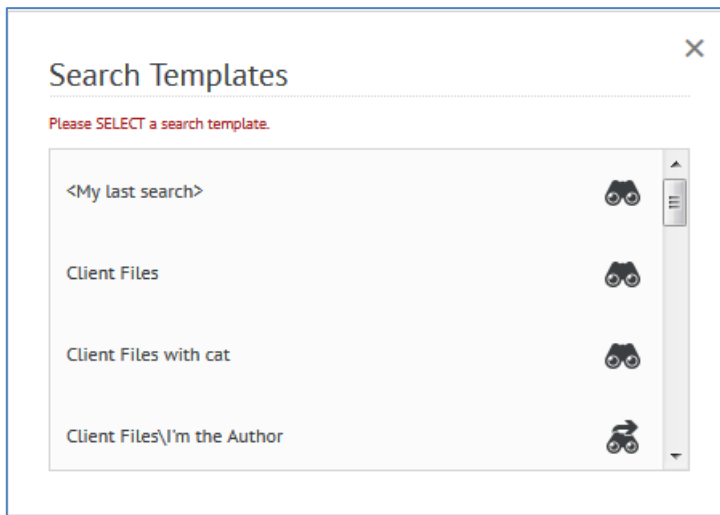
Note: An icon with binoculars and an arrow means that the search runs immediately upon selection. Clicking one of these listings starts the search without first opening the form.

2. Click a search template. The search form opens.

3. Enter search criteria and/or select field codes from any tables (for example, Client, Matter, etc.). The available search fields and order of fields will be based on the selected search template. In the following example, the word "income" is added to the Name/Comment field as a search parameter.

4. Scroll down the form and select **Submit**. The file list displays a list of any files that match the search criteria.

Note: If there are no results that match your search query, a pop-up message will inform you that no matching files were found. You can start a new search, modify your search criteria, or cancel the search.

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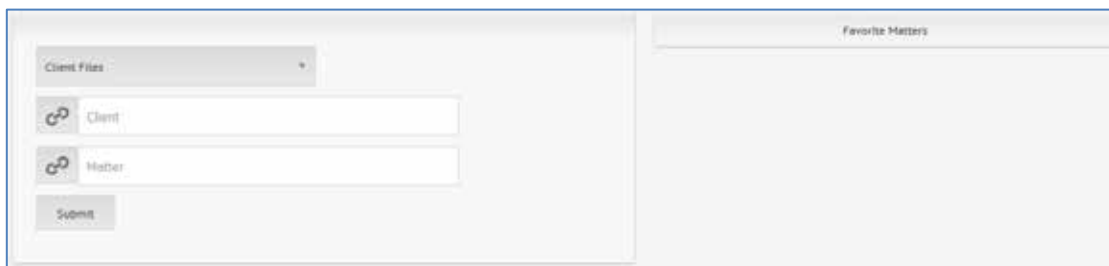
USING DIRECT ACCESS

Direct Access provides shortcuts to documents based on location by identifying profile field values corresponding to the file folders in which documents are stored. Direct Access is convenient and fast. It enables you to quickly reach document folders without searching.
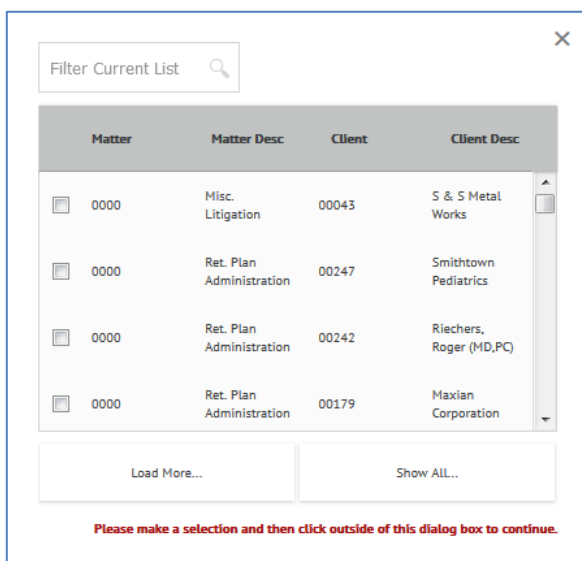
In a client\matter filing system, for example, documents would be stored based on specific Client and Matter values identified in document profiles. Using Direct Access, you enter or select Client and Matter codes to open the folders containing documents profiled with those codes.

Direct Access uses direct folder navigation, which is more efficient than searching. This means that you can reach files with Direct Access regardless of the status of the central index (the program that tracks Worldox-managed files and folders).

1. From the Worldox main window, click the **Direct Access** [Direct Access] button. The Direct Access form appears.

2. If you want to change the cabinet, click the **Cabinets** button. If you select a different group, the form reloads, and field choices change according to the fields associated with that cabinet.

3. Click profile field buttons to display field lookup tables so you can select codes or values.

> **Note:** Field tables that have many listings provide **Load More** or **Show All** options if you need to view more listings than the ones that are initially displayed.

> **Note:** You can also click the **Favorite Matters** button on the Direct Access form to quickly access files in a certain folder.
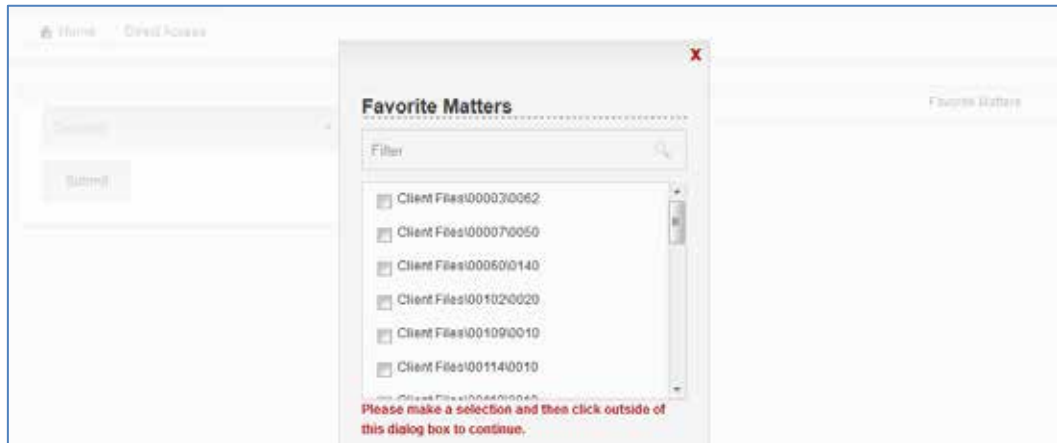
4. After you select appropriate field codes for each sub-folder field for the cabinet, click **Submit**. The folder you just identified opens, displaying file contents in a new file list.

Note: If you type a code that is not valid and click **Submit**, the field in the Direct Access form will turn red and inform you that the code is invalid.
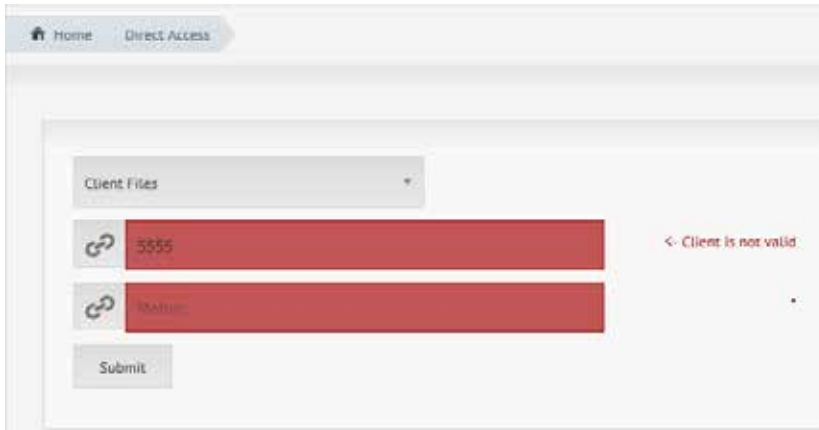
Fields will also turn red and display an asterisk if you try to submit a Direct Access form before filling in mandatory fields.

UPLOADING A FILE

This section describes how to upload a new file into Worldox Web 2.0.

To upload a new file, do the following:

1. Click the **Upload File** option. The Upload File form appears.

2. Do one of the following:

   § Click Browse to find a file to upload.

   Or

   § Drag a file from Worldox or Windows Explorer and drop it on to the **Drop File Here** field box.

3. Select or fill in the following profile information. (Or you can select **Quick Profiles** or **Favorite Matters** to automatically populate profile information.)

    §   **Cabinet**

    §   **Profile Fields** (for example, Client, Matter, Doc Type, Author, etc.)

    §   **Description**

    §   **Security**. Choose one of the following options:

        §   **None**

        §   **Checked Out**

        §   **Hidden**

        §   **Protected**

    > **Note:** Instead of manually filling out form fields, you can click the **Quick Profile** button or **Favorite Matters** button to quickly populate the fields with pre-defined profile data.
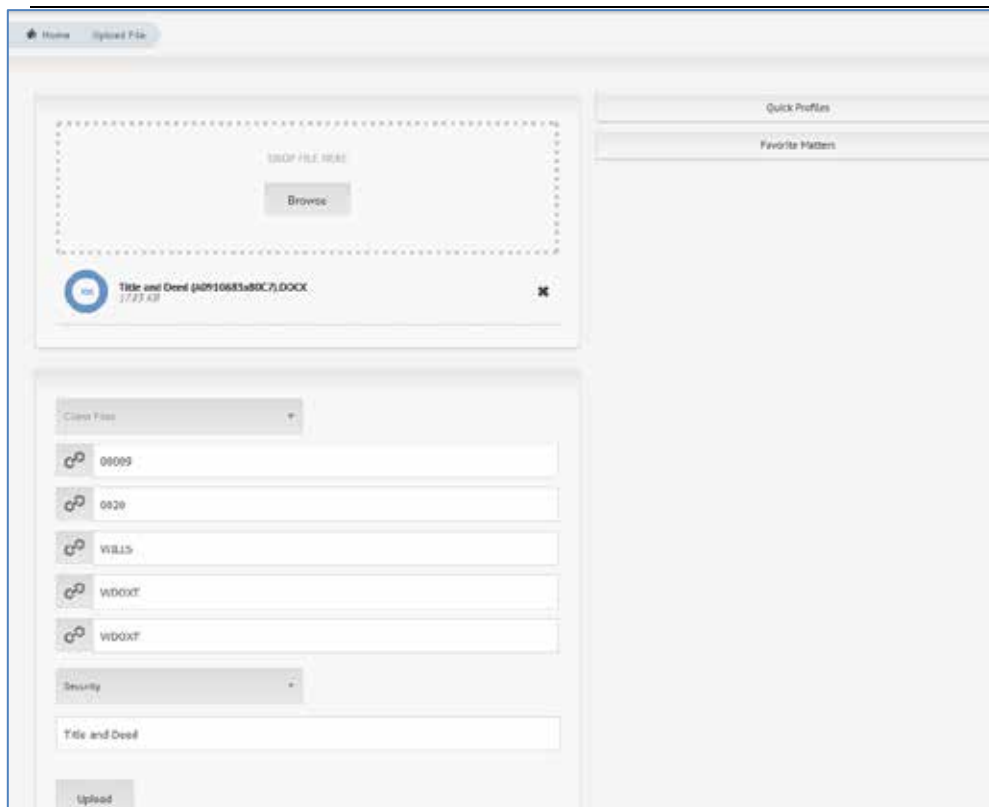
4. Select **Upload.**

5. A message confirms that the file has been uploaded successfully.
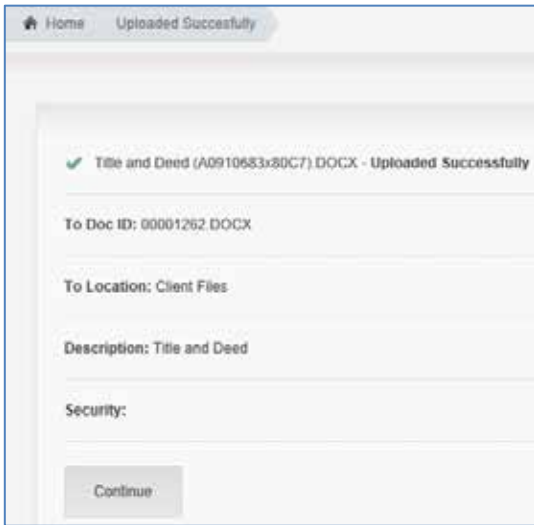
6. Click **Continue**. The file list displays the file you just uploaded to Worldox Web.
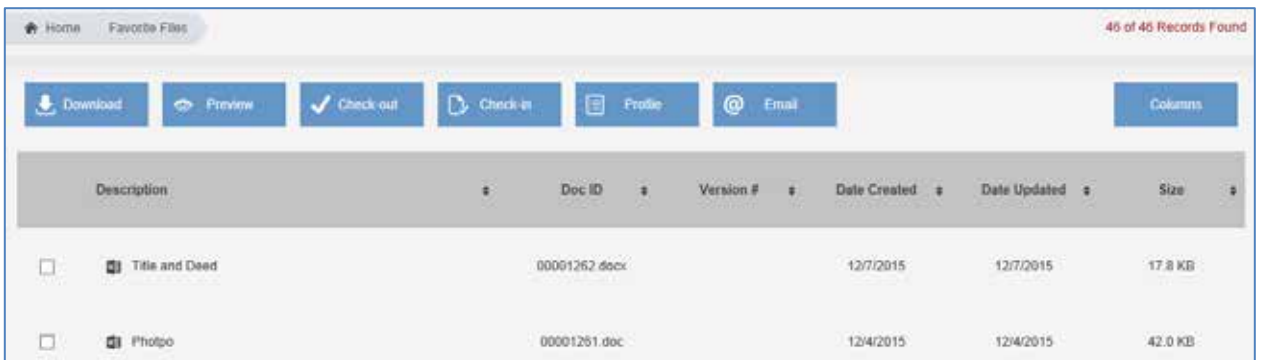
OPENING A PROJECT (WDL FILE)

The Open Project feature in Worldox Web enables you to browse to an internal Worldox file link (.wdl file) that you have saved locally on your PC or device.

