



# Worldox Add-in for Microsoft® Office 365 User Guide

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**BETA**



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*To access the latest Worldox user guides, administration guides, release notes and technical documents, please click the Download link on the Worldox Knowledge Base at <https://knowledgebase.worldox.com/>.*

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# ***INTRODUCING THE WORLDOX ADD-IN FOR MICROSOFT OFFICE 365***

## ***Overview***

This user guide provides information for about features of the Worldox Add-in for Microsoft Office 365.

For system requirements and configuration information, please see the *Worldox Add-in for Microsoft Office 365 Administration Guide*.

**Note:** The sign-up period for participation in this pre-release candidate project has closed. This project has been scheduled on the roadmap to be updated and available in a future WDU package. We thank all participants for their feedback and look forward to implementing many of the ideas you suggested.

The Worldox Add-in for Microsoft Office 365 Word, Excel and PowerPoint provides access to several Worldox functions directly from those online apps, such as:

- **Copy to Worldox:** While you have a new file open in OneDrive you can use the **Copy to Worldox** option to copy it to Worldox Web to a specific Cabinet with other associated profile information. For details, see *Copying a File to Worldox from the Worldox Add-in*.
- **Briefcase:** Access the files you uploaded to the Worldox > Briefcase folder in OneDrive using the Worldox right-click Send to OneDrive option. The Briefcase folder enables you to access your files offline. For details, see *Sending Files to the Worldox Briefcase*.

### **Notes:**

- If you have not yet sent any files from the Worldox heavy client using the Send to OneDrive option, your Briefcase will be empty.
  - Do not try to upload files to the Worldox > Briefcase folder from the OneDrive online app. You can only send Worldox files to the Briefcase by using the Send To option in Worldox.)
  - If you check files out from the Worldox heavy client using the Send to OneDrive option, you must check them back in using the Worldox heavy client. See *Checking Files Out from Worldox to OneDrive and the Add-in's Briefcase*.
1. If you check files out from the Worldox Web via the Add-in to OneDrive, you must check them back in using Worldox Web. See *Checking Files Out from Worldox Web to OneDrive*.
- **Worldox Web:** Find, view and email documents or messages in Worldox Web 2.0, an Internet application server that works with the Worldox GX4 DMS (Document Management System). You can access files and Worldox functions from handheld devices, phones and PC browser. For details, see the Worldox Web 2.0 User Guide available on the Worldox Knowledge Base. For details see *Launching Worldox Web via the Worldox Add-in*.
  - **Sign Out:** If you want to access data on a different server, click the Sign Out menu option and enter the other Server URL, Server Name, User Name and User Password and click **Update**. For details, see *Logging in to a Different Server*.

## ***Worldox Deployment Options***

The following versions of Worldox have feature-rich interfaces that allow users to navigate, audit, bookmark, tag, preview, share, secure, categorize and search documents:

- **Worldox GX4 Professional** is the client server and standard desktop version of Worldox.
- **Worldox GX4 Enterprise** is a remote-access version of Worldox designed for multiple-office firms wishing to centralize document storage and management on site.
- **Worldox GX4 Cloud** has most of the powerful features of the heavy Worldox client, but generates even more expediency and flexibility through the utilization of Software-as-a-Service (SaaS) technology and cloud computing. With GX4 Cloud, professionals can use Worldox efficiently from virtually any location. Worldox GX4 Cloud is easily accessible from any computer, laptop or mobile device.

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**Note:** If you have questions on Worldox versions – or on the new, remote-access features of GX4 Enterprise and GX4 Cloud, please call Technical Support, Sales, or contact your Worldox reseller.

*Worldox Sales: (800) 962-6360  
sales@worldox.com*

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## ***Documentation Resources***

You can find the latest Worldox documentation in the Worldox Knowledge Base

<https://knowledgebase.worldox.com/>

A username and password are required for Knowledge Base access. If you don't have one, you can register to request access from the login screen.

## ***Worldox Technical Support***

### Contact Worldox Technical Support

World Software Technical Support is available to Worldox Maintenance Agreement customers free of charge between 9:00 am and 7:00 pm Eastern time, Monday through Friday, except on common American business holidays.

Before calling Technical Support, please do the following:

- Call from the computer that is experiencing issues if you are calling about a specific machine or user.
- If the problem involves an error message, try to leave the message on the screen. If that is not possible, then please write down the exact error message. Or, capture that message's image on the screen and send it to us. (Just press the **Prt Scr** key on your keyboard and paste the image into a Word document.)

To contact Worldox Technical Support:

- Call: **1-201-444-3290**
- Email: [support@worldox.com](mailto:support@worldox.com)

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**Note:** Providing remote access to World Software Technical support is often a necessary part of the troubleshooting process. Remote access sessions give World Software support technicians the information needed for expedient and effective problem resolution.

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### Request Technical Support Online

You can now request technical help online without the need to call Worldox tech support. You no longer must wait for the next available technician and you can also track pending service requests.

Use the new online service tool named **Worldox Customer Portal**. It is available to all current Worldox maintenance customers. To access the Worldox Customer Portal, just send an email to: [support@worldox.com](mailto:support@worldox.com). Please include the following information in your message:

- First/last name
- Company name
- *UNIQUE/PERSONAL* email address. For example, this email address is neither personal nor unique:

*administrator@companyname.com*

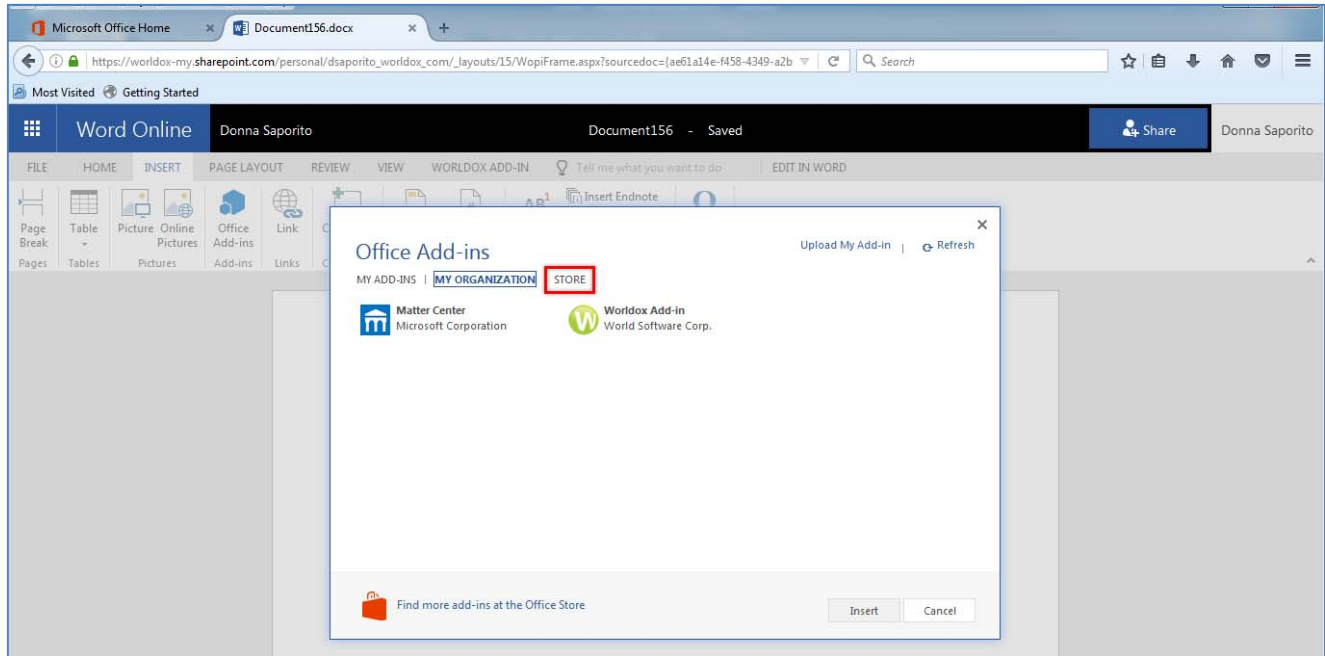
While this one is both:

*bfranklin@companyname.com*

The latter approach is better, since you will be creating a personal profile when you log in for the first time.

World Software will then send you a confirmation email with your username and password, plus a link to the portal.

