# Worldox GX4 Cloud Basics and Troubleshooting Guide

Worldox® GX4 Cloud has the powerful features of the Worldox Professional client, but generates even more expediency and flexibility through the utilization of Software-as-a-Service (SaaS) technology and cloud computing. With Cloud, professionals can use Worldox efficiently from virtually any location because you can access it from any computer, laptop or mobile device.

The main difference between using the Worldox Professional client and Worldox Cloud is that when you open a file in Worldox Cloud, the file is checked out, downloaded from the Worldox data center, and opened by the appropriate local application on your computer. Any edits you make to the document are saved to a locally cached copy until the document is closed. Only when the document is closed is it uploaded back to the data center and checked back in.

A status message that says, "Checked-out" will be displayed in the Worldox file list while a given document is open. This prevents other Worldox users from working on the document while you have it open.

Please note that if a file is large, it may take longer to upload it back to the data center after you close it. A dialog box with progress bars may be displayed to indicate that the file is being uploaded.
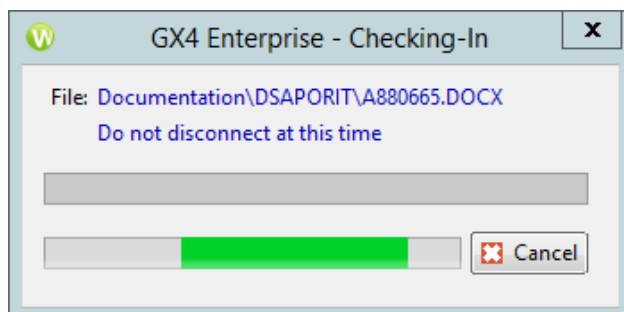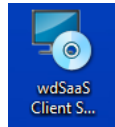

Do not shut down Worldox or your computer until this upload is complete and you have confirmed that the file has been checked in.

Using GX4 Cloud for the First Time

This tip sheet is a quick tutorial to follow when you use GX4 Cloud for the first time.

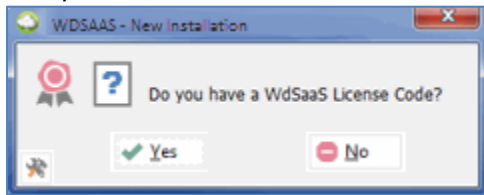|	
1. Install the Application Download the **wdSaaS Client Setup.exe** file from http://www.worldox.com/support/download. Save it to your machine. Run the **wdSaaS Client Setup.exe** file. Follow the installation prompts and accept terms of the license agreement.	**2. Log in to the Application** Double-click the wdSaaS Client icon on your desktop to launch the application. **Note:** The first time you install GX4 Cloud, you will not need to click the wdSaaS icon. The Connecting dialog appears.
3. View Your Internet Connection Status (1) You must ensure that your computer has an adequate internet connection to use GX4 Cloud. (2) Connection quality is displayed in a range from 4 bars (Excellent) to 1 bar (Minimal). (3) If you would like to refresh your test results, choose **Re-Test connection**. **Note:** If your Internet Connection Status does not change, you will not see this dialog again upon subsequent launches of GX4 Cloud.	**4. Troubleshoot Your Internet Connection Status (Optional)** If you need to troubleshoot your Internet connection, please contact your Internet Service Provider (ISP). The required Internet bandwidth is 256KB per user (512KB is recommended).