Note: If you are using Worldox Web on an iPad or an iPhone, you can open the .wdl in the Worldox for iPad or iPhone app. The Open Project feature is not yet supported on Android devices because a Worldox for Android app must be developed in order to open .wdl files on Androids. For details about using Open Project on iPads and iPhones, see *Opening Projects (WDL Files) on iPads and iPhones*.

1. Click the **Open Project** [Open Project] option. The Open Local Project form appears.

2. Browse to a Worldox file link (.wdl file) that is saved locally on your PC.
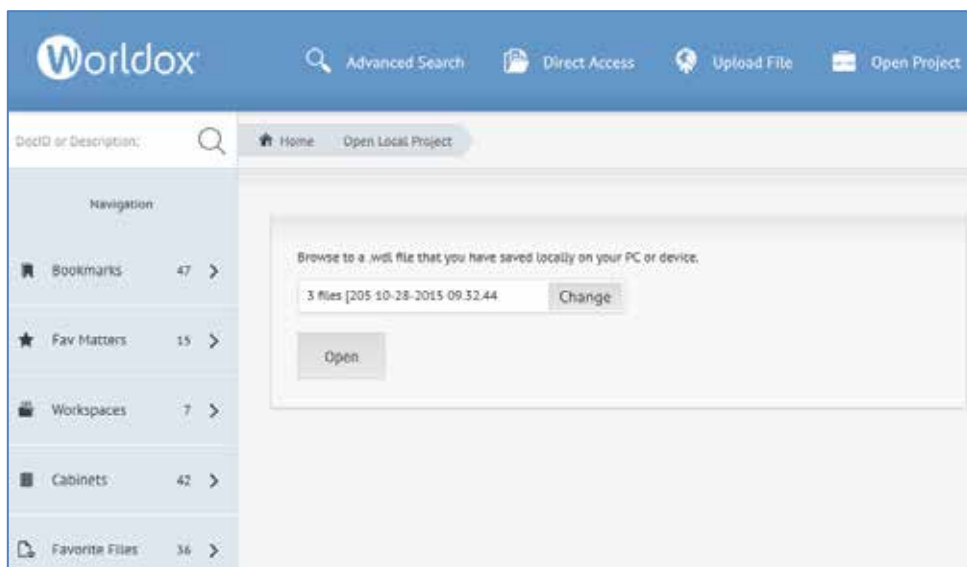
3. Click **Open**. The file or files contained within the .wdl are displayed.
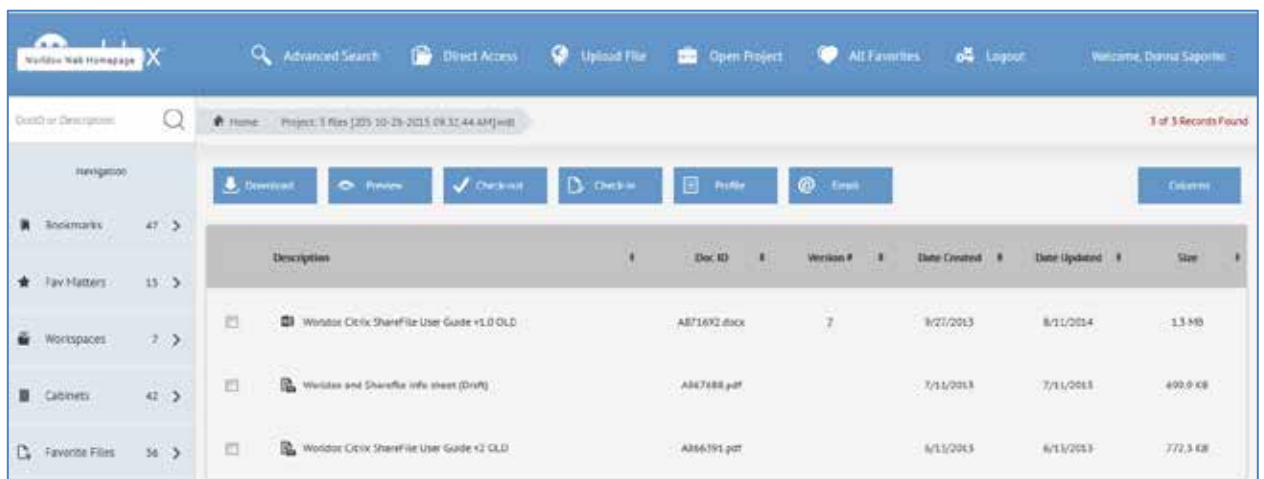
ALL FAVORITES

All Favorites are files you have recently saved or otherwise used. Worldox Web 2.0 "remembers" and lists up to 20 recently accessed files in each *Favorites* category.

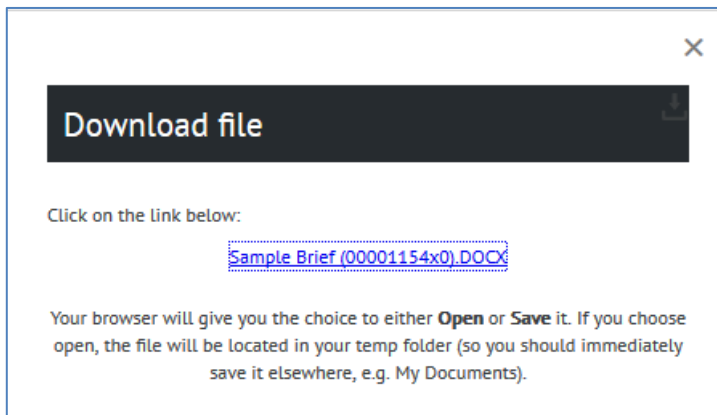Click the **All Favorites** option to open a list of all favorite files.
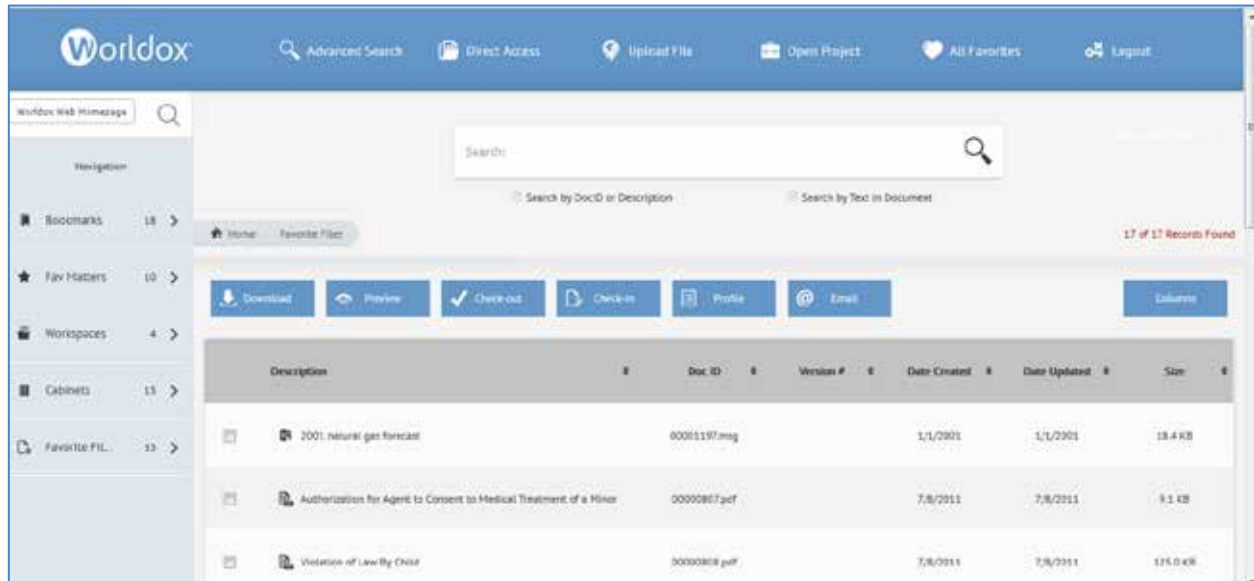
DOWNLOADING A FILE
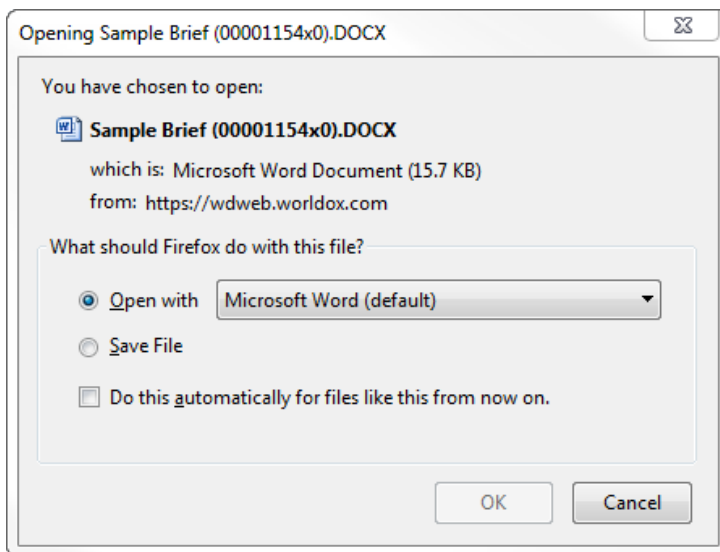
To download a file from Worldox Web, do the following:

1. Click a file in the list and then click the **Download** button.
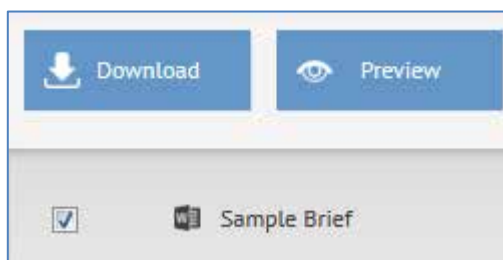
2. The Download File dialog appears.

3. Click the link to the file. A dialog prompts you to open or save the file. Choose one of those options and then click **OK** to complete your download.

PREVIEWING FILES

You can view the content of files in Worldox Web without actually opening them. You do not even need to have the software that created those files installed.

1. To preview a file, click a file in the list and then click the **Preview** 👁 Preview button.
2. The selected file then appears in the preview panel on the right side of the screen window.
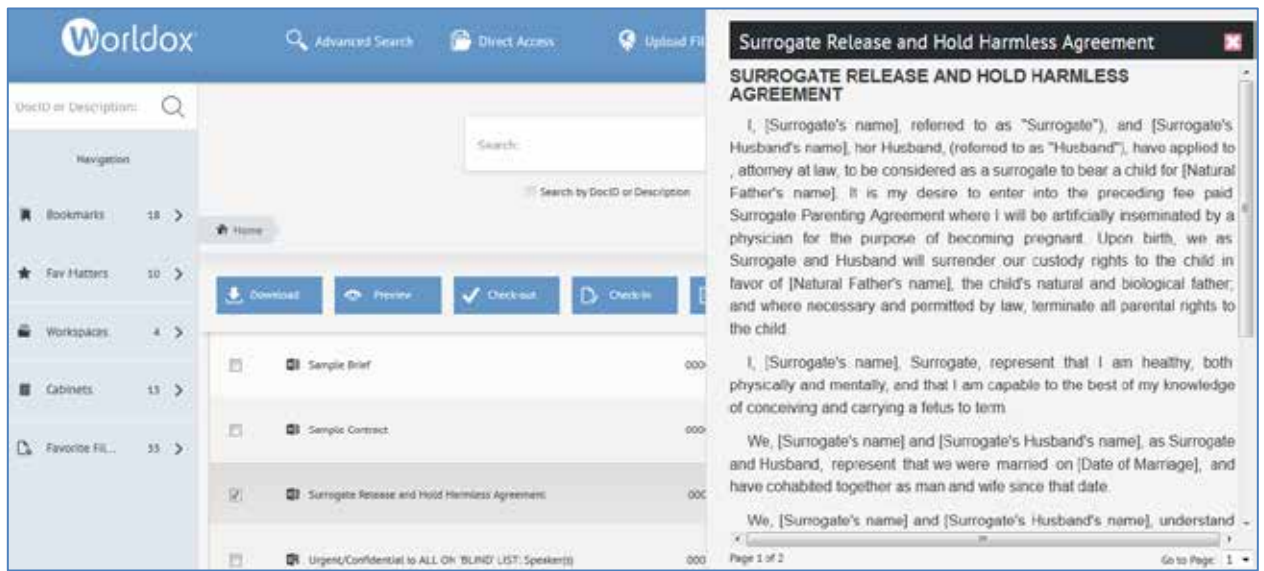
CHECKING IN AND CHECKING OUT FILES

When you check out a file in Worldox Web, it is downloaded to your local machine or handheld device's memory. A check mark icon will be displayed next to the file in the list. All changes you make to the file will be made locally.
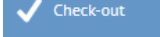
When you check out a file, you are making a copy for your personal use. This personal copy is the one you work with off-line and later check in (complete with any changes made since check-out).

If you are unable to check out a file, it is most likely because another user has already checked out that document or because the document has had Worldox file security applied. You cannot check out a secured, Read-only document unless you are the owner of that file.

§   Files that have been checked out by you have a green check mark icon next to them.