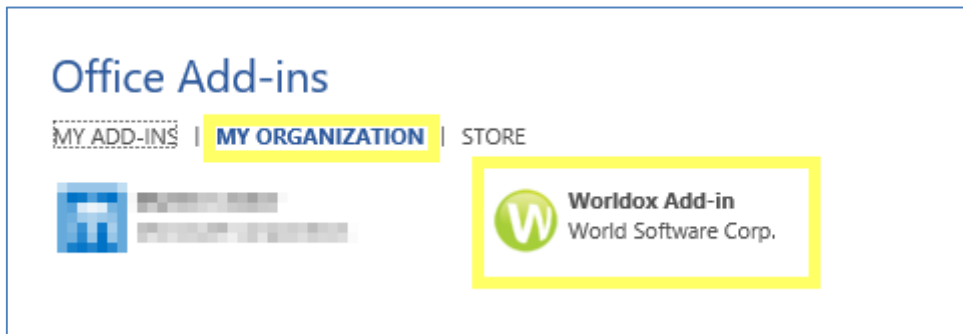
## INSERTING THE WORLDOX ADD-IN



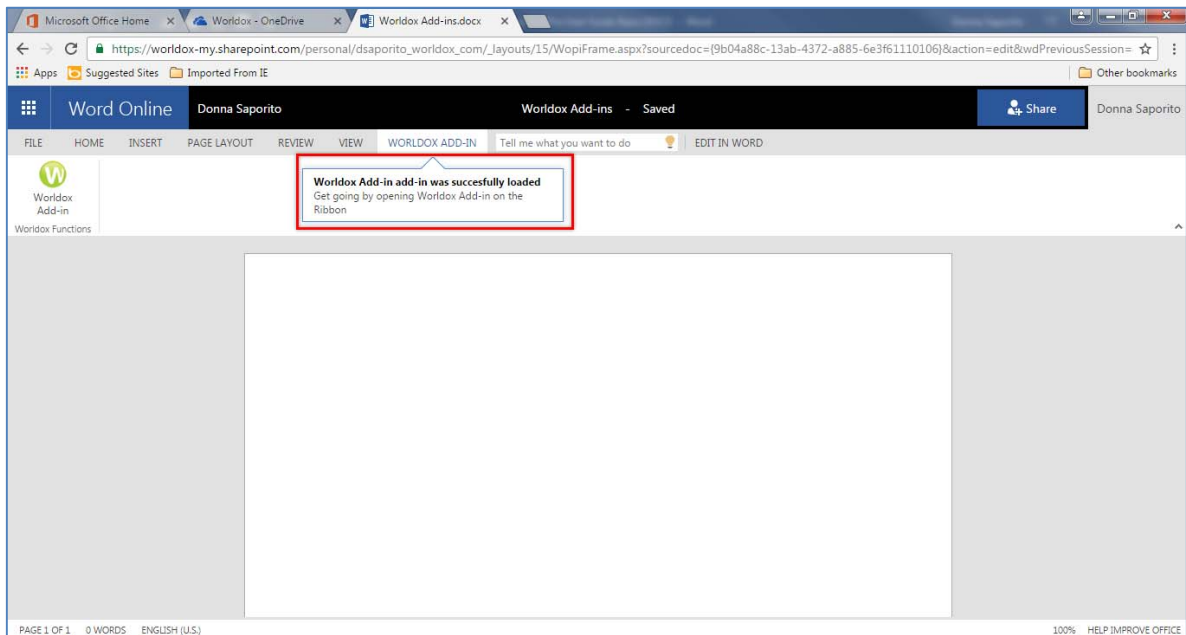
1. Log in to Microsoft Office 365 and open the Word, Excel or PowerPoint Online app.




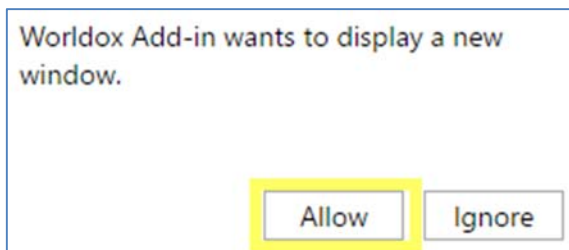
2. From the **Insert** menu, select **Office Add-ins**.
3. If your Worldox Admin has installed the Add-in through your tenant SharePoint catalog, choose **My Organization** and then select **Worldox Add-in**. Then select **Insert**.



- A message appears that confirms the add-in was successfully added. **Worldox Add-in** appears as a menu option and a button is added to the ribbon bar.

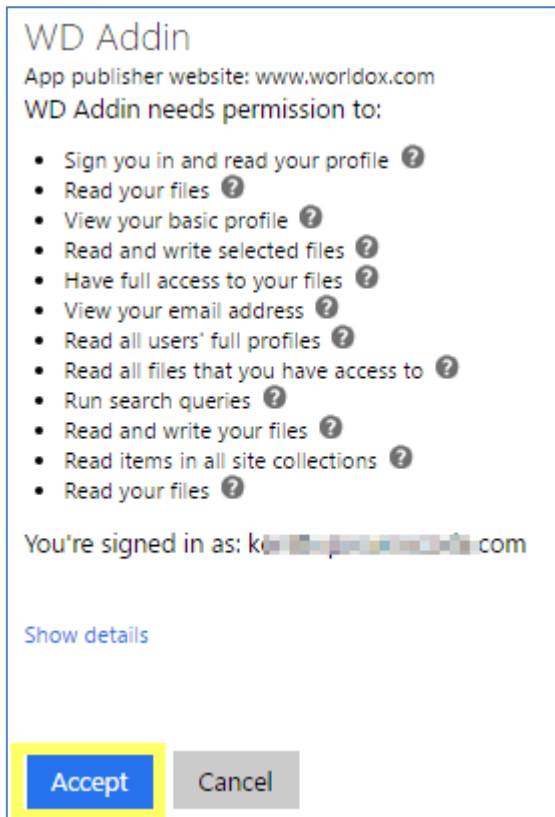


- Click the **Worldox Add-in**  button. A dialog informs you that the Worldox Add-in wants to display a new window. Click **Allow** to grant authorization.



- After you view the Add-in's permissions list, select **Accept**.



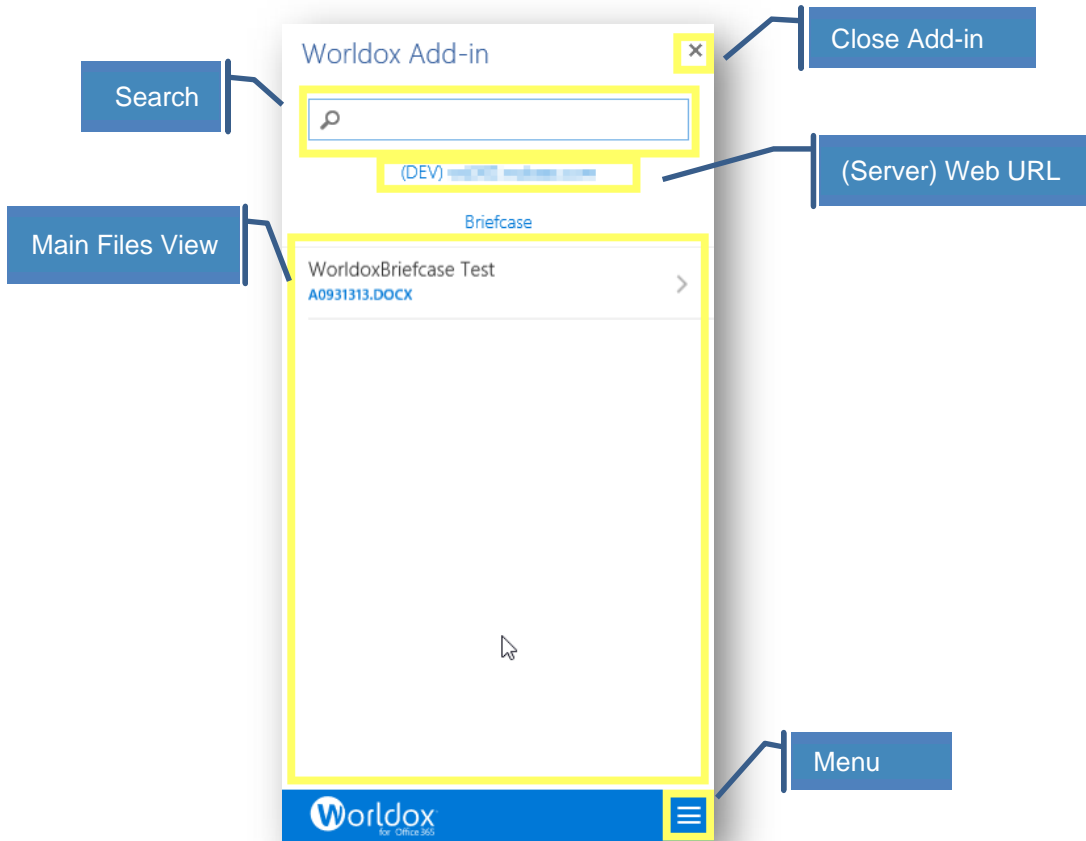


7. The first time you log in to the Worldox Add-in, you need to enter server information. See *Adding a Server to the Worldox Add-in* for details.

Upon subsequent logins, you will see the Worldox Web view by default instead of the login credentials window. For details see *Launching Worldox Web via the Worldox Add-in*.

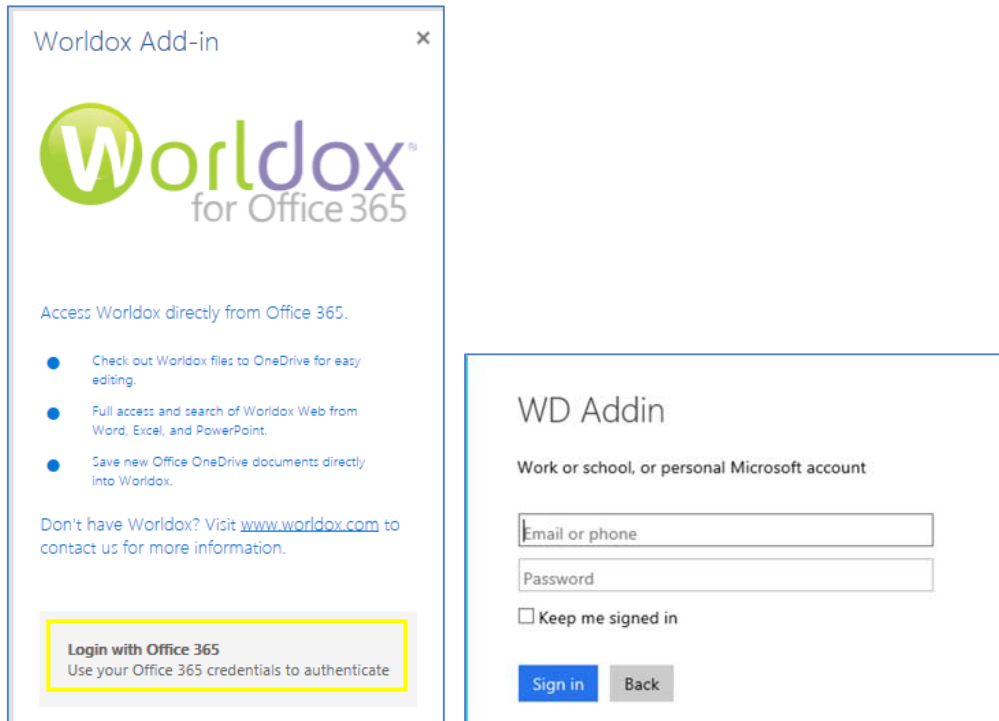
## WORLDDOX ADD-IN OVERVIEW

The following diagram shows some key features of the Worldox Add-in.