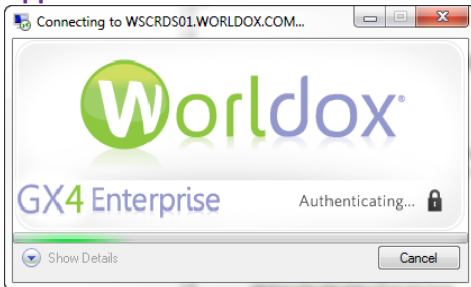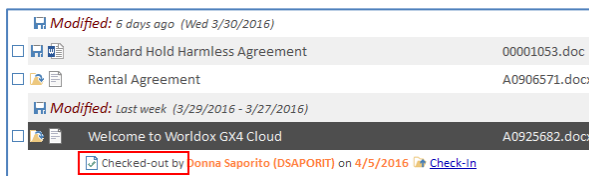|	
5. Enter a License Code If you are installing GX4 Cloud for the first time, you will be prompted to enter a License Code that you received from World Software. ![WDSAAS New Installation dialog: "Do you have a WdSaaS License Code?" Yes / No] A progress dialog displays that the program is being updated.	**6. Enter Your Credentials** Enter the username and password supplied for GX4 Cloud. ![Windows Security - Enter your credentials. Type your user name and password to connect to wscrds01.worldox.com. WORLDOX\dsaporito, Password. Use another account. OK / Cancel]
7. Credentials are Authenticated and the Application is Loaded ![Connecting to WSCRDS01.WORLDOX.COM - Worldox GX4 Enterprise, Authenticating... Show Details / Cancel]	**8. GX4 Cloud Launches** ![GX4 Enterprise - Desktop application window showing file list] Worldox GX4 Cloud uses a thin, PC-based client (25 MB or less) and an Internet connection to a hosted application. It can access all of your Worldox documents on the cloud. The interface and functionality are virtually identical to the normal Worldox on-premise client. A minor difference is a **Connection** ![Connection] tab at the left of the Bookmarks bar, which shows the connection strength.
10. Automatically Check Out and Check In Files When you open a document in GX4 Cloud, it is automatically checked out and downloaded to your local machine. A status message that says "Checked Out" will be displayed in the file list. All changes you make to the file will be made locally. As soon as you close the file, it will be sent back to the network and automatically checked in. ![File list showing Modified: 6 days ago (Wed 3/30/2016), Standard Hold Harmless Agreement 00001053.doc, Rental Agreement A0906571.docx, Modified: Last week (3/29/2016 - 3/27/2016), Welcome to Worldox GX4 Cloud A0925682.docx, Checked-out by Donna Saporito (DSAPORIT) on 4/5/2016 Check-In]	**Note: Checked-out Status in Audit > File dialog** If you select **Audit** > **File** for the document you have launched and automatically checked-out, the Event will show the document as being "Launched". The Event will only show "Checked-out" for a document that you manually checked out by selecting the **Check-out** button or menu option. The Audit Trail would become too large if it showed a "Checked-out" Event for every file you launch in GX4 Cloud.

Worldox GX4 Cloud Basics and Troubleshooting Guide
© Copyright 2016 World Software Corporation®

11. Troubleshooting the Worldox GX4 Installation
If you want to uninstall wdSaaS from your PC, use the uninstaller via the Control Panel. Remove the C:\Worldox\wdSaaS folder from your machine, and attempt the installation again**.**

12. Closing the Worldox GX4 Application

To properly close the Worldox GX4 Application, right-click the Worldox icon in your system tray and select **Close Worldox**.
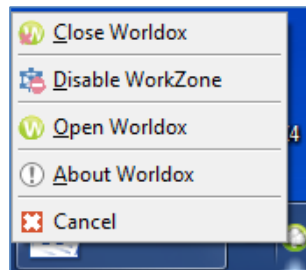

Troubleshooting GX4 Cloud

This section describes some issues you might encounter when working with Worldox GX4 Cloud and how to resolve them.

Issue 1: Document is closed, however it does not automatically check back in

At times, you may notice that your document does not automatically check back in to Worldox after you closed it. A reason for this may be that the application was not integrated, or the document was not checked back in due to an error condition. If this happens, you can simply check the file back in manually. Click the Check In link or button.