§   Files that have been checked out by another user have a red check mark icon next to them. A dialog appears that informs you that you cannot check out the file if it has been checked out to another user.
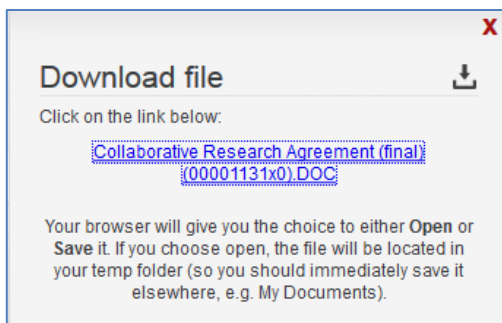
Checking Out a File
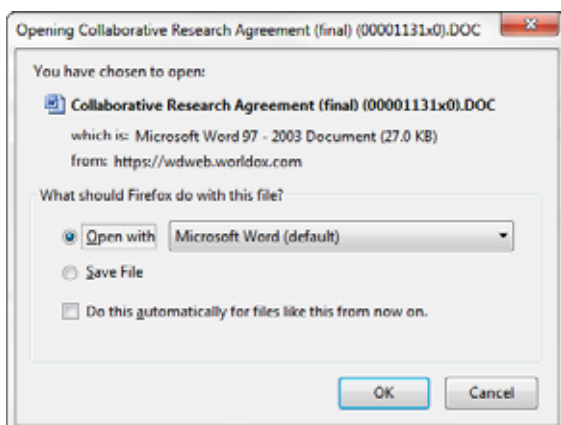
To check out a file, do one of the following:

1. Click a file in the list and then click the **Check Out** [✓ Check-out] button. The Check Out dialog appears.

2. Click **Check Out**.
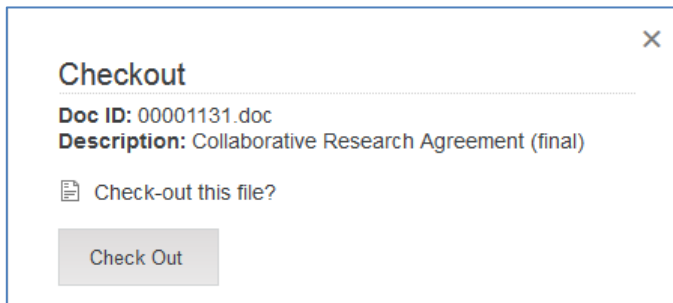
3. The Download file appears next. Click the link to download the file.

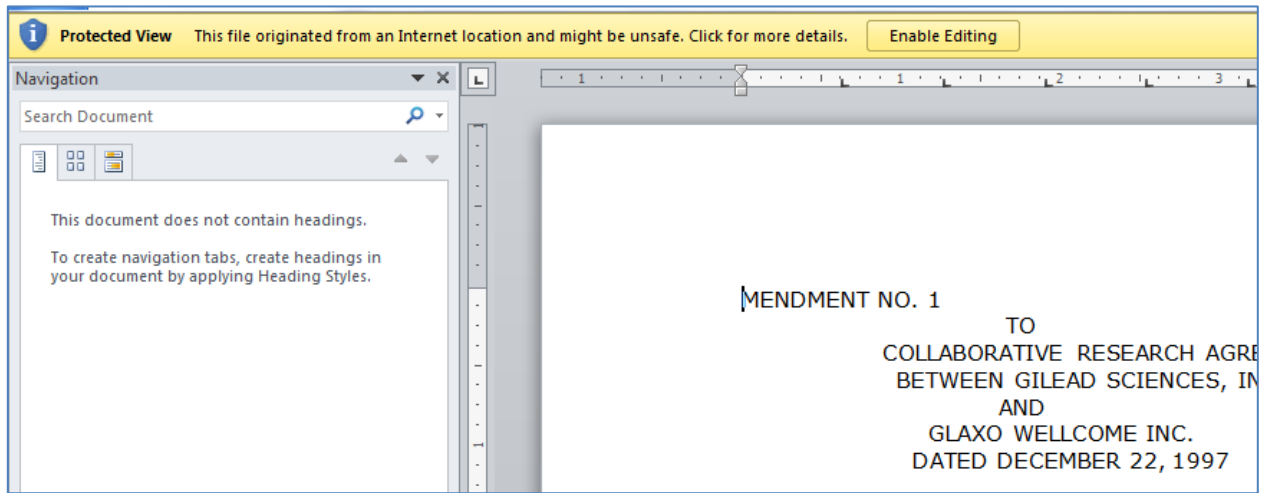4. The next dialog prompts you to either **Open** the file or **Save** it.

Select one of the following:

- § **Open** with to open the file in its native application

or

- § **Save File** to save the file to a download location. You can also save the file elsewhere, e.g. My Documents.

5. Modify the file as necessary. You might need to enable editing since you downloaded it from the Internet.

6. After a successful check out, a file notification is placed in the file list.
   - § A notification appears under the file name: "Checked-Out by User_name".
   - § A green check mark icon appears next to the file name.

Checking In a File

To check in a file, do one of the following:

1. Place a check mark next to the checked-out file in the list and click the **Check In** button. The Check-In dialog provides the following options.

    §   **Replace over on-line original**. (Browse to the file you edited while it was checked out.)

    §   **Add as a new version**. (Browse to the file you edited while it was checked out.)

    §   **Discard off-line copy and revert to original**. (You do not have to upload a file in this case.)
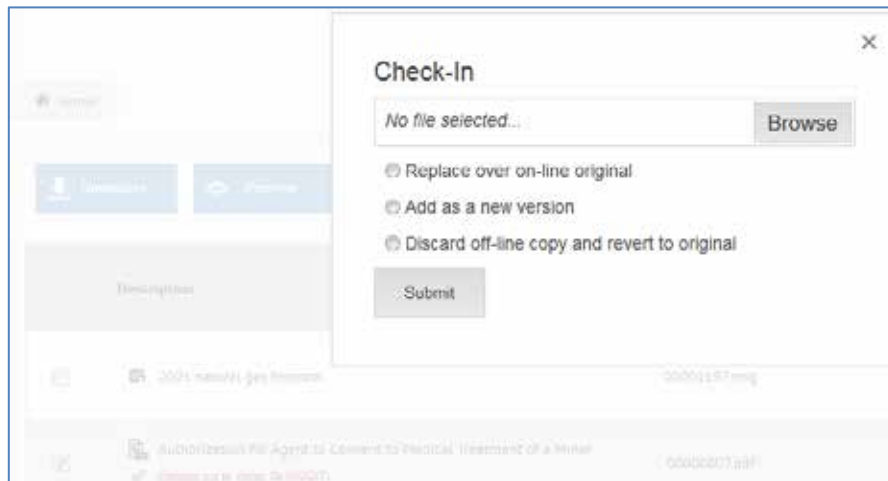
2. If you select **Replace over on-line original** or **Add as a new Version**, browse to a file and then click **Submit.** Then refresh your browser. The file no longer had the "checked-out" icon or status next to it in the last. The Date Updated column is also refreshed. If you saved the file as a version, the new version number will be displayed in the Version's column.
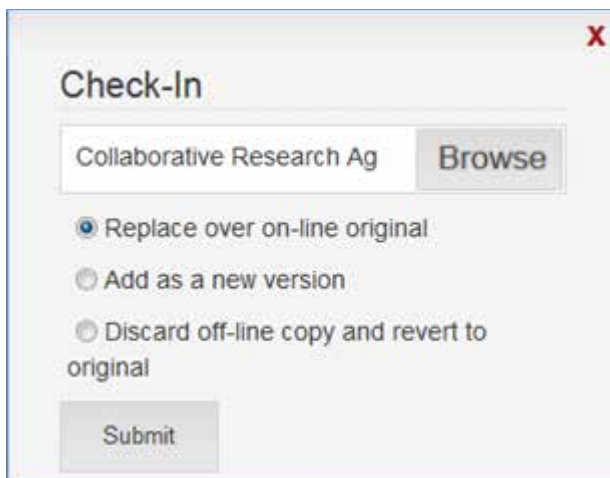
How Check-Out Works with Versioned Files

When a document has multiple versions, checking out that file checks out all versions at the same time. All versions of a checked out file are protected during the check out, and are available to other users during that time as read-only documents. You *cannot* make successive versions of a document when you are working off-line (not connected to the network). The opportunity to version the changed document comes when you check it back in:

§   You can make any changes needed in a file that has been checked-out – off-line, locally.

§   When you reconnect to your network, you can check the file back in as a new version.

§   The changed file becomes the new version, leaving the pre check-out version unchanged.

When You Cannot Check Out a File

If you are unable to check out a file, it is most likely because another user has already checked out that document or because the document has had Worldox file security applied. *You cannot check out a secured, read-only document unless you are the owner of that file or have been granted security rights to it.*

Note: File ownership in Worldox typically moves from user to user, residing with the person who has most recently accessed the file. Worldox Managers and Administrators have the ability to set specific users as file owners. They can also separate full security rights to documents from ownership. If you have any questions on file ownership, please contact your Worldox Administrator, or call Technical Support.

Avoiding Check in Problems

Checking files out - then checking changed files back in - is an essential part of working with Worldox-managed documents off-line (disconnected from the network on which the Worldox application runs). It is also an essential part of working with Worldox files.

Although checking in and out files is a fairly intuitive process, even experienced users sometimes misjudge the effect of one check-in setting. This section describes how you can avoid overwriting a file by mistake.

Check-in, check-out operations are not hard to grasp. Problems sometimes do arise on the check-in step, at the File > Check-In dialog. This is what you see upon checking in a file that has been changed offline:
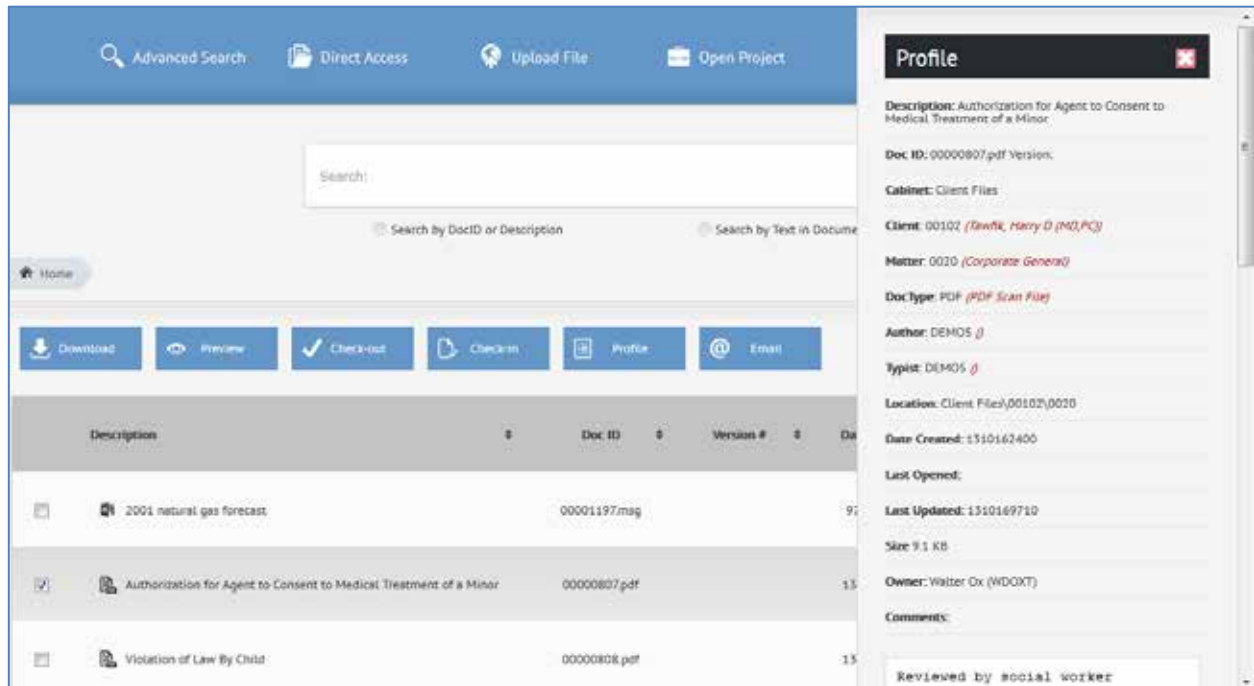
The third choice, **Discard local mirror copy and revert to original**, sometimes causes confusion. Some Worldox users understand "mirroring" better than others. In essence, this choice is saying "I want to disregard this modified version. Please overwrite it with the last version of this file that Worldox knows about." That last version would be the file as it was before it was checked out.

That's probably *not* what most users would choose to do, though it is a sensible option under certain conditions. Some users misunderstand and select that third option (**Discard local mirror copy and revert to original**), thinking that they are replacing the old, pre-check-out version with this new one. In fact, the opposite happens, causing an unwelcome surprise.

VIEWING PROFILE INFORMATION

To view profile information, click a file in the list and then click the Profile [≣ Profile] button.

The Profile panel opens, where you can view the Description, Doc ID, Cabinet, associated profile fields, location, dates created, opened, updated, etc.