## LOGGING IN TO THE WORLDOX ADD-IN

You will be prompted to verify your Microsoft Office 365 credentials. Click **Login with Office 365** to do so.

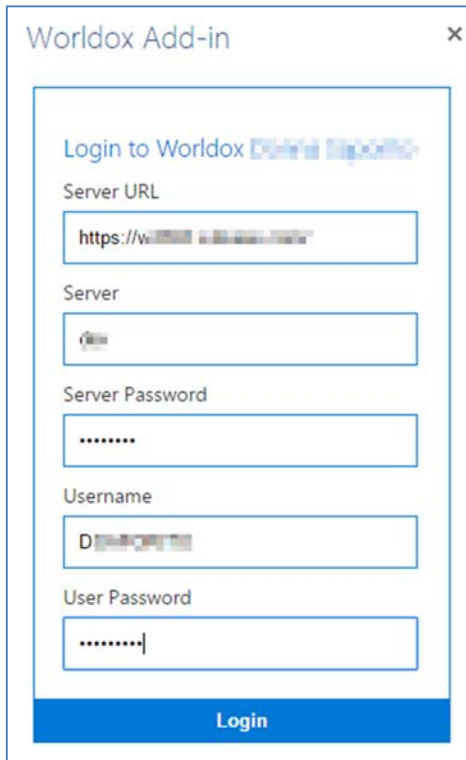


If you previously set Worldox Web credentials, you can click the **Login as** button that shows your user name next to it instead.



## ***ADDING A SERVER TO THE WORLDOX ADD-IN***


The first time you use the Worldox Add-in, you will need to enter server information.

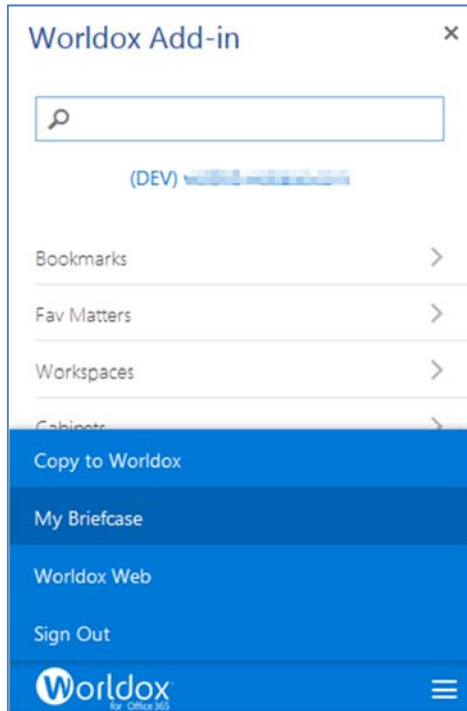


The screenshot shows a dialog box titled "Worldox Add-in" with a close button (X) in the top right corner. Inside the dialog, there is a section titled "Login to Worldox" with a link for "Online Support". Below this, there are five input fields: "Server URL" containing "https://worldox.worldsoftware.com", "Server" containing "10", "Server Password" containing "\*\*\*\*\*", "Username" containing "D", and "User Password" containing "\*\*\*\*\*". At the bottom of the dialog is a blue button labeled "Login".

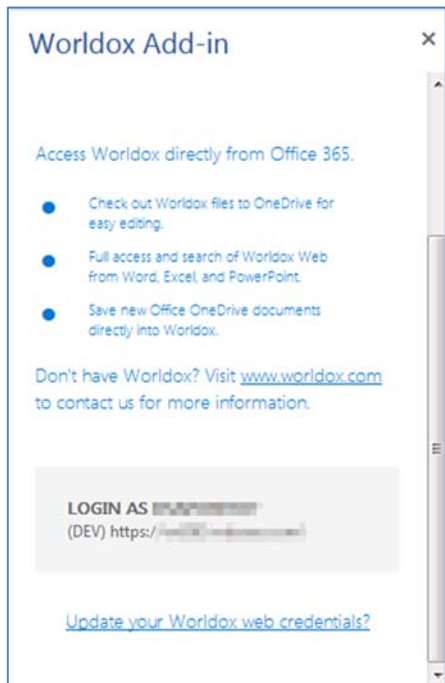
1. Fill in the following fields:
  - Worldox Web URL
  - Server Name
  - Server Password
  - User Name. The user name is encrypted and stored in a database maintained by World Software Corporation.
  - User Password
2. Click **Login**. You will see the Worldox Web view.

## LOGGING IN TO A DIFFERENT SERVER

If you want to access data on a different server, click the menu  icon and select **Sign Out**.



At the bottom of the Worldox Add-in panel, select **Update your Worldox Web credentials?**



In the next window, enter the different **Server URL**, **Server Name**, **User Name** and **User Password** and click **Update**.

Worldox Add-in

Update your Worldox web credentials to existing or new server.

Server Uri

This should be your server url.

Server name

This should be your server name.

Username

This should be your username.

User password

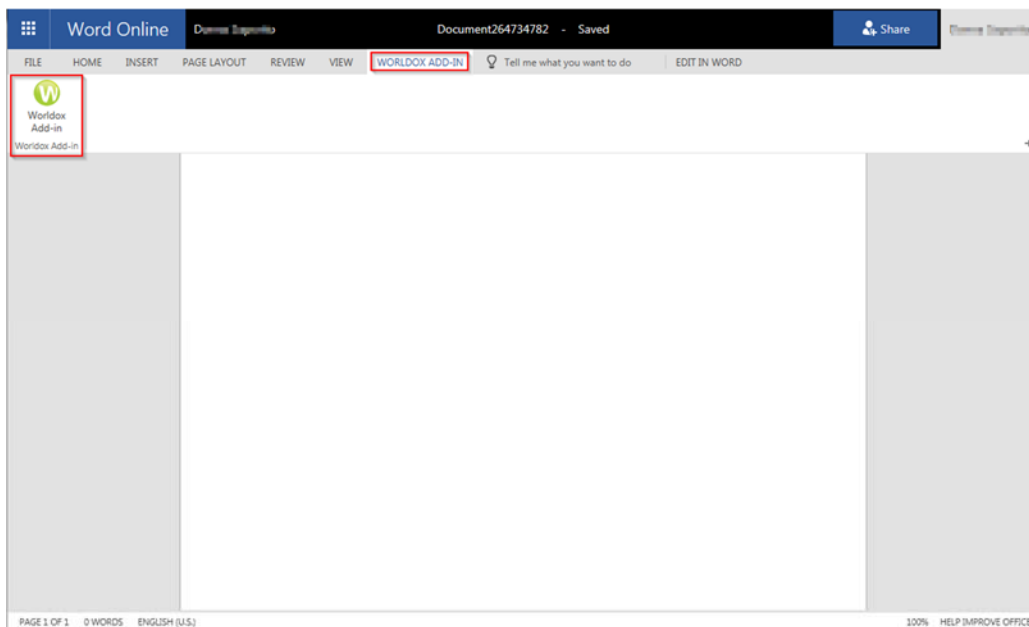
This should be your user password.


Update Cancel

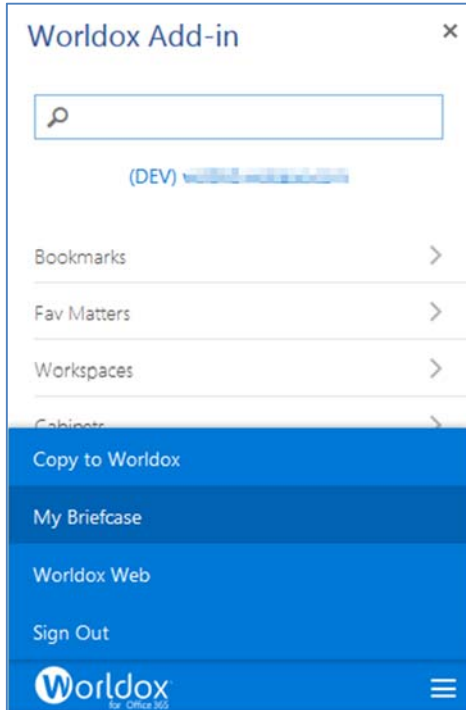
You can then log in as described in *Logging in to the Worldox Add-in* and the Worldox Web view will appear.

## ***ACCESSING WORLDOX ADD-IN FUNCTIONS***

1. After you insert the Worldox Add-in for the Office 365 online app, click the **Worldox Add-in** menu option and then the **Worldox Add-in** button.



2. The Worldox Add-in panel appears on the right side of the screen. If it is the first time you are accessing the Add-in, you will need to add a server. See *Adding a Server to the Worldox Add-in* for details. Otherwise, the Worldox Web view appears. Click the menu  icon to view a list of functions.



Functions include:

- **Copy to Worldox:** While you have a new file open in OneDrive you can use the **Copy to Worldox** option to copy it to Worldox Web to a specific Cabinet with other associated profile information. For details, see *Copying a File to Worldox from the Worldox Add-in*.
- **My Briefcase:** Access the files you uploaded to the Worldox > Briefcase folder in OneDrive using the Worldox right-click Send to OneDrive option. The Briefcase folder enables you to access your files offline. For details, see *Sending Files to the Worldox Briefcase*.

**Notes:**

- If you have not yet sent any files from the Worldox heavy client using the Send to OneDrive option, your Briefcase will be empty.
- Do not try to upload files to the Worldox > Briefcase folder from the OneDrive online app. You can only send Worldox files to the Briefcase by using the Send To option in Worldox.)
- If you check files out from the Worldox heavy client using the Send to OneDrive option, you must check them back in using the Worldox heavy client. See *Checking Files Out from Worldox to OneDrive and the Add-in's Briefcase*.
- If you check files out from Worldox Web via the Add-in to OneDrive, you must check them back in using Worldox Web. See *Checking Files Out from Worldox Web to OneDrive*.