- If Worldox detects that the local copy and network copy of the file are different, you will see the following options:
    - Selecting **Copy up checked-out file over on-line original** will upload your changes to the data center and overwrite the original file (pre-check out) with your changes.
    - Selecting **Add as a new version** creates a new version on line, leaving earlier versions unchanged. The versions will be numbered correctly.
    - Selecting **Discard local mirror copy and revert to original** clears the checked out status, leaving the original file (pre-check out) unchanged. (**Note:** Checking files into Worldox is a fairly intuitive process, but even experienced users sometimes misjudge the effect of the **Discard local mirror copy and revert to original** choice on the File > Check-In dialog. That

Worldox GX4 Cloud Basics and Troubleshooting Guide
© Copyright 2016 World Software Corporation®

choice sometimes causes confusion. Some Worldox users understand mirroring better than others do. In essence, selecting this says, *"I want to disregard the changed version. Please overwrite it with the last version of the file that Worldox knows about."* The last version of a file would be the file as it was before you checked it out. This choice is probably not what most people want to do, though it is the right option when you want to disregard changes made off-line. Some users misunderstand and select that third option, thinking they are replacing the old, pre-check out versions with the newer ones. In fact, the opposite happens, causing an unwelcome surprise.)
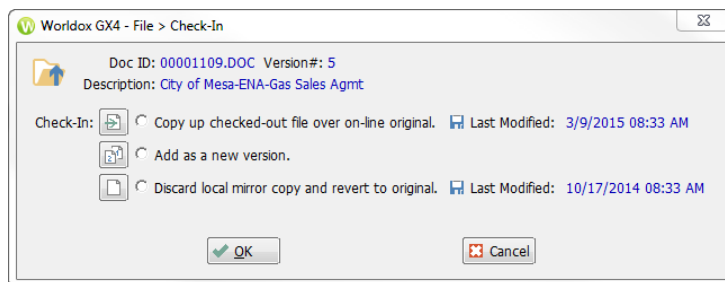
Make a selection and then Worldox then confirms your choice in a second File > Check-In dialog. Click **OK** to confirm.

- If Worldox detects no differences between the local copy and network copy of the file, the File > Check In dialog says, "**Remove your exclusive lock on the file. (No edits detected)."** Click **OK**.
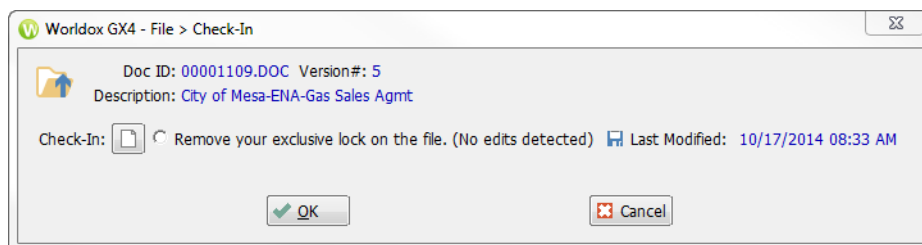
- In other cases, you may briefly see the Checked-Out status message next to the file. Click the **Refresh** button on the Worldox toolbar. A message will tell you that you do not need to check the document back in.
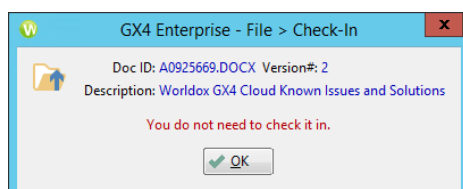
Issue 2: A Worldox dialog reports that the local document is newer than the online version when you open it

In some cases, you might have a file open that is not checked out and Worldox notices that the copy on your local drive is newer, a dialog reports that the local copy on your PC is newer than the version on the Enterprise server. Select the radio button next to the **Open the more recent local copy** option if you are certain it is the more up-to-date file.
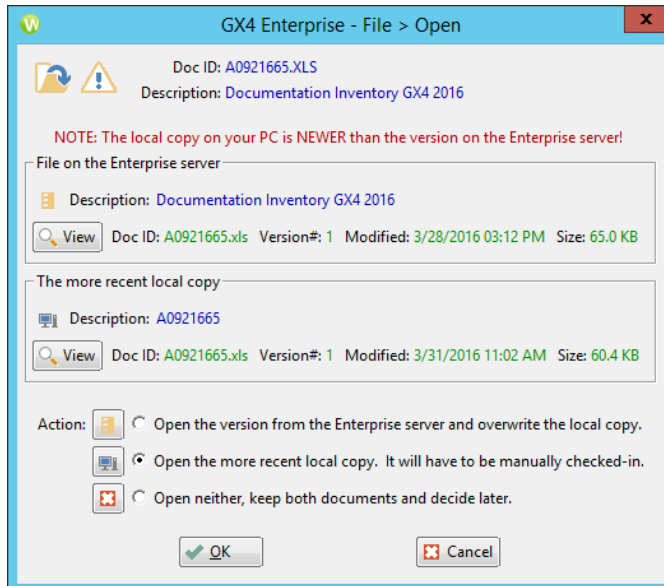
Issue 3: Microsoft Office crashes while working on a document.