EMAILING A FILE

1. To email a file, check it in the list and then click the Email [@ Email] button.
2. The Email panel appears. Enter an address in the To field. Optionally, add addresses in the Cc and Bcc fields or text in the Body field.
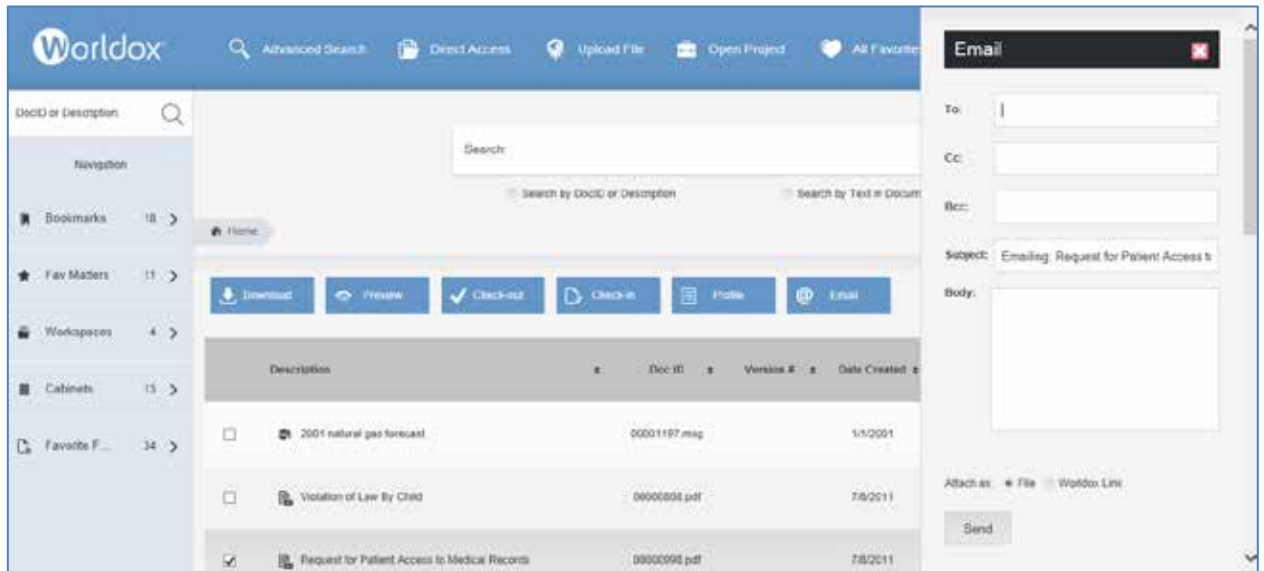
3. Choose one of the following Attach as options:

    §   **File:** Use this for emails to recipients outside the firm. This attaches and sends a copy of the entire file.

        Note: When working with attachments, the message itself – as well as any changes made to the attachment – must be saved. Even though changes in the opened attachments may have been saved, they will be lost without actually saving the message when closing it.

    §   **Worldox Link (internal use only):** This sends a link(s) to recipients. When the link is opened, the network copy of the document is opened. At that point, the recipient is live on the network and not in a temporary email attachment. After making this selection, the recipient can rename the document if necessary.

4. Click **Send.** The Email panel confirms that the file was sent successfully.
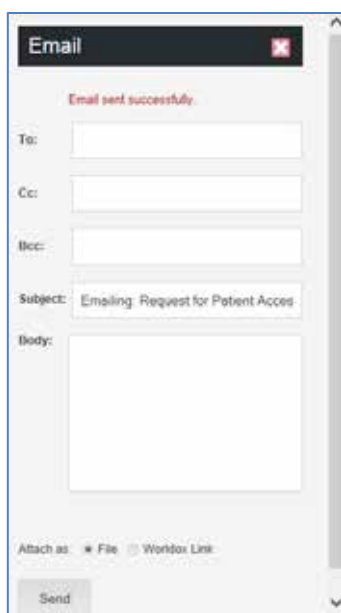
DELETING A FILE

If you have permission enabled in WDADMIN.exe for the Delete feature, you will see a Delete button in Worldox Web's command menu.

1. To delete a file, check it in the list and then click the **Delete** [✖ Delete] button.
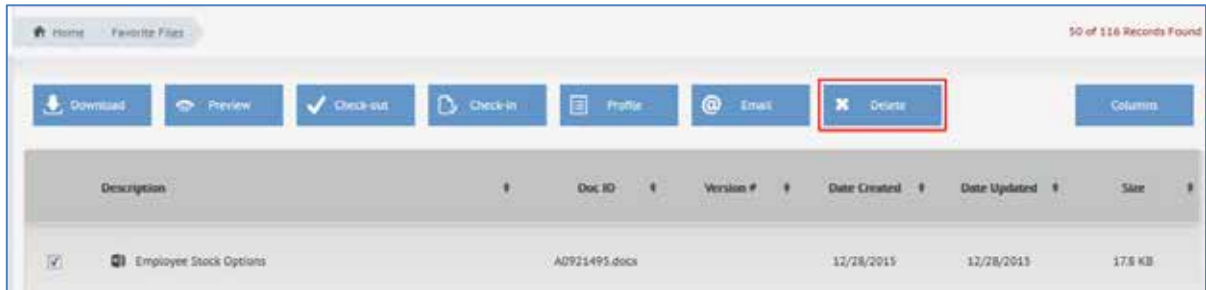
2. The Delete Conformation dialog appears. It says you cannot restore the file after you have deleted it. Check the **Continue** box and select **Yes**. The file is removed from Worldox. You will no longer see it in the file list in Worldox Web or other versions of Worldox (Worldox Enterprise, Worldox Cloud, Worldox for iPad, etc.).
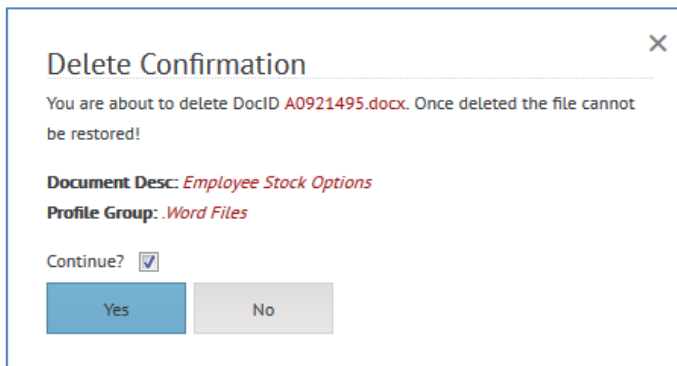
BOOKMARKS

Bookmarks are shortcuts to frequently-used folders, Favorite File lists and previously-accessed searches. Bookmarks are found in a list under the Bookmarks menu, and in "pinned" folders on the bookmarks bar under the Worldox toolbar. This bookmark toolbar can expand to multiple lines to accommodate bookmarks.
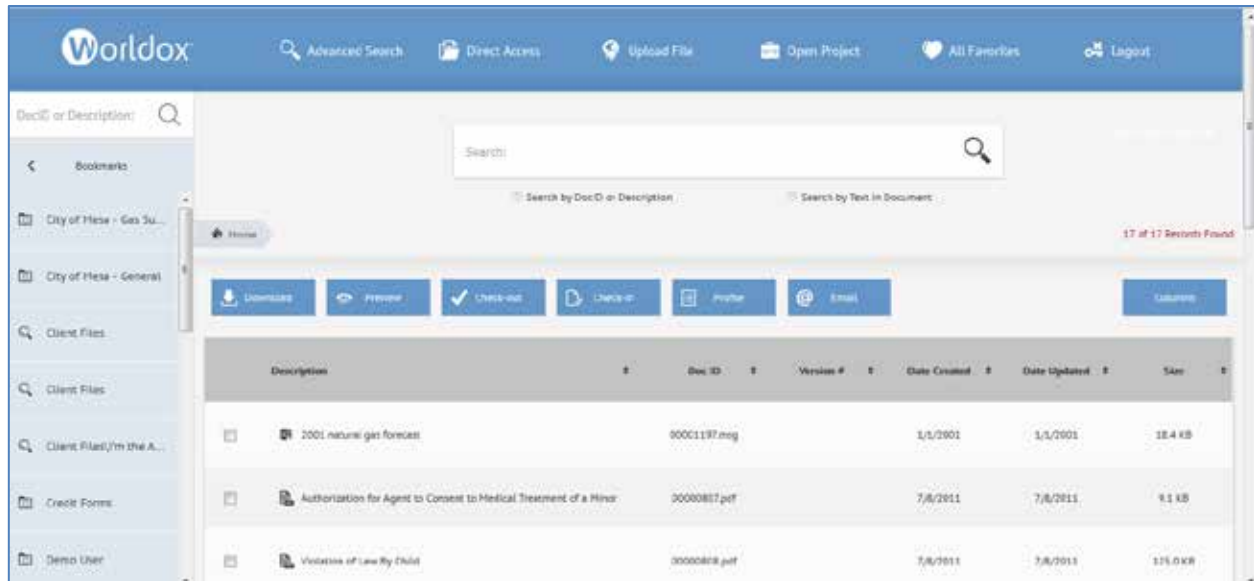
FAVORITE MATTERS

Follow Me Favorites technology knows which files you worked on recently and then presents these choices for quick filing and navigation. *Favorite Files* in Worldox are files you have recently saved or otherwise used. The All Favorite files list is dynamic and changes as you use or no longer use certain files. As files are added to your All Favorites list, the locations that comprise these files will now become available as Favorite Matters. The same Favorite Matter will automatically create correlating drop folders within Microsoft Outlook as well. Your Favorite Matters will also appear in other Worldox products such as Worldox on the iPad or iPhone, Worldox/Web 2.0, or an MFP such as the Canon Connector or other 3rd party products that support Follow Me Favorites.

Favorite Matters are compilations of Favorite File locations. You can view Favorite Matters in a number of places, such as the Navigation Panel, Microsoft Outlook drop folders, and Favorite Matters tabs on certain dialogs.
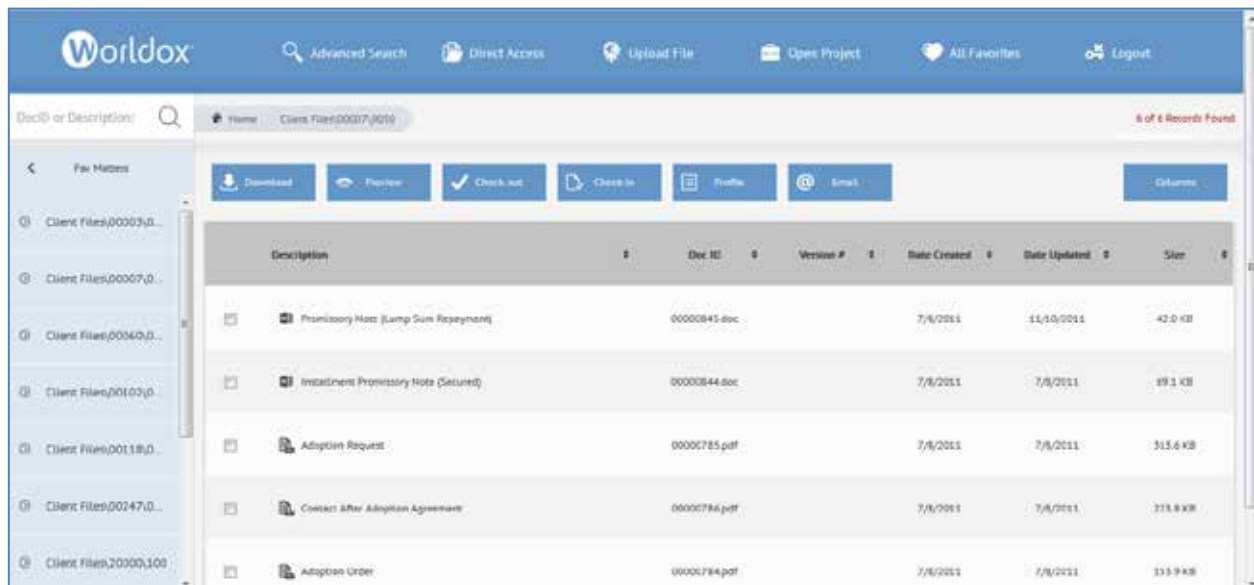
WORKSPACES

Personalized Content for Easy Access and Sharing

My Workspaces is a way to share projects and files in Worldox, as well as an alternative for creating and managing projects. It is accessed by clicking **Workspaces** in the left navigation panel.

There are three important benefits:

§ My Workspaces is a way to focus on important items – bookmarks, Cabinets, shared workgroup files – to keep these items visible and easily accessible in the left-side panel.

§ My Workspaces is an alternative for creating and managing projects.

§ My Workspaces opens the door to workgroup sharing, via the special User Files Cabinet that is available by default in Worldox, assuming your Administrator has not changed it.

Content eligibility for My Workspaces is based on based on Cabinet settings. One or more Cabinets at your site may be eligible for **subscription**, meaning you can choose to add My Workspace links to folders, projects, search forms and views for that group.

Click **Workspaces** in the Navigation Panel. Then click a Workspace to view files contained within it.
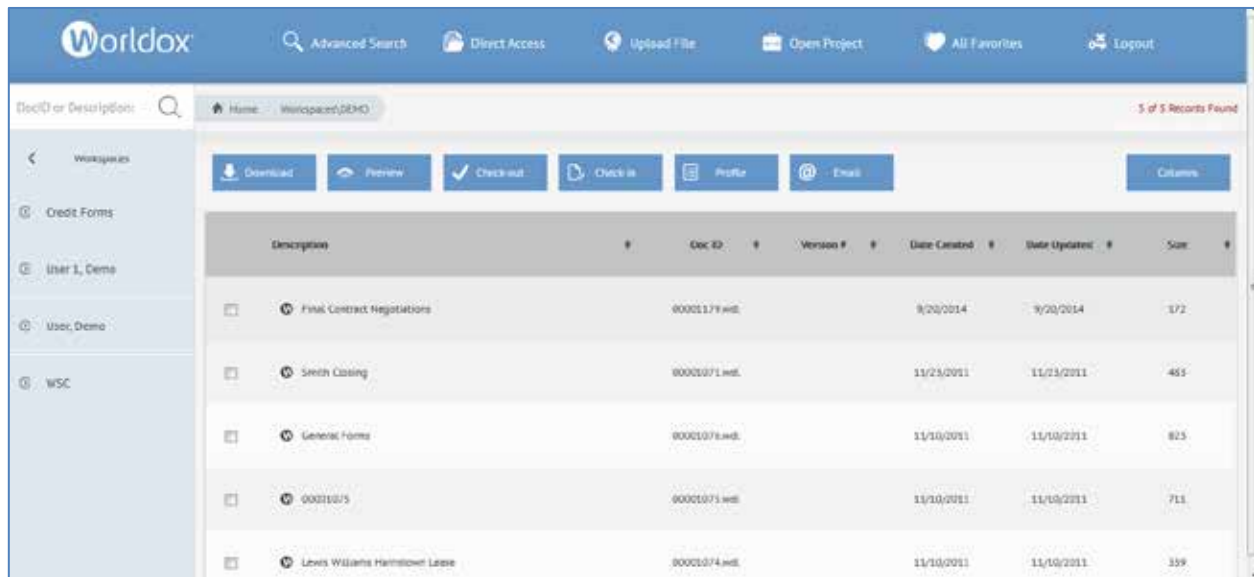
CABINETS

The Cabinets tab lists all cabinets to which you have access. Please note that Cabinets were referred to as Profile Groups in previous versions of Worldox.