- **Worldox Web:** Find, view and email documents or messages in Worldox Web 2.0, an Internet application server that works with the Worldox GX4 DMS (Document Management System). You can access files and Worldox functions from handheld devices, phones and PC browser. For details, see the Worldox Web 2.0 User Guide available on the Worldox Knowledge Base. For details see *Launching Worldox Web via the Worldox Add-in*.
- **Sign Out:** If you want to access data on a different server, click the Sign Out menu option and enter the other Server URL, Server Name, User Name and User Password and click **Update**. For details, see *Logging in to a Different Server*.

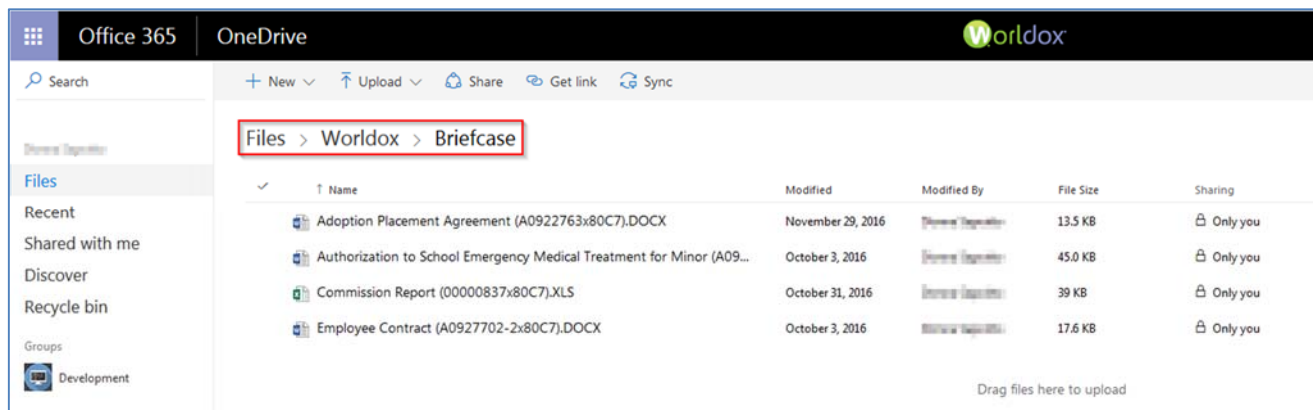
## ***SENDING FILES TO THE WORLDOX BRIEFCASE***

When you send files from Worldox using the **Send to OneDrive** option, those files will be checked out of Worldox and accessible from OneDrive Online's **Worldox > Briefcase** folder and from the Worldox Add-in's **Briefcase** option.

You can edit files in the Briefcase online because they are synced in OneDrive, but you must check the files back in using Worldox.

**Note:** You can also check files out to OneDrive from the Worldox Add-in, but you can only check the files back in using the Worldox Add-in.

The first time you access the Worldox Add-in for Office 365 Word, Excel or PowerPoint online apps, a **Worldox** folder and **Briefcase** sub-folder are automatically created. The following is an example in the OneDrive online app's Files list:



**Note:** Do not try to upload files to the Worldox > Briefcase folder from the OneDrive online app. You can only send Worldox files to the Briefcase by using the **Send To** option in Worldox.

## ***Viewing the OneDrive Sync Location on your Machine***

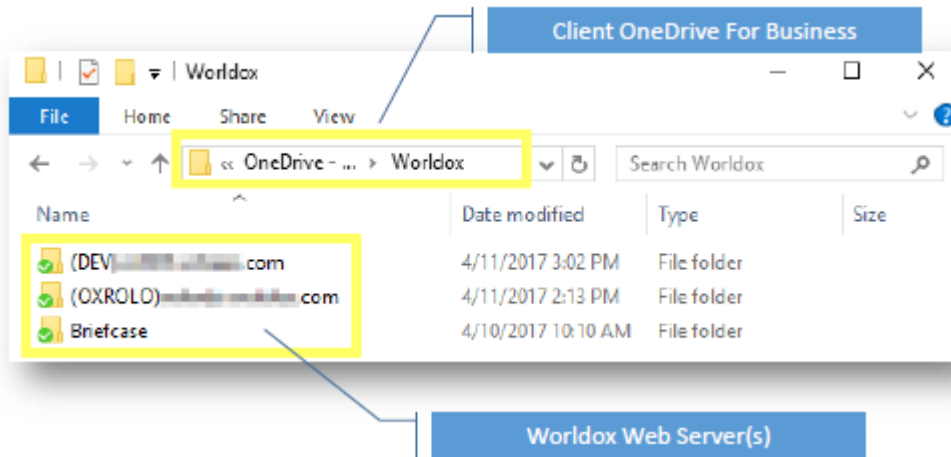
You can also view the OneDrive Sync locations in Windows Explorer or Mac Finder on your machine.

In Windows Explorer or Mac Finder, navigate to OneDrive for Business > Worldox to see:

- **Briefcase:** Files checked out to Briefcase
- **Worldox Web Server (URL)**

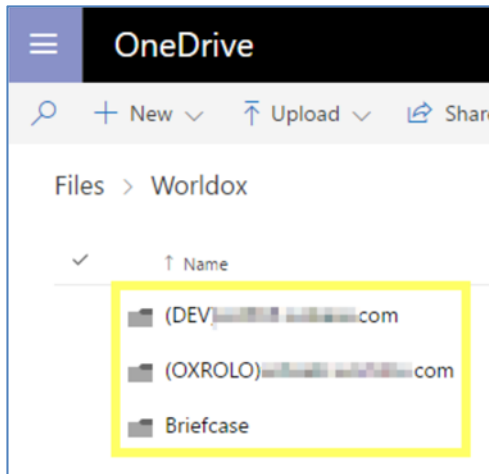


Folders are automatically created in the client's OneDrive for Business sync location. Examples are shown below:



### Viewing OneDrive Online Sync Locations

Local folders are automatically synced to OneDrive online. An example is shown below.



## Checking Files Out from Worldox to OneDrive and the Add-in's Briefcase

You can check out the following file types from Worldox using the *Send to OneDrive* option and edit them online in Office 365:

- .docx, .xlsx and .pptx

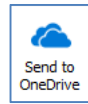
All other file types are viewable only.

Please note that if you check files out from the Worldox heavy client, not the Worldox Add-in, you can only check files back in using Worldox.

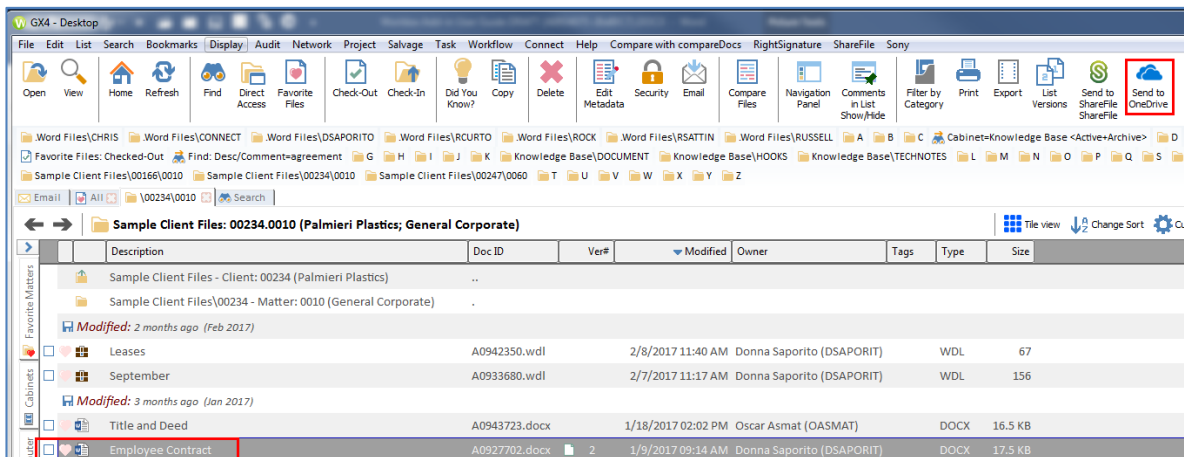
For details about checking files out to OneDrive from Worldox Web, see *Checking Files Out from Worldox Web to OneDrive*.

To check files out from Worldox, do the following:

1. Launch Worldox.



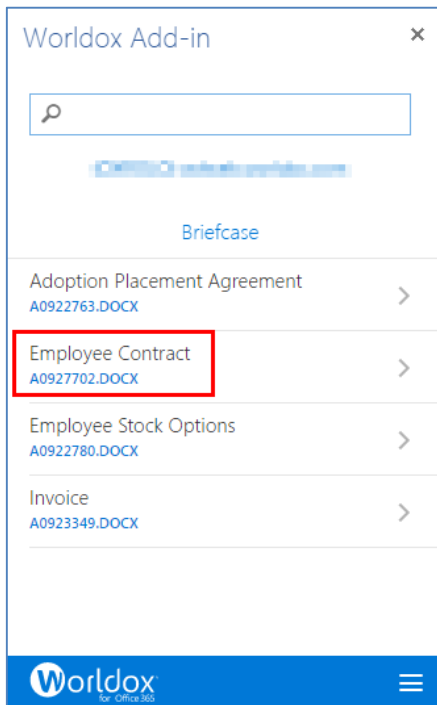
2. Highlight a file and select the **Send to OneDrive** button on the Worldox toolbar.