When a Microsoft Office application crashes with an unsaved document open, Word/Excel will offer to re-open the last AutoSaved version of the document shown in the screenshot below.
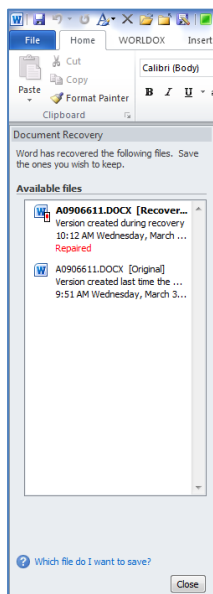

Choose the recovery document and ensure that you perform a File/Save as, which will allow you to save the recovery document as a new file, version of the original, or replace. This is the recommended course of action for this situation.

Worldox GX4 Cloud Basics and Troubleshooting Guide

If you choose a standard save, the file will be updated on the local machine, but will not copy back to the cloud. Choosing a standard save will produce Issue #2 earlier in this document.

Issue 4: Worldox Cloud experiences a disconnect while a document is open.

If you lose your Internet connection as you are working on a document that you opened with Worldox Cloud, an error message says that the connection has been lost and is attempting to reconnect. When the Credentials dialog appears, enter your user name and password to restore your connection to Worldox Cloud and save your file. Since your document is still open and checked out on your machine, it will check back in automatically upon close.
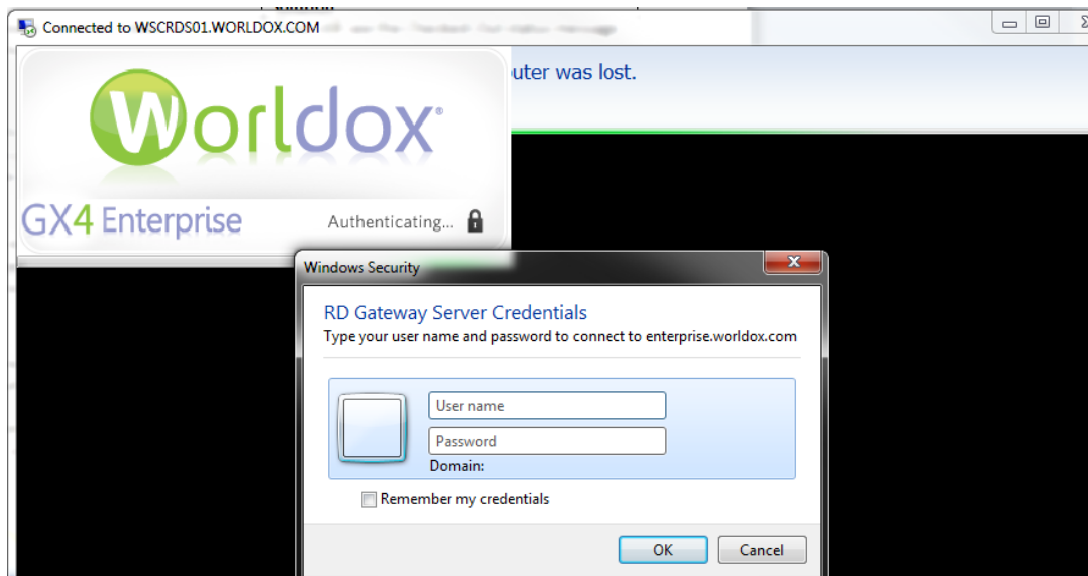
Issue 5: What to do if you think you have lost changes to a document.