1. Click **Cabinets** in the Navigation Panel. Then click a Cabinet name (for example, **Client Files**). A folder list appears.
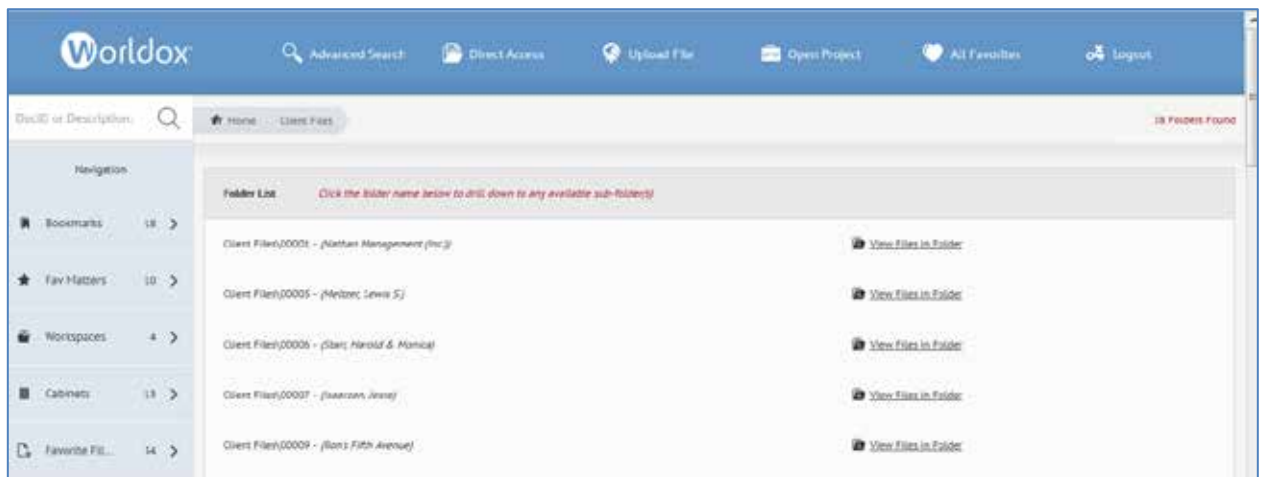
2. Click a folder name (for example, Client Files\00001) to access any sub-folders.
3. Click **View Files in this Folder** to view a file list.

FAVORITE FILES

In the Navigation Panel, click **Favorite Files**. The Navigation Panel then displays a list of categories (for example, Acrobat, Checked-Out) to which favorite files have been assigned. Favorite Files are files you have recently saved or otherwise used.

Worldox Web 2.0 "remembers" and lists up to 20 recently accessed files in each Favorite Files category. Click a category name to see any files that have been assigned to that category.
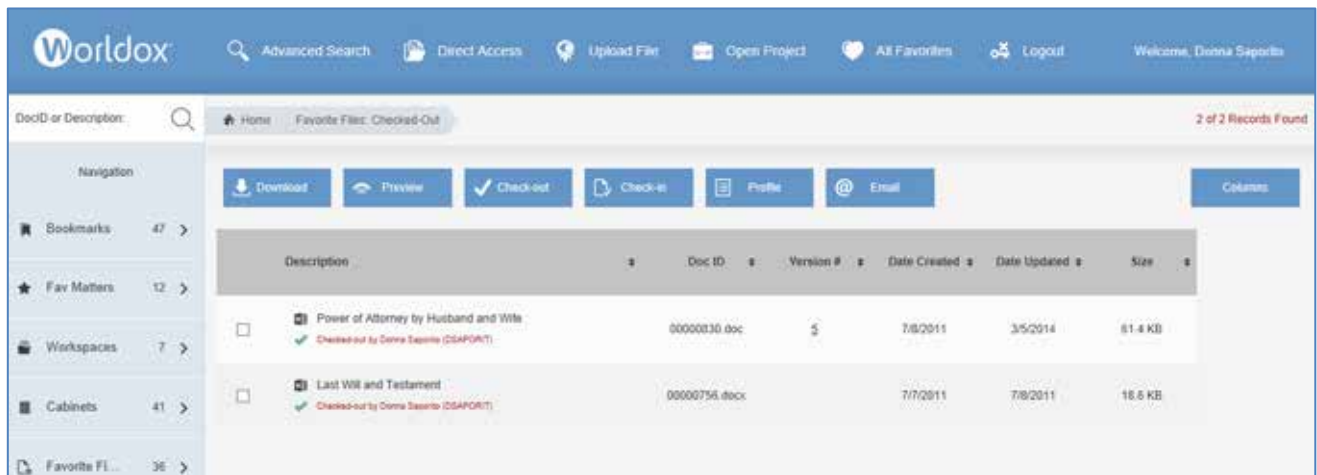
USING FIELD CODE TABLES IN WORLDOX WEB 2.0

This section describes how to use field tables in Worldox Web 2.0 to return values while you fill out forms (for Direct Access, Searches, etc.).

Field Code Table Access and Value Return

You can access field code tables from the Advanced Search templates, Direct Access and Upload Files forms.

1. To access a field code table, click the icon to the left of the field name.
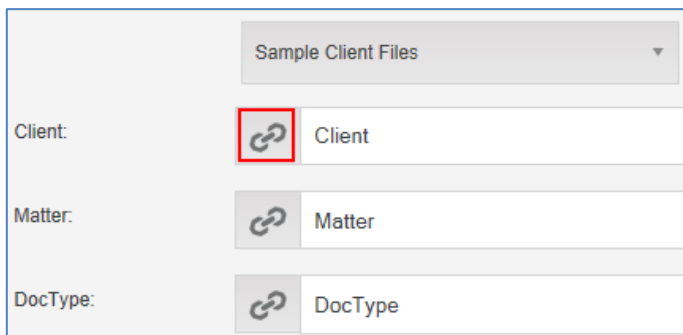
2. In the field code table, check a box next to a value.
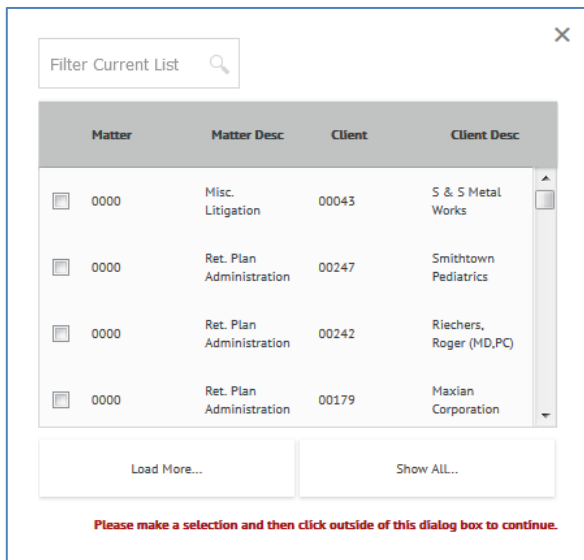
Note: Field tables that have many listings provide **Load More** or **Show All** options if you need to view more listings than the ones that are initially displayed.

3. Click outside the dialog to view the value in the form's field.
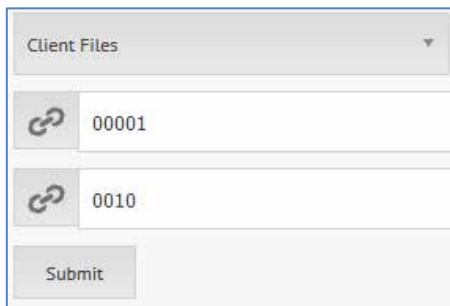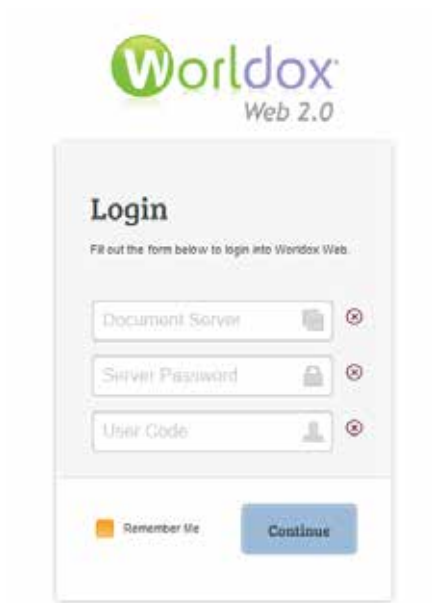
CHANGING YOUR PASSWORD FOR WORLDOX WEB 2.0

This section describes how to change your password for Worldox Web 2.0. You must receive a confirmation email to reset a password so that you can fill in your own credentials. The email portion of the Web Server must be configured and each user account must have an assigned email address. The screens use sample data.

1. Access the Worldox Web 2.0 login page by doing the following:
   § Type the URL of your Worldox website in your browser's address bar, for example, https://wdweb.worldox.com. The Login screen appears.
   § If you are already using Worldox Web 2.0, select the **Logout** toolbar button. Then refresh your browser and sign in again.
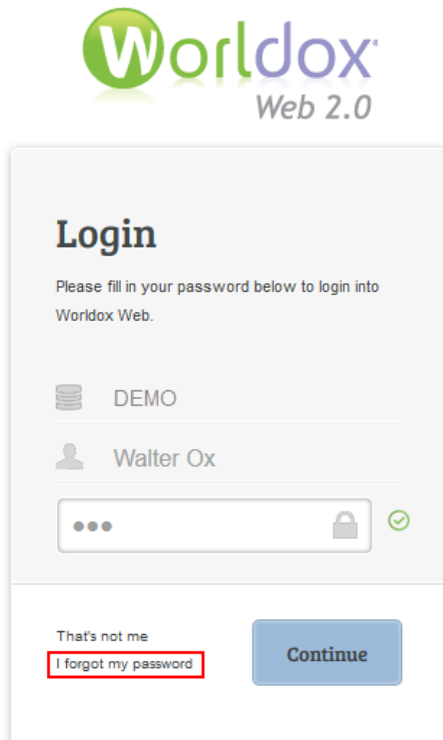
2. In the Worldox Web Login screen, enter the **Document Server**, **Server Password** and **User Code**.

3. Click **Continue.** The User Validation screen will load.

4. Click **I forgot my password** to begin the password reset process.

5. Worldox Web reset password screen appears.

6. Enter your email address in the first blank field, and then re-enter it to confirm in the second blank field.

7. Click **Reset Password.** A dialog informs you that instructions for resetting your password will be sent to you.

Note: This screen also provides the **Confirmation Key** that you will need in order to change your password.
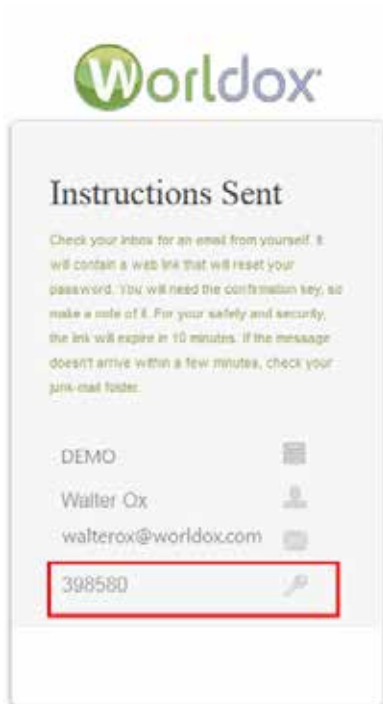
8. You must check your email Inbox for the email Worldox Web Server sent upon the request. The Email subject is Worldox Web Password Reset. The email contains the following information:

   § URL Link to click on

   § Time limit given. You must reset your password within 10 minutes of receiving your confirmation key. If you attempt to reset your password after that ten-minute time frame, you will be notified of a time expiration error. If a password reset link has expired, an error message states, "This request has expired."

   § IP Address which requested the Email

9. Open the Worldox Web Password Reset email and click the URL link. The Reset Password Screen is then loaded in to Worldox Web 2.0's browser.

10. Enter your **Confirmation key, then enter your new password and then re-enter your new password.**

11. The new password is changed, along with a duplicate confirmation password.
12. Click **Save**. The next dialog confirms that your password has been changed.
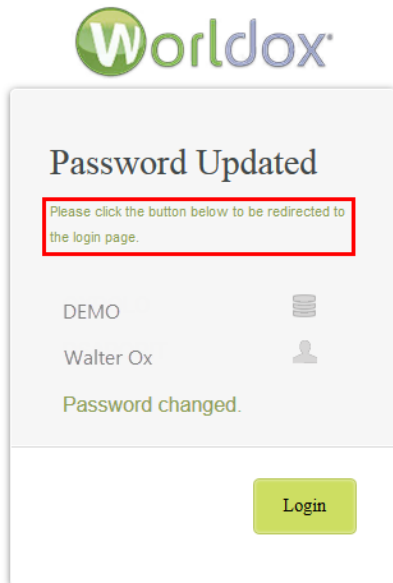
WORLDOX WEB 2.0 ON A HANDHELD DEVICE/SMARTPHONE

Worldox Web 2.0 provides the same functions on handheld devices that it does on the PC browser. However, due to smaller screen resolutions on handheld devices, there are some differences in the way that certain menu options, file commands, the Navigation panel, or columns are displayed.