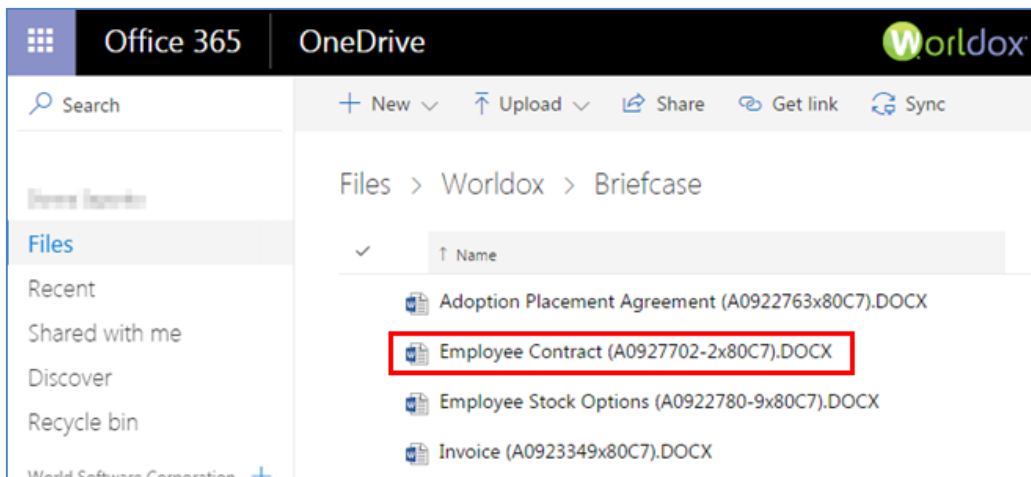
The Checked-out status appears under the file's description in Worldox.




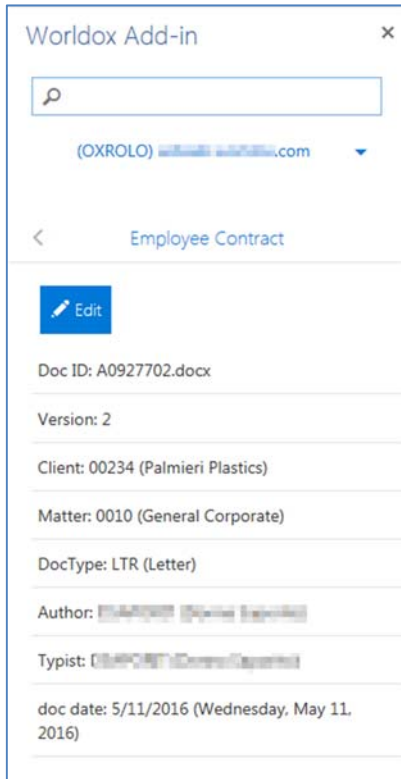
It also appears in the Worldox Add-in's My Briefcase.



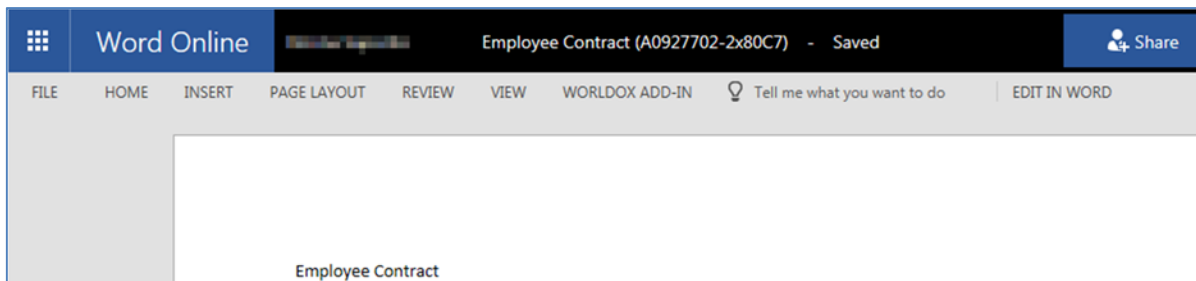
The file name also appears in OneDrive Online's file list.



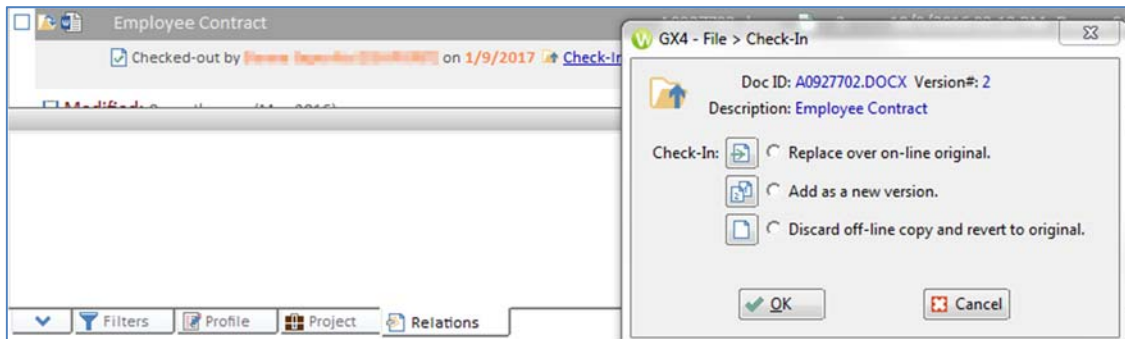
- In the Worldox Add-in, click the  arrow to the right of a file in the Briefcase. You can view profile information such as the Doc ID, version number, folder location (Client/Matter), DocType, Author, Typist, etc.



- Click the **Edit** button to open the file in the online app using Office 365's **Edit in Browser** option. Any changes you make to the file will be saved automatically.



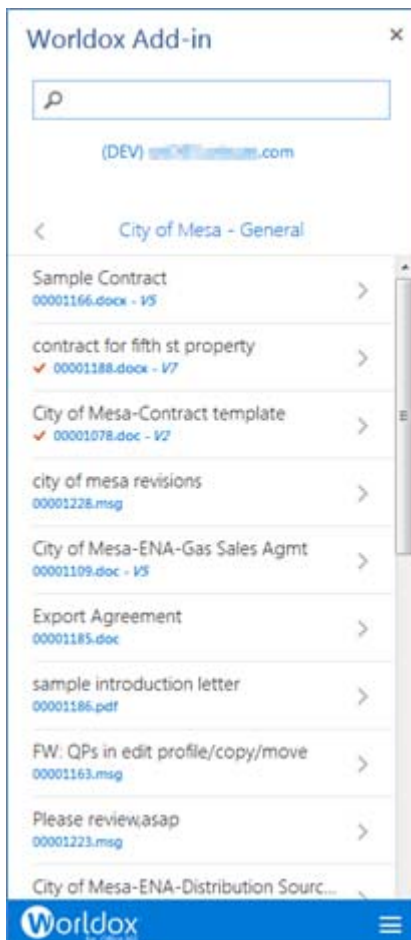
- After you have finished making edits to the file online, return to Worldox to check the file back in. Select **Check-in**. The Check-in dialog appears. Choose one of the following options:




- **Replace over on-line original** to save edits you made to the file when using the online app.
- **Add as a new version** creates a new version on line, leaving earlier versions unchanged. The versions will be numbered correctly.
- **Discard off-line copy and revert to original** clears the checked-out status, leaving the original file (pre-check out) unchanged.

### Opening Files in OneDrive

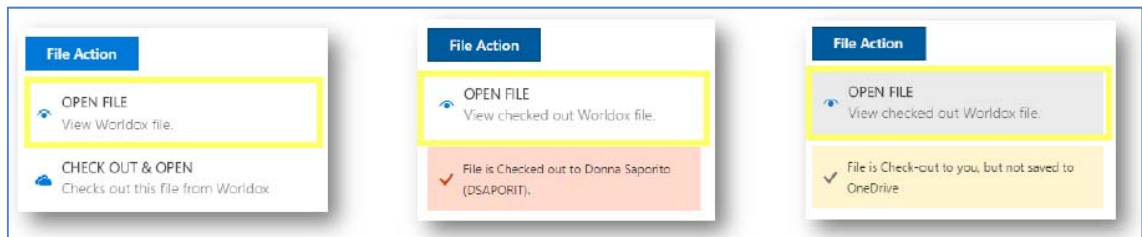
1. In the Worldox Add-in's Worldox Web view, open a file in Bookmarks, Fav Matters, Workspaces, Cabinets, or Favorite Files.



2. In the Worldox Add-in, click the  arrow to the right of a file in the Briefcase. You can view profile information such as the Doc ID, version number, folder location (Client/Matter), DocType, Author, Typist, etc.

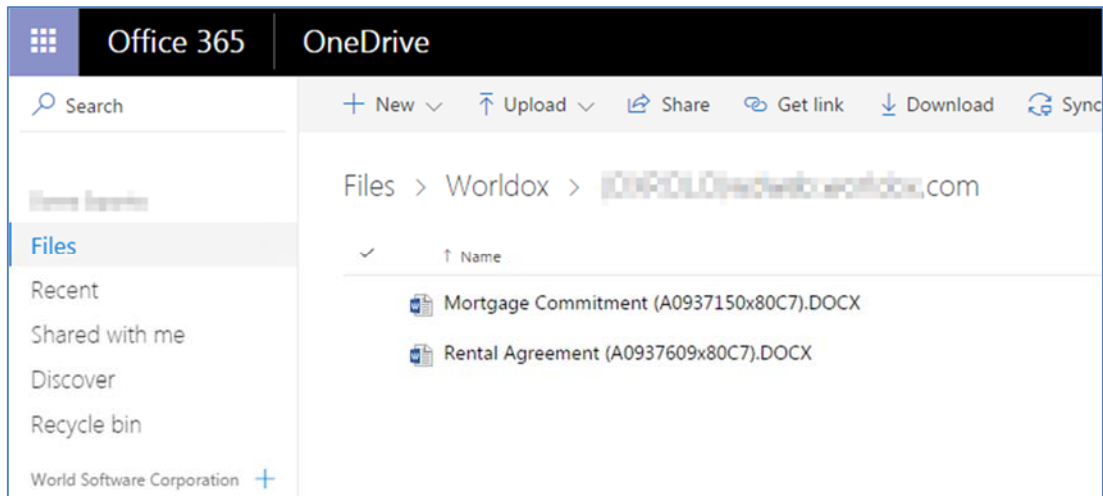


3. Click the **File Action** button. Select **Open File** to open the file in OneDrive. The file opens in a new browser window. This option is available for all files:
- Checked out to others
  - Checked out but not in OneDrive
  - Not Checked out



4. If you select **Open File in OneDrive**, the File is copied to the User's OneDrive sync folder online, for example:

**User > OneDrive for Business > Worldox > "Server"**



### ***Checking Files Out from Worldox Web to OneDrive***

You can check out the following file types from Worldox Web to OneDrive and edit them online in Office 365.