This section describes how to recover documents or edits in Worldox Cloud:

- Actions that May Result in Lost Edits While Using Worldox Cloud
- Steps to Recover your "lost" Edits

Actions that May Result in Lost Edits While Using Worldox Cloud

If you do the following, you may lose changes to your document:

- You save changes to the document, but you shut down your computer or Worldox before Worldox is finished uploading and checking your file back in
- If you are working on the same set of documents between two different computers (for example, a PC in your office and a laptop at home) and you fail to ensure that the files upload and check in before switching computers. Always make sure that your file is checked back in so it is uploaded back to Worldox Cloud successfully before you shut down any computers you use.

## *What to do if you Think You Have Lost Changes to a Document*

If you think that you have lost a document's edits, you can check your local machine to find different drafts of your document.

As you work on a checked-out file, it resides on your local machine in a **Worldox\zms** directory. To navigate to the file's location, do the following:

1. From your PC's command prompt, type:

    %localappdata%\worldox\zms

    The Worldox\zms folder structure appears. This structure contains all the local copies of the files that you have previously checked out and downloaded. As you expand the top-level folders, you will notice that the Worldox\zms directory structure on your local machine mimics the profile group structure used in Worldox.
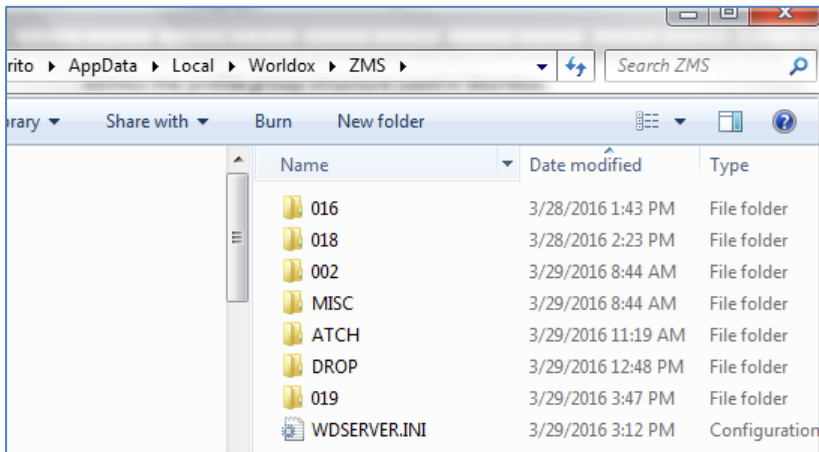

2. The numeric folders are the Worldox profile group ID numbers, which underneath contain the documents that were downloaded while using Worldox Cloud.

    This example will refer to the folder named **019**. This folder contains downloaded files that belong to the Sample Client Files profile group.

3. Double-click the profile group's numeric folder. The next folder in the directory structure will contain the base path folder for the profile group in question. In this example, it is **00247**.
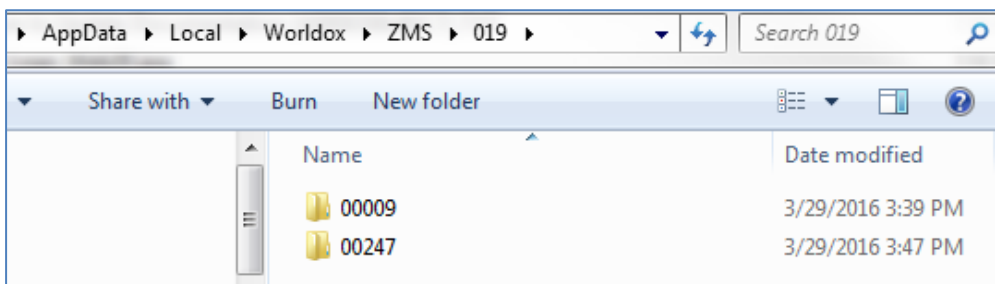
Note: In the following example, the Edit Profile dialog shows that a profile group is named Sample Client Files. The 00247 folder in the Worldox\zms directory correlates to the Client profile field for the Sample Client Files profile group.
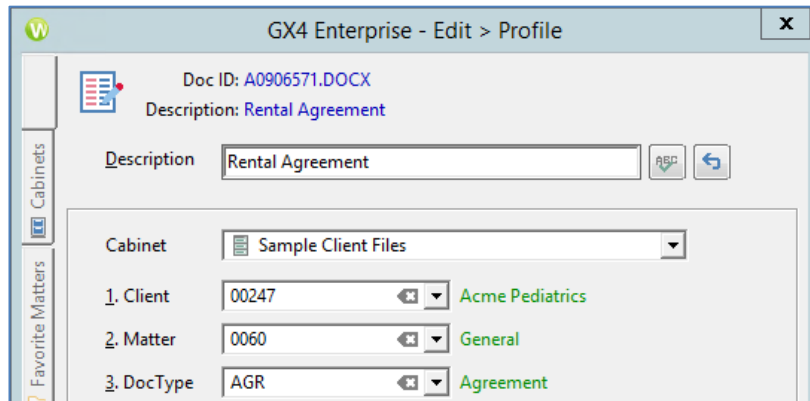