This section describes some differences between the screen layouts of the PC Browser version and Android and iPad devices.

Note: If you have the Worldox for iPhone or Worldox for iPad applications installed on those devices, it is preferable to use those applications instead of navigating to https://wdweb.worldox.com to use Worldox Web.

In the PC browser version of Worldox Web, the screen is large enough to display the full Navigation panel, as well as toolbar options (Advanced Search, Direct Access, Upload File, Favorite Files and Logout), and file command options (Download, Preview, Check-out, Check-in, Profile, and Email).
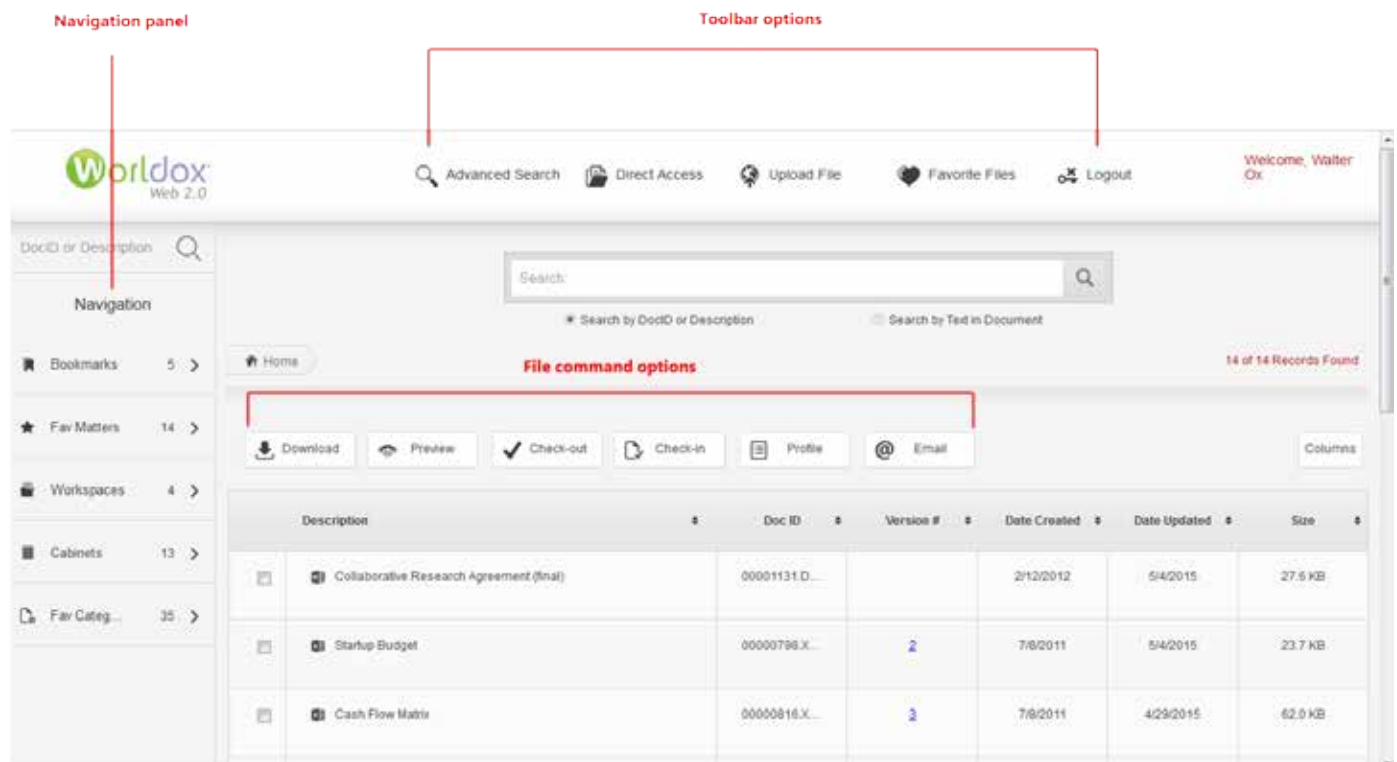
Worldox Web 2.0 on a PC Browser

On iPads, Android tablets, iPhones and Android smartphones, you need to click certain icons to view the Navigation Panel, toolbar options and file commands.

VIEWING THE NAVIGATION PANEL ON AN IPHONE, ANDROID SMARTPHONE, IPAD, OR ANDROID TABLET

The way to view the Worldox Web 2.0 Navigation panel is the same on all handheld devices.

The following example shows the Worldox Web 2.0 home screen on an iPad. Please note that you must click the ☰ ("hamburger") icon to the left of the Worldox Web 2.0 logo to display the Navigation panel.
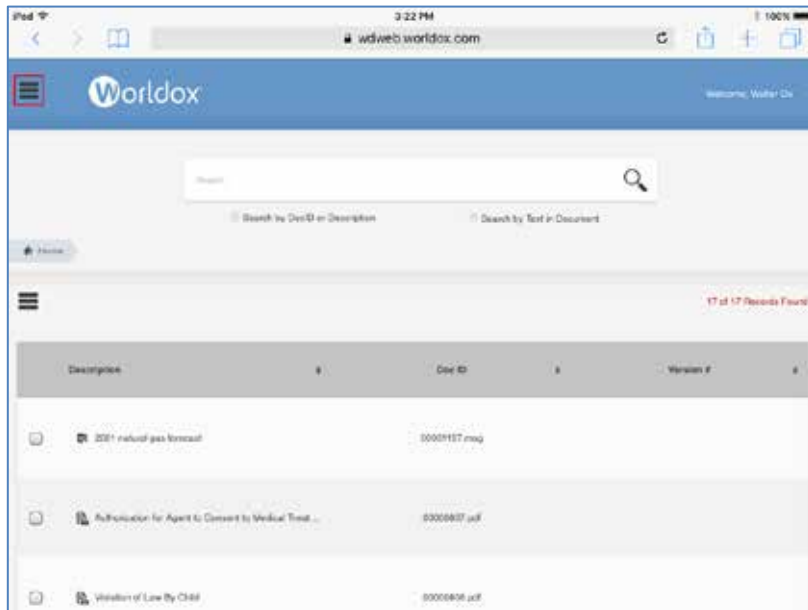

The Navigation panel appears.
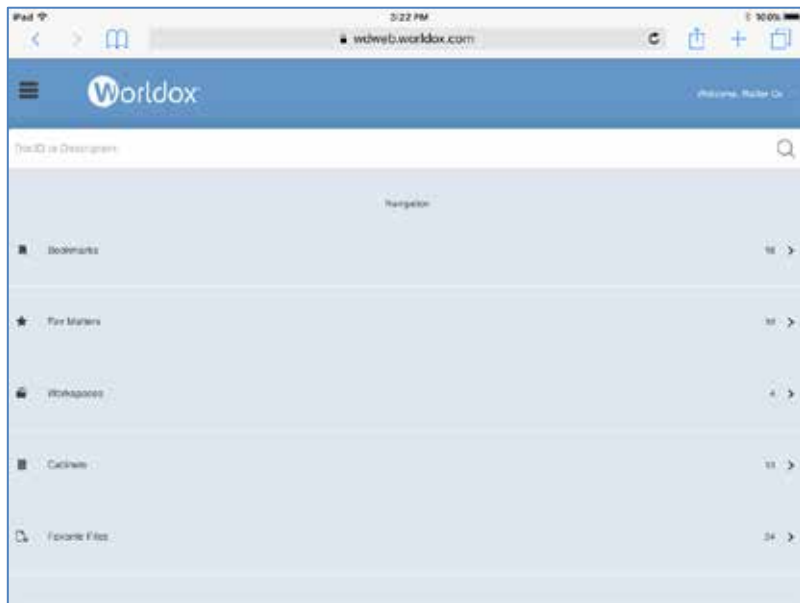
If you want to close the Navigation panel, simply click the ☰ ("hamburger") icon to the left of the Worldox Web 2.0 logo again.

VIEWING THE TOOLBAR OPTIONS ON AN IPHONE, ANDROID SMARTPHONE, IPAD, OR ANDROID TABLET

The way to view the Worldox Web 2.0 toolbar options is the same on all handheld devices.

The following example shows the Worldox Web 2.0 home screen on an Android smartphone. Please note that you must click the down arrow [⌄] icon on the top right side of the screen to view the toolbar options (Advanced Search, Direct Access, Upload File, Favorite Files, and Logout).
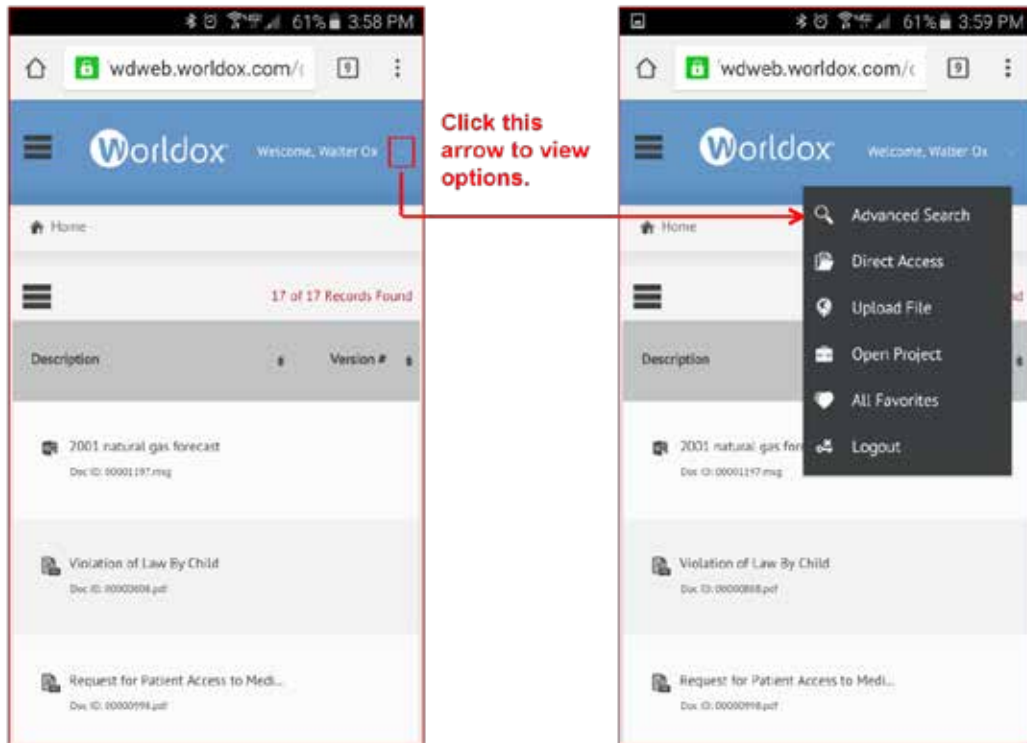
If you want to close the toolbar options, simply click the down arrow [⌄] icon again.

VIEWING THE FILE COMMAND OPTIONS ON AN IPHONE, ANDROID SMARTPHONE, IPAD, OR ANDROID TABLET

The way to view the Worldox Web 2.0 file command options is the same on all handheld devices.

The following example shows the Worldox Web 2.0 home screen on an iPad. Please note that you must click the second ☰ ("hamburger") icon above the file list to display the file command options.
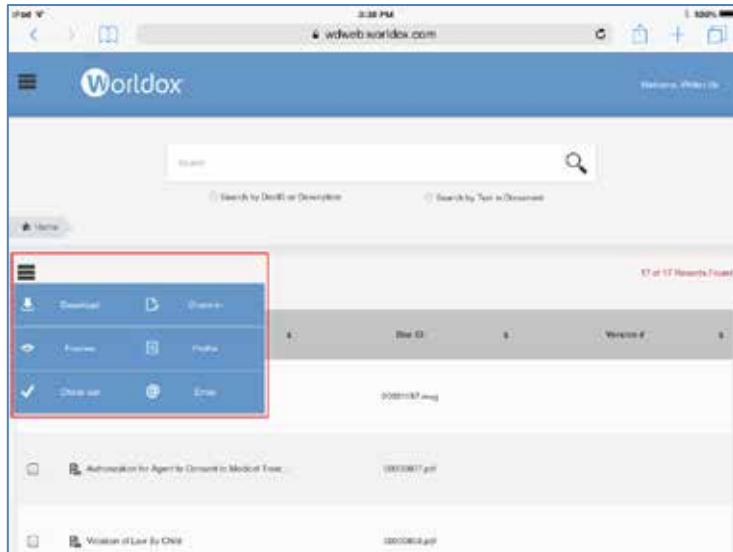
If you want to close the file command options, simply click the ☰ ("hamburger") icon above the file list again.