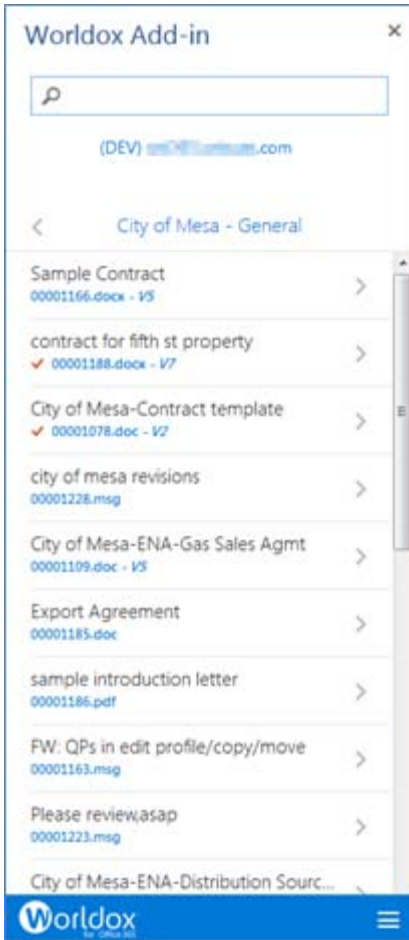
- .docx, .xlsx and .pptx


All other file types are viewable only. Please note that if you check files out using the Worldox Add-in, and not the Worldox heavy client, you can only check them back in using the Worldox Add-in.

For details about checking files out to OneDrive using the Worldox heavy client, see *Checking Files Out from Worldox to OneDrive and the Add-in's Briefcase*.

To check files out from the Worldox Add-in, do the following:

1. In the Worldox Add-in's Worldox Web view, open a file in Bookmarks, Fav Matters, Workspaces, Cabinets, or Favorite Files.



2. In the Worldox Add-in, click the  arrow to the right of a file in the Briefcase. You can view profile information such as the Doc ID, version number, folder location (Client/Matter), DocType, Author, Typist, etc.

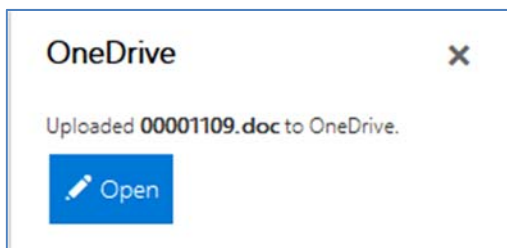




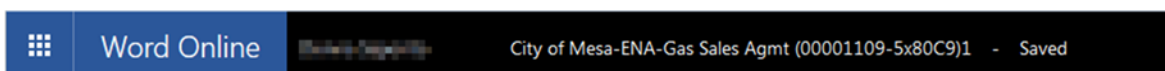
3. Click the **File Action** button. Select **Check out and Open** to check out the file from Worldox Web to OneDrive. The file is checked out from Worldox Web to OneDrive. The file opens in a new browser window. The file is copied to the user's OneDrive sync folder online.

**User > OneDrive for Business > Worldox > "Server"**

4. After you check the file out to OneDrive, a OneDrive pop-up confirms that the file has been uploaded. Click **Open**. The file is Checked out from the Add-in's Worldox Web to OneDrive. It opens in a new browser window. The file is copied to user's OneDrive sync folder online (for example, User > OneDrive for Business > Worldox > Server).

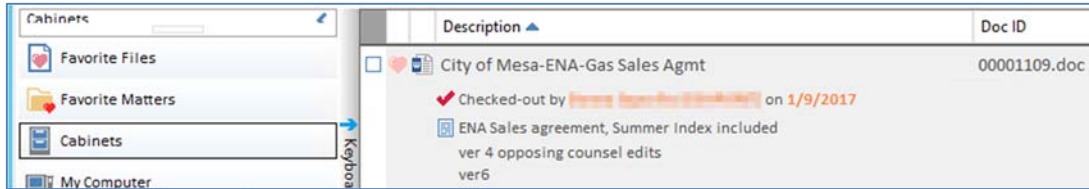


5. After the file opens in another browser window, you can edit it using Office 365's **Edit in Browser** option. Any changes you make to the file will be saved automatically.

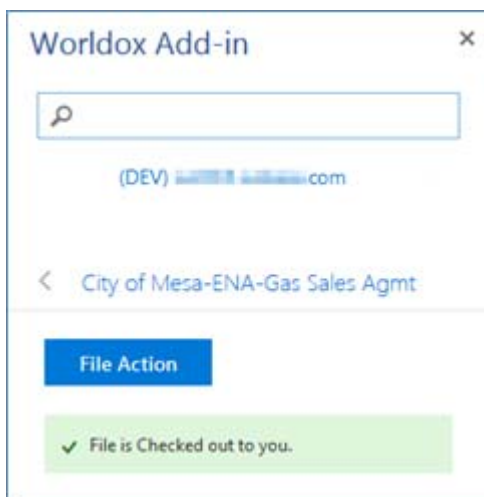


You can also see that the file has been checked out of the Worldox heavy client.

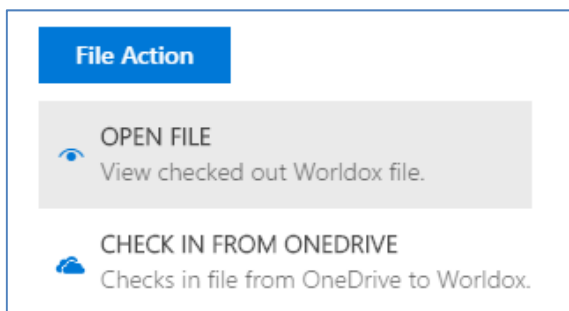
**Note:** When you check the file out using the Add-in, you *must* check it back in using the Add-in. You should only use the Worldox heavy client to check files back in if you initially checked them out from Worldox. For details, see *Checking Files Out from Worldox to OneDrive and the Add-in's Briefcase*.



6. After you finish making your changes, return to that file's profile view in the Add-in. The status shows it as being checked-out.

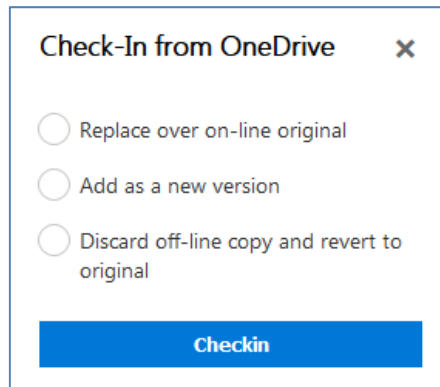


7. Select **File Action** and then **Check in from OneDrive**. The file is checked into Worldox Web. A copy remains in OneDrive and can be safely deleted or left to open later. Unless checked out, the newest file by date modified is opened between Worldox Web and OneDrive



8. Choose one of the following options:
  - **Replace over on-line original** to save edits you made to the file when using the online app.
  - **Add as a new version** creates a new version on line, leaving earlier versions unchanged. The versions will be numbered correctly.

- **Discard off-line copy and revert to original** clears the checked-out status, leaving the original file (pre-check out) unchanged.



The file is checked back into Worldox Web.


For more details about checking files out of Worldox (such as working with versioned files, etc.), see *Worldox GX4 Professional User Guide: Advanced Topics*.

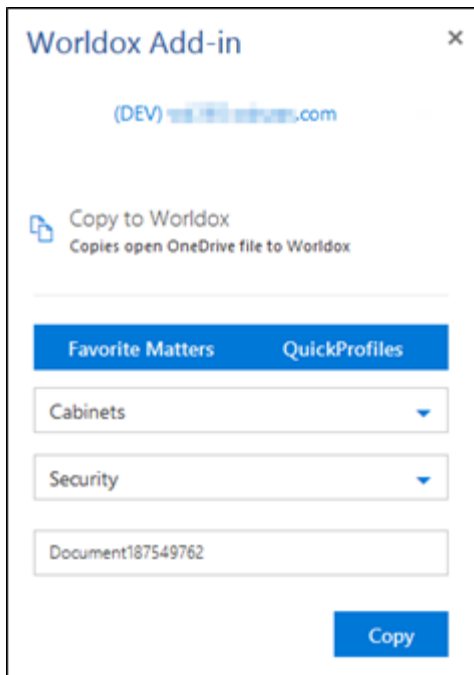
## ***COPYING A FILE TO WORLDOX FROM THE WORLDOX ADD-IN***

While you have a new file open in OneDrive you can use the **Copy to Worldox** option to copy it to Worldox Web to a specific Cabinet with other associated profile information. The file is saved with a Doc ID. You can assign it a file name and select the Cabinet, associated fields and security. The file Description will be the original OneDrive document title by default, but you can overwrite it in the File Description field before you finish uploading the copy.