4. Double-click the next folder, for example, **0060**.
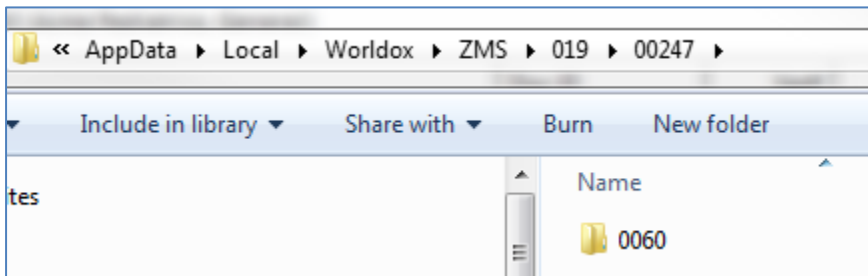
5. Double-click folders until you see a file and a folder named **~Ver**. This folder is marked hidden/system, so you must enable the viewing of these folder types in Windows before you can see this in Windows Explorer.
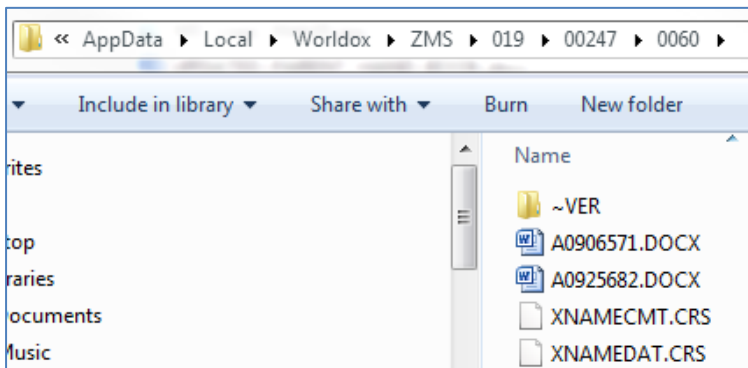
6. Double-click the **~Ver** folder to view all drafts of the documents that you saved locally while working with them. Every time you save changes to a file, a draft is saved in this directory regardless of whether it was properly uploaded to the cloud.
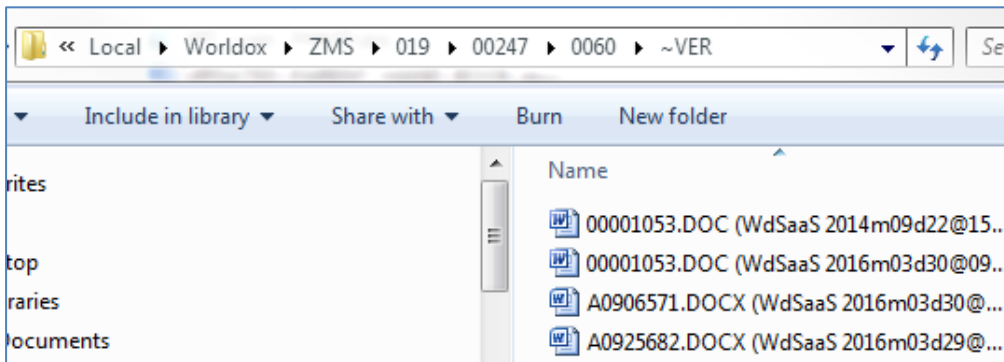
7. Launch Worldox if it is not already running.
8. Open the files to view edits and determine which draft of the file you want to recover.
9. While the file is open, choose **File** > **Save As** and save it with profile information as you normally would save a file in Worldox.
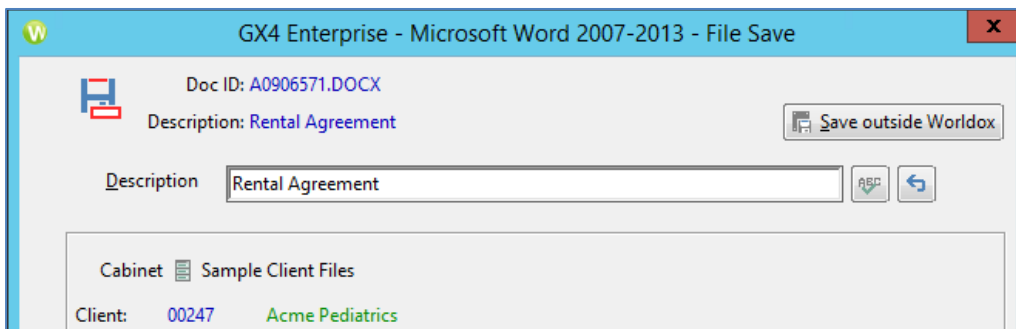
The file will be saved back into Worldox and all edits to that draft will be maintained.