Note: If you have permission enabled in WDADMIN.exe for the Delete feature, you will see a Delete option in Worldox Web's command menu.
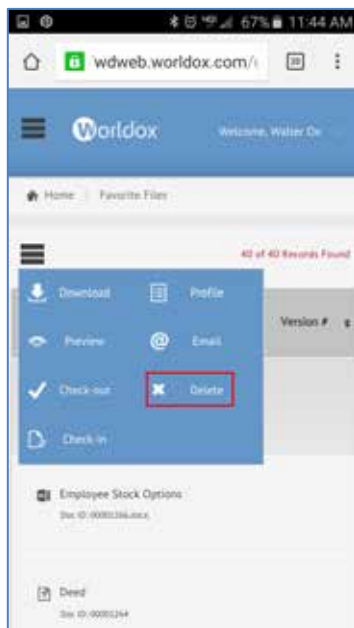
SELECTING A ROW ON AN IPHONE OR ANDROID SMARTPHONE

Check boxes do not appear next to file names in lists on iPhones and Android smartphones. Whenever you select a row on those devices, it is highlighted in gray.
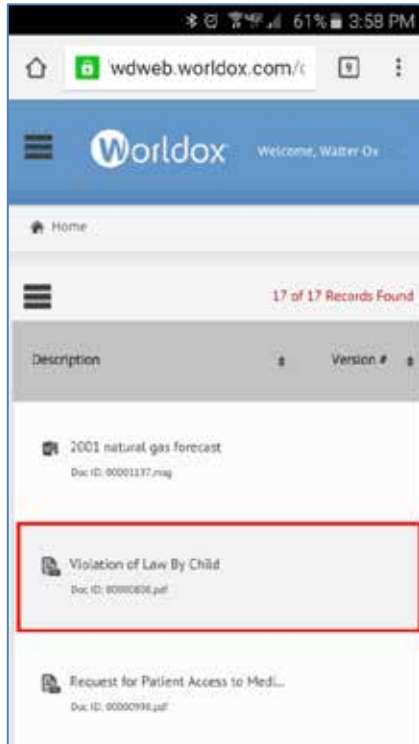
SEARCHING FOR DOCUMENTS ON AN IPHONE OR ANDROID SMARTPHONE

Due to the smaller screen resolution on iPhones and Android smartphones, there is no Search bar on the Home screen. You can click the menu to use the **Advanced Search** option.
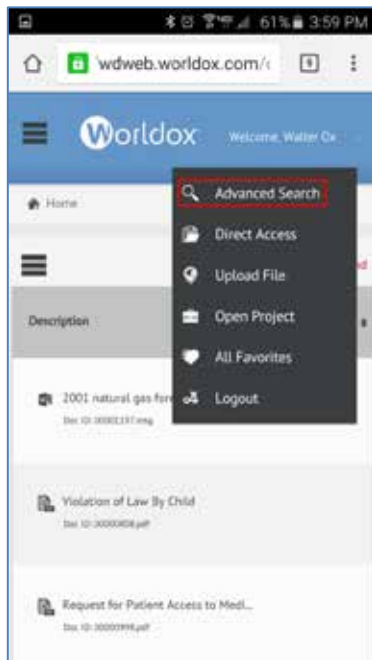
You can also use a **DocID or Description** search bar in the Navigation Panel on those devices.
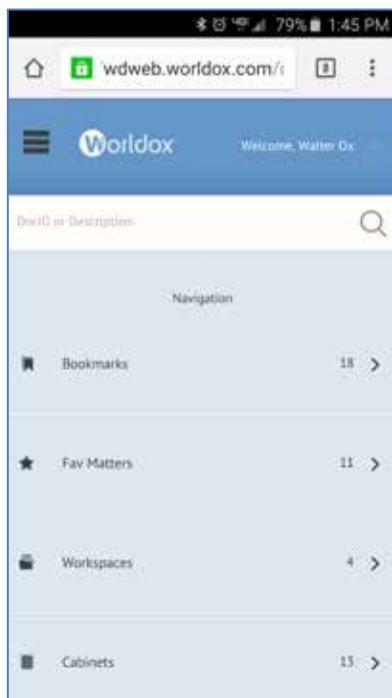
COLUMN DIFFERENCES BETWEEN THE PC BROWSER AND HANDHELD DEVICES

Due to smaller screen resolutions, handheld devices cannot display as many columns in Worldox Web as the PC browser version can.

iPads and Android tablets show the Description, Doc ID and Version # columns by default.
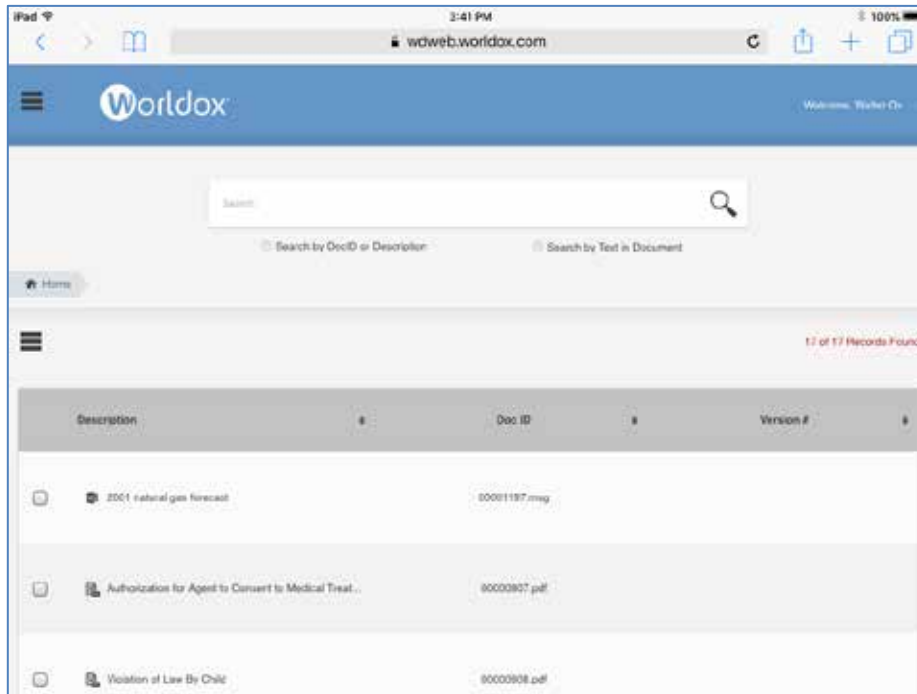
Android smartphones and iPhones show the Desc and Version number columns. They also show the Doc ID directly under the file name.
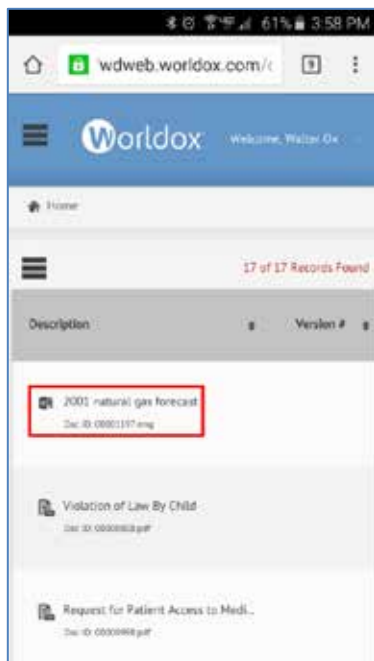
VIEWING COMMENTS ABOUT A FILE ON AN IPHONE, ANDROID SMARTPHONE, IPAD, OR ANDROID TABLET

Due to smaller screen resolutions, there is no option to add a Comments column in Worldox Web for handheld devices. To view comments about a file, select the file and then the **Profile** file command. You can then scroll down the Profile panel to read comments.
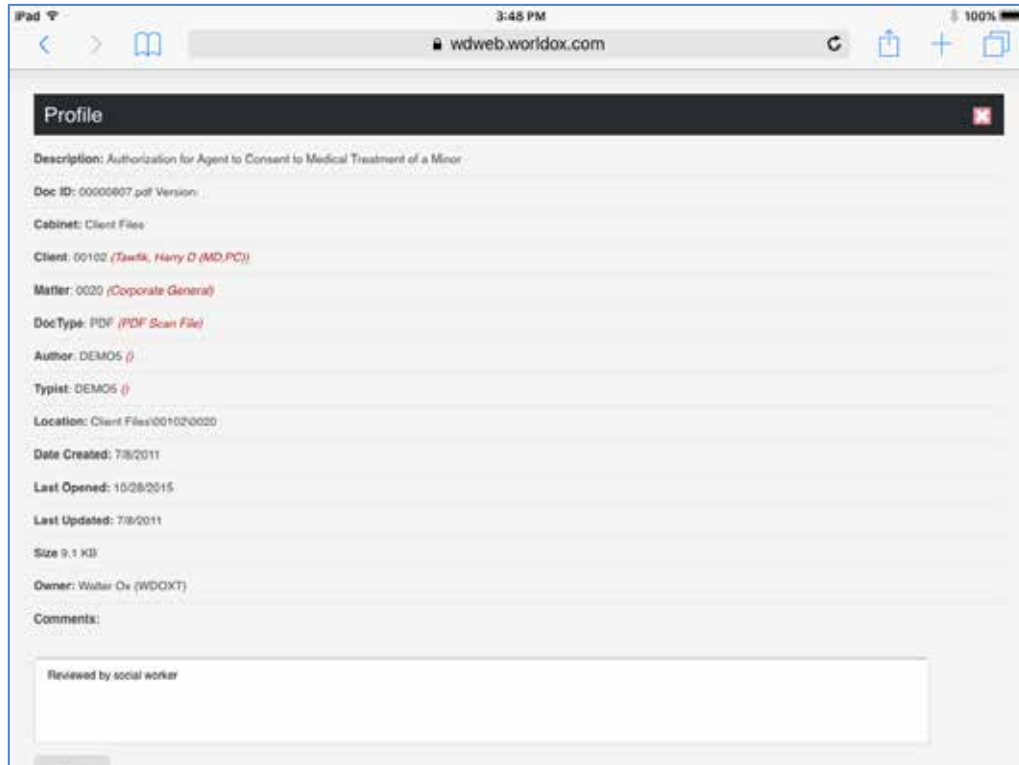
THE UPLOAD FILE COMMAND OPTION ON IPHONES AND ANDROID SMARTPHONES

When you select the **Upload File** command option on an iPhone or Android smartphone, the Quick Profiles and Favorite Matters options appear as tabs at the top of the screen.

In the PC browser version, iPad and Android tablet, they appear as buttons on the right side of the Upload File screen.

OPENING PROJECTS (WDL FILES) ON IPADS AND IPHONES

The Open Project feature in Worldox Web enables you to browse to an internal Worldox file link (.wdl file) that you have saved locally on your PC or device. If you are using Worldox Web on an iPad or an iPhone, you can open the .wdl in the Worldox for iPad or iPhone app.

The Open Project feature is not yet supported on Android devices because a Worldox for Android app must be developed in order to open .wdl files on Androids.

Saving a WDL to an iPad or iPhone

1. Install the Worldox for iPad or iPhone app.

2. You can open an email message with a .wdl file attachment and choose to launch it in the Worldox for iPad or iPhone app.
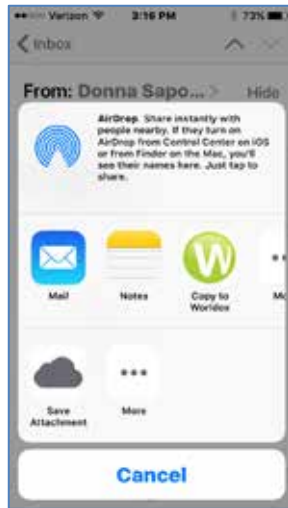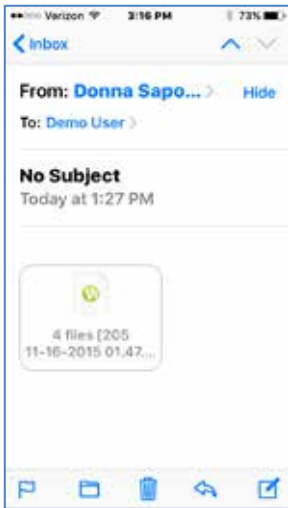
Status messages confirm that you are being connected to WDWEB, rights are being checked, the WDL is uploading, etc.
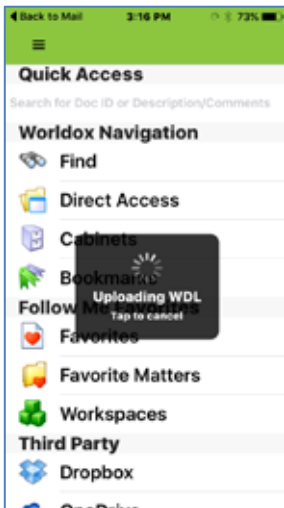
The Worldox for iPhone or iPad app opens the WDL and displays the files contained within it.