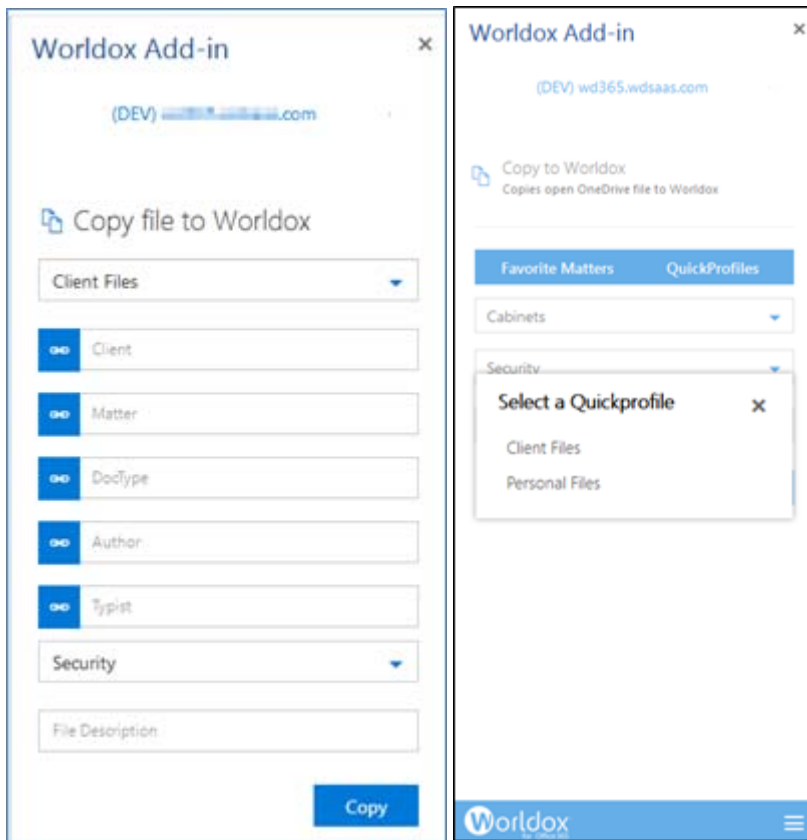
The copy is not synced with the original OneDrive file. You must close the open OneDrive file and navigate to the new file on Worldox Web that has been checked in.


**Note:** After a copy is made and it resides in the root directory in the OneDrive online app, you must manually delete it. At this point in time, Microsoft 365 does not allow us to delete open files.

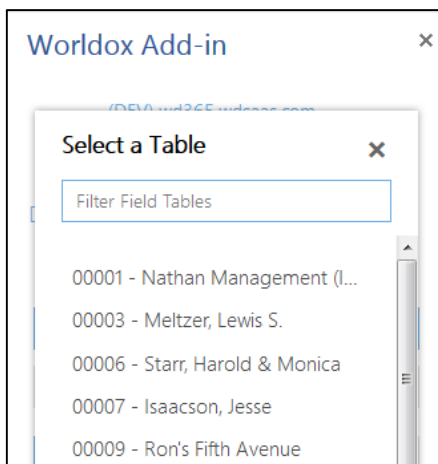
1. While you are working on a new file in an Office 365 app, click the menu  icon in the Add-in and select **Copy to Worldox**. The Copy to Worldox dialog appears.



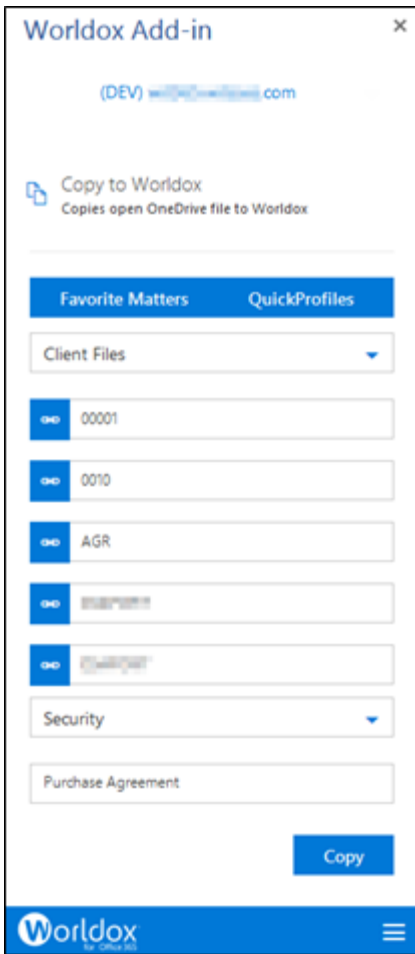
2. Select a **Cabinet**. Note that after you select a Cabinet, you must also fill in related profile fields (for example, Matter, DocType, Typist, etc.). Or you can select **Quick Profiles** or **Favorite Matters** to automatically populate profile information with pre-defined data. (For details about Quick Profiles, see the *Worldox GX4 Professional User Guide: Advanced Topics*.)



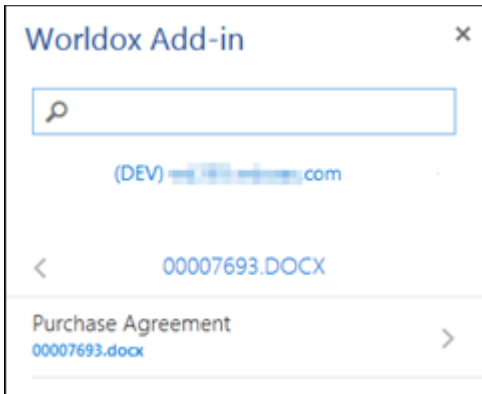
3. Select a **Security** type (for example, None, Checked-out, Hidden, Protected).
4. Enter a **File Description**.
5. You can click link  buttons to make selections from field tables.



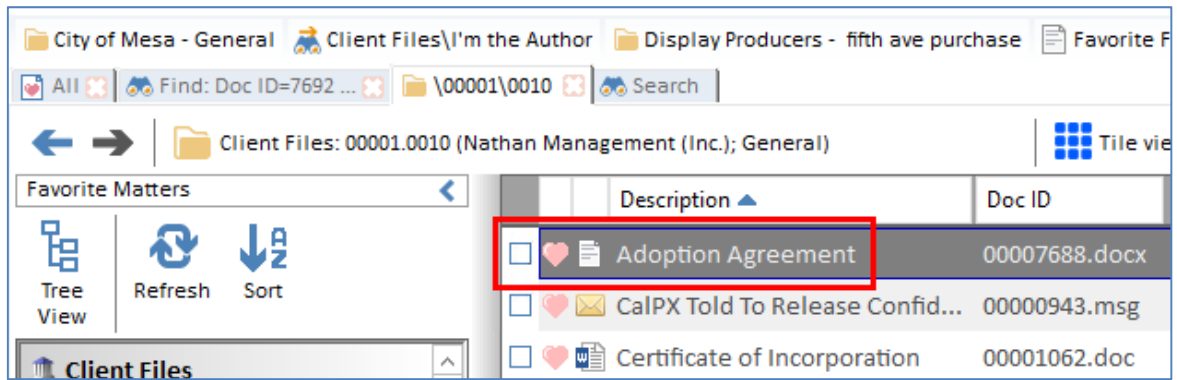
6. When you have finished editing the file and filled in profile, Security and File Description fields, select **Copy**.



After the file has been copied to Worldox Web, you can view it in the Worldox Add-in and click the arrow to view profile information and other options.



You can also check the Worldox heavy client to see the file.

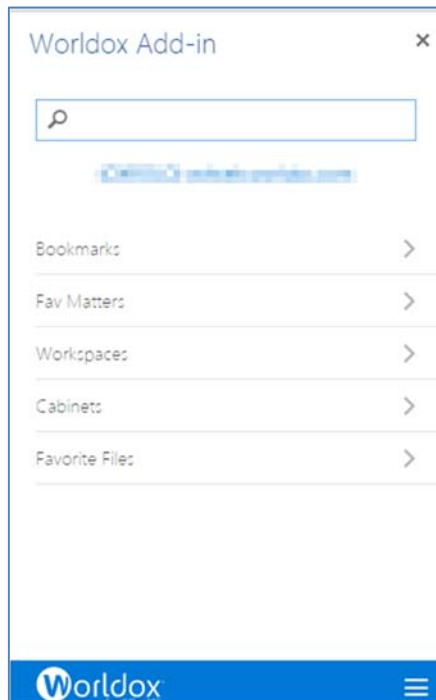


You can find the file in Worldox using any of the following search options:

- Direct Access
- Search by Doc ID or Description
- Access the file's Cabinet from the Navigation Panel

## ***LAUNCHING WORLDOX WEB VIA THE WORLDOX ADD-IN***

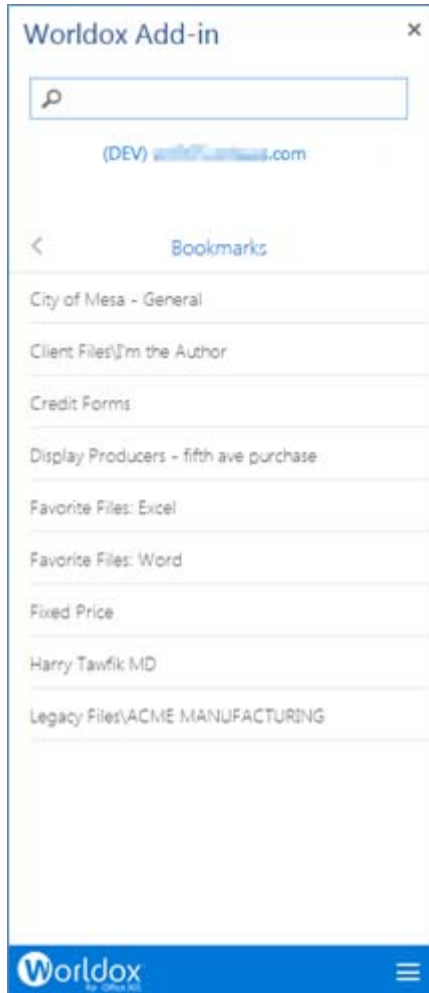
This section describes how to use the features of Worldox Web via the Worldox Add-in for Microsoft Office 365. Worldox Web 2.0 is an Internet application server that works in conjunction with the Worldox GX4 document management system. It makes corporate documents available to authorized users over the World Wide Web. Users have automatic, real-time accessibility to Bookmarks, Favorite Matters, Workspaces, Cabinets and Favorite Files directly from their Worldox Add-in.



For details about using Worldox Web on a PC Browser or on handheld devices, please see the *Worldox Web 2.0 User Guide* that is available on the Worldox Knowledge Base.