Note: If you performed all of the steps in this procedure on each machine you used with Worldox Cloud and think you still have not recovered your edits, please contact Worldox Technical Support at (201) 444-3290 9:00 A.M. – 7:00 P.M. ET Monday through Friday.

Issue 6: Effect of machine going to sleep (or closing the lid of a laptop while Worldox is running).

If your machine goes into sleep mode or you accidentally close the laptop lid, the Terminal Server session is terminated after one minute. You will need to restart Worldox Cloud. However, any documents that were open and checked-out will maintain that state. You can resume working on them once you restart Worldox Cloud.

Worldox GX4 Cloud maintains a constant connection to our datacenter, and if this communication is interrupted, the client will timeout, disconnect, and require a re-login. When your computer is configured to go into sleep or hibernation mode after a period of inactivity, the network connection

is suspended, which causes the client to disconnect. You should also avoid simply closing the lid of your laptop without properly closing/logging out of the Worldox application.

See the following steps to disable sleep mode on your computer to prevent this from occurring:

Windows 7

1. Click the **Start** button and choose **Control Panel**.
2. Find **Power Options** and double-click to open.
3. Click the "Change when the computer sleeps" link on the left.
4. In the "Put the computer to sleep" column, choose **Never**.

Windows 8

1. From the "Metro" based start menu move your mouse to the very bottom of the screen and right-click.
2. Choose **All Apps**.
3. Choose **Control Panel**.
4. Find **Power Options** and double-click to open.
5. Click the "Change when the computer sleeps" link on the left.
6. In the "Put the computer to sleep" column, choose **Never.**

Windows 10

1. Click the **Start** button and type "Control Panel".
2. Choose "Control Panel" from the search results.
3. Find **Power Options** and double-click to open.
4. Click the "Change when the computer sleeps" link on the left.
5. In the "Put the computer to sleep" column, choose **Never**.

Issue 7: Document is being reported as corrupted on open and file size is only 1k in Worldox.

Whenever you create a new file, it is initially saved as a 1k stub file to your local drive. After you have saved it with information and closed it, the actual file should replace the 1k stub file. If you see an error that the document is corrupt or the file size is only 1k in Worldox Cloud, you can recover the file from the **Worldox\zms** directory as described in *What to do if you Think You Have Lost Changes to a Document*.

Worldox GX4 Cloud Basics and Troubleshooting Guide