Opening a Project in Worldox Web

1. Select the **Open Project** option on the toolbar options drop-down list.
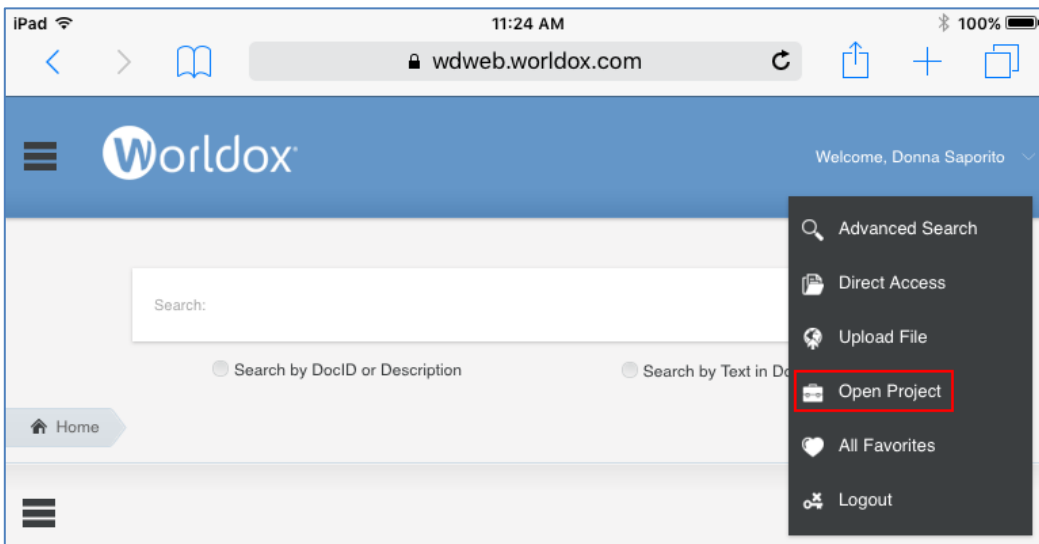
2. The Open Local Project form appears. Browse to a Worldox file link (.wdl file) that is saved locally on your iPad or iPhone.
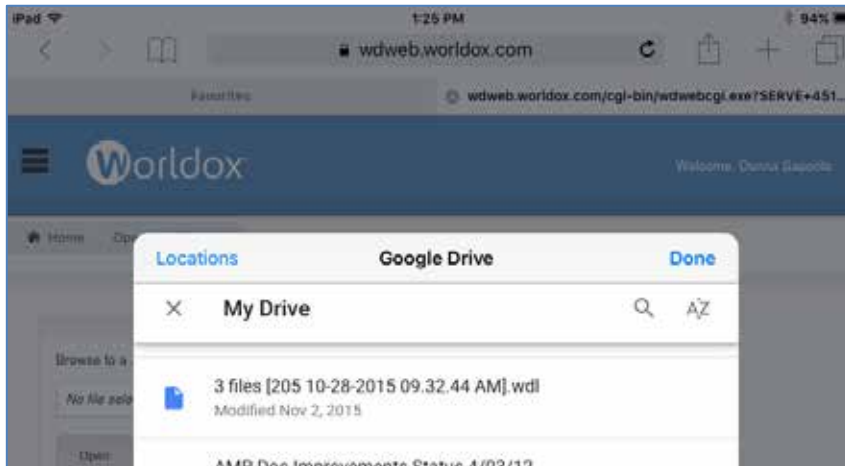
3. Click **Open**. The file or files contained within the .wdl are displayed.
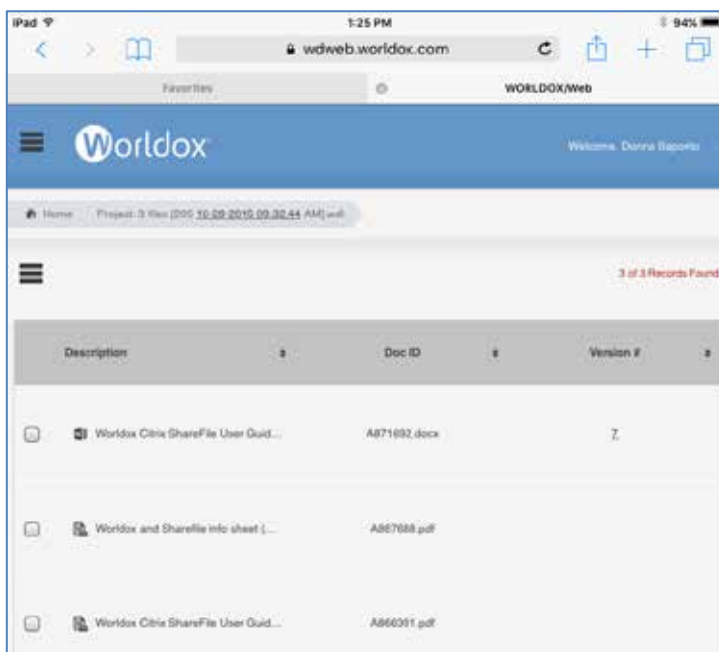
LANDSCAPE NOTE FOR ALL DEVICES

As with most mobile applications, you can view Worldox Web in landscape or portrait modes on your handheld devices.

The following example depicts Worldox Web in portrait mode on an iPad.
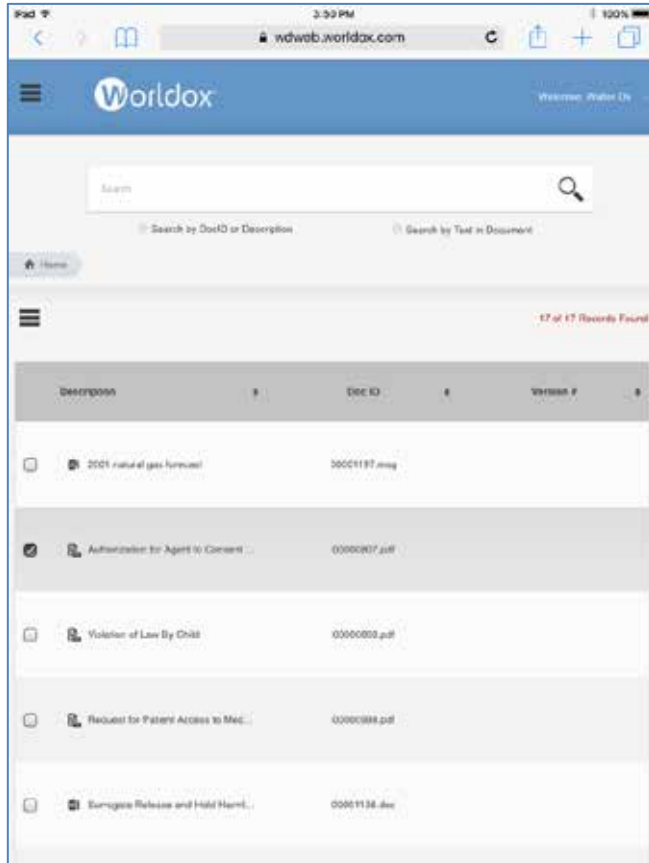
WORLDOX WEB 2.0 ON A SONY DIGITAL PAPER DEVICE

Digital Paper from Sony, in conjunction with Worldox Web, gives you the power to annotate, share, and save your documents from a handy device that's light enough to carry anywhere.
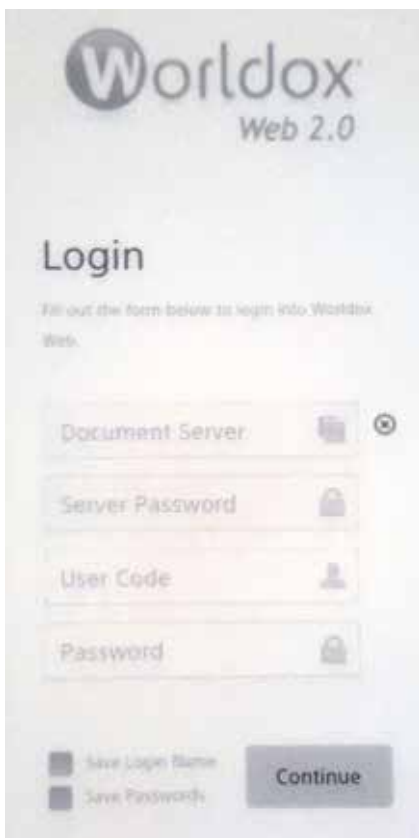
Worldox Web 2.0 provides the same functions on the Sony Digital Paper device that it does on the PC browser. However, due to the different screen resolution on the Sony Digital Paper device, there are slight differences in the way that the Login screen fields, Navigation panel and long file lists are displayed.

Note: The Worldox Web user interface is only displayed in portrait mode on the Sony Digital Paper device. You cannot rotate the screen to landscape mode.

LOGGING IN TO WORLDOX WEB ON THE SONY DIGITAL PAPER DEVICE

The Worldox Web Login screen on the Sony Digital Paper device includes all four login credential fields that you need to populate in order to gain access.

§ Document Server
§ Server Password
§ User Code
§ Password

The PC browser version and handheld devices show only the Document Server, Server Password and User Code fields on the initial Login screen. You must click **Continue** to access a second Login screen where you can enter the final Password.
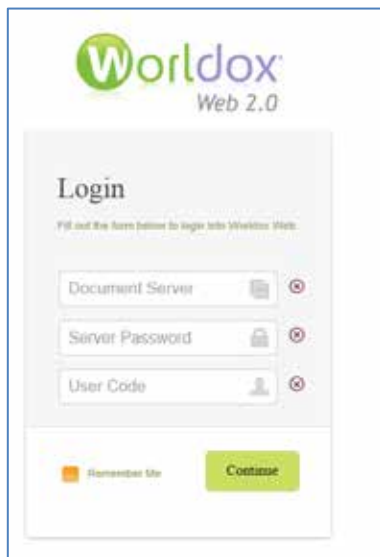
VIEWING THE NAVIGATION PANEL ON A SONY DIGITAL PAPER DEVICE

To view the Navigation panel on the Sony Digital Paper device, click the ☰ ("hamburger") icon to the left of the Worldox Web 2.0 logo.
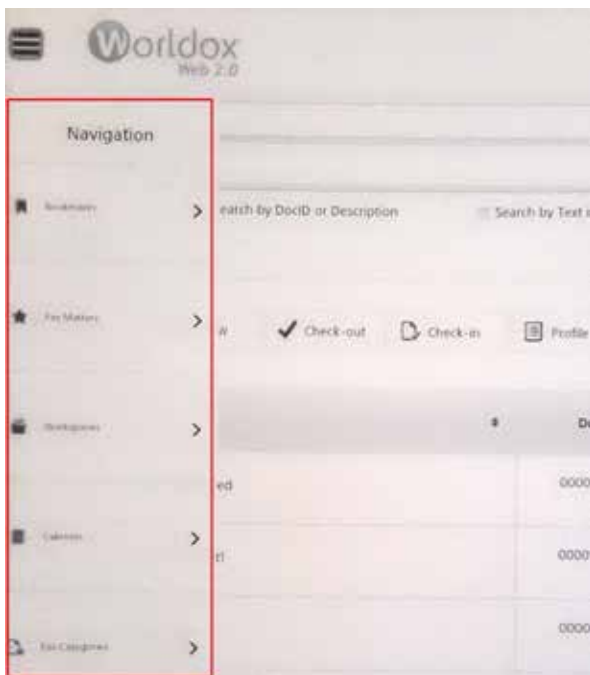
If you want to close the Navigation panel, simply click the ☰ ("hamburger") icon to the left of the Worldox Web 2.0 logo again.

VIEWING LONG FILE LISTS ON THE SONY DIGITAL PAPER DEVICE

To view long file lists on the Sony Digital Paper device, click the page number links at the bottom of the screen.
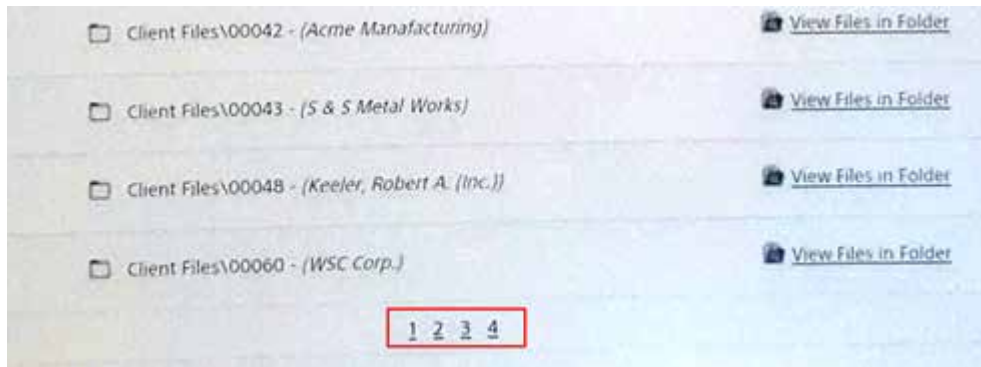
When viewing long file lists on the PC browser version and handheld devices, you must scroll to the bottom of the screen and select a **Load More** option.

LAUNCHING WORLDOX WEB BY DEFAULT ON THE SONY DIGITAL PAPER DEVICE
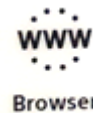
When you initially use the Sony Digital Paper device, the **Browser** icon is displayed on the left side of the home screen. To change this icon to the Worldox Web icon and to use Worldox Web by default, do the following:

1. In your Sony Digital Paper's home screen, select the **Browser** icon on the left side of the screen.

2. After the browser opens enter the URL for Worldox Web.
3. Press the **Menu** button on the bottom of the Sony Digital Paper device.

4. Select the Worldox Web address displayed in the URL address field at the top of the browser's screen.
5. Select the browser's **Settings** button on the lower right side of the screen.

Settings

6. The Settings screen appears.
7. Choose the **Set Home Page** option. Ensure that the URL for Worldox Web is in the field. If not, type it in manually. Then select **Use current page** and click **OK**.
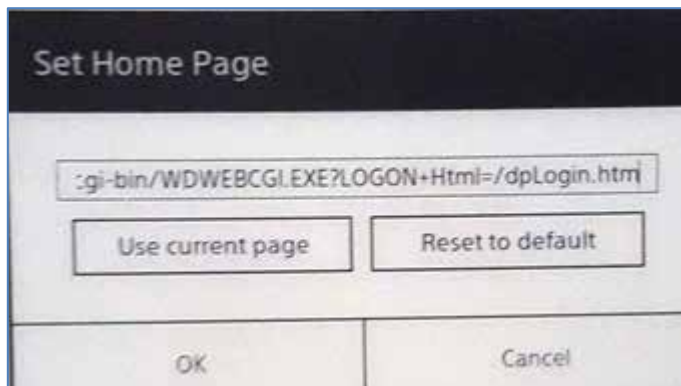
8. The default Browse Home button is changed to the Worldox icon. When you select it from the Sony Digital Paper device's home screen, Worldox Web will automatically be launched in the browser.

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