## **Bookmarks**

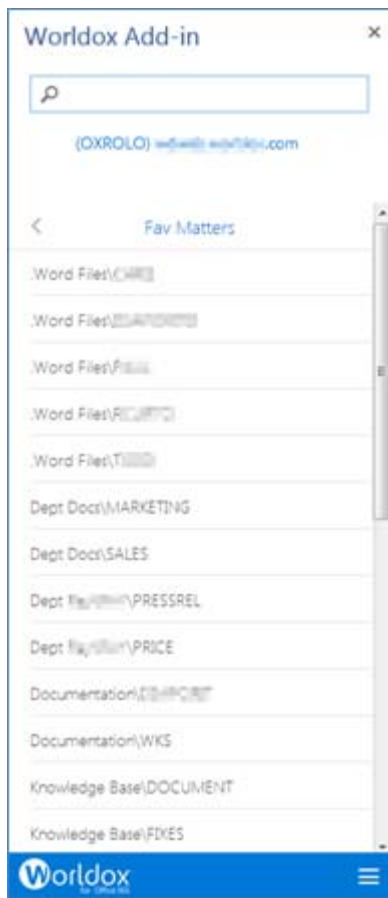
Bookmarks are shortcuts to frequently-used folders, Favorite File lists and previously-accessed searches. In Worldox, Bookmarks are found in a list under the Bookmarks menu, and in “pinned” folders on the bookmarks bar under the toolbar. You can access the same shortcuts using Worldox Web from the Add-in.



## **Fav 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 3<sup>rd</sup> party products that support Follow Me Favorites.





## ***Workspaces***

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.

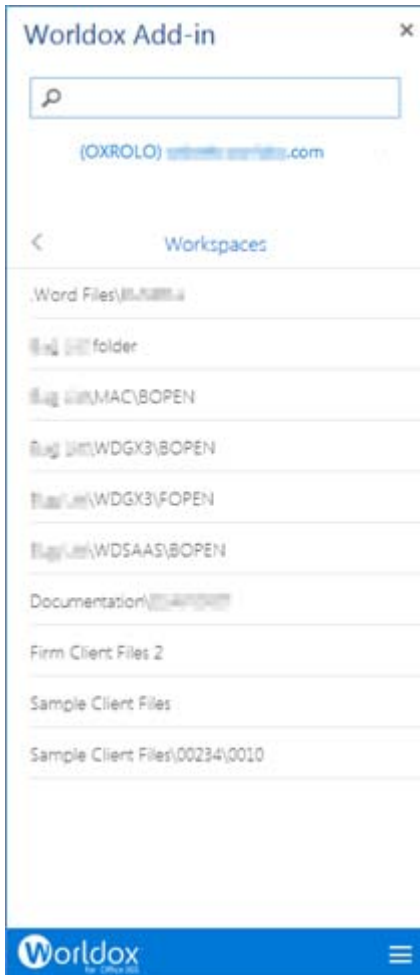
There are three important benefits:

- 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.

In Worldox you can subscribe to Workspaces 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. For details about Workspaces in Worldox, see the *Worldox GX4 Professional User Guide: Advanced Topics*.

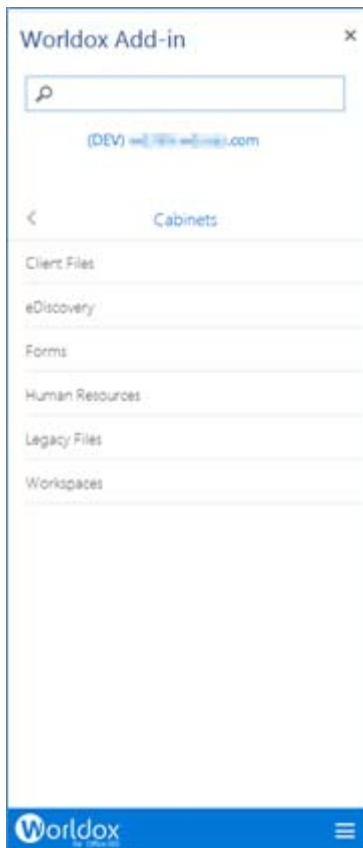
Click **Workspaces** in the Worldox Add-in. Then click a Workspace to view files contained within it.



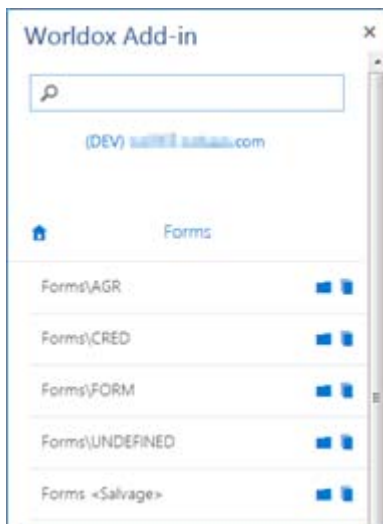
## Cabinets


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.

- Click **Cabinets** in the Worldox Add-in. Then click a Cabinet name (for example, **Forms**).




A folder list appears.




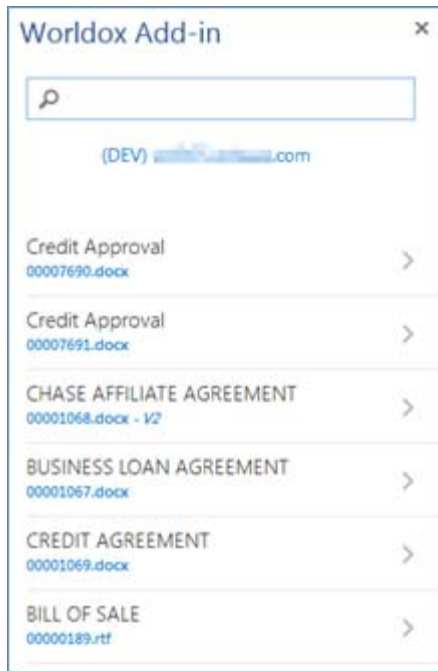
- Click the folder  icon next to a folder name (for example, Forms\CRED) to access any sub-folders.



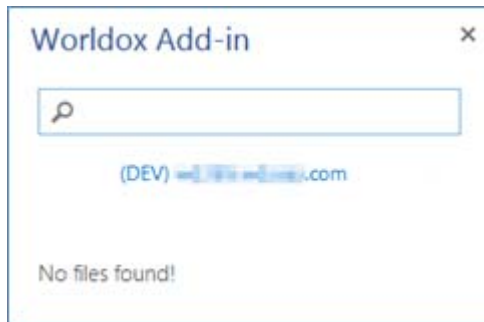
- Click one of the following:
  - The folder  icon if the main folder has any sub-folders to view. **Note:** If the main folder does not contain sub-folders, a “No folders found!” message appears.



- The file  icon to view a list of files in the folder.



**Note:** If the folder does not contain files, a “No files found!” message appears.



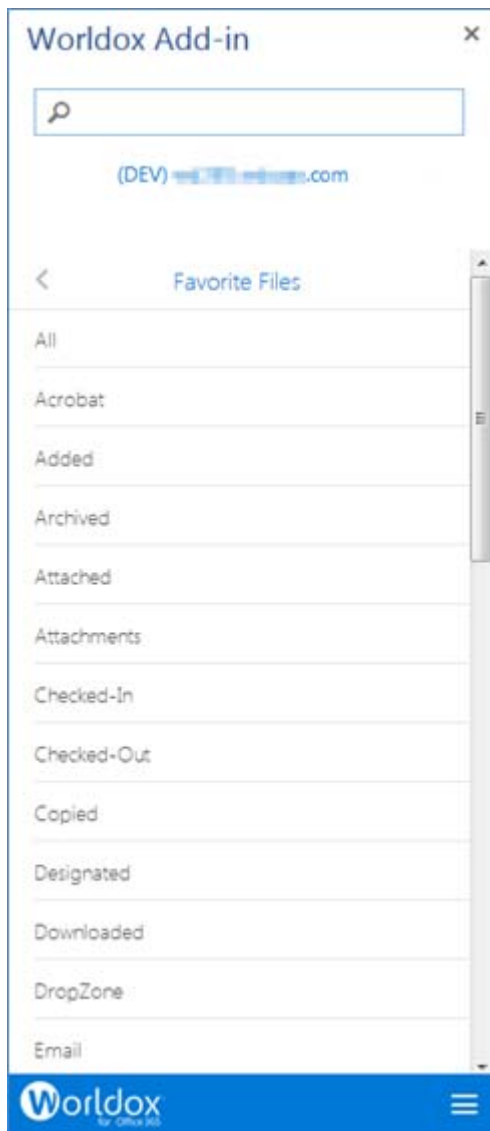
### ***Favorite Files***

*Favorite Files* in Worldox are files you have recently saved or otherwise used. Worldox “remembers” and lists up to 20 recently accessed files in each Favorites category. When you start using Worldox, you may have just a few favorite categories listed. As you work with more programs – and access more files –Favorites categories change to reflect this activity.

Favorite listings are based on recent activity. Any one Favorites category can only have up to 20 files listed, so the Favorites list changes over time. Also, certain files are removed from the Favorites list over time they get removed or if you do not access them again.

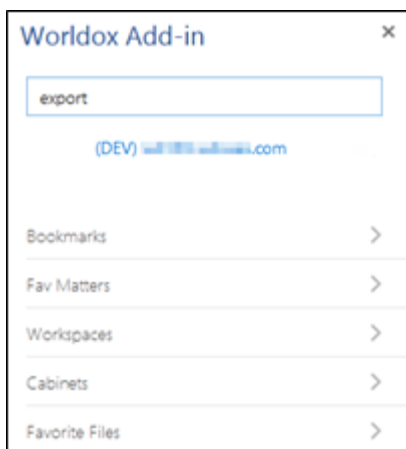
Worldox Web “remembers” and lists up to 20 recently accessed files in each Favorite Files category. Click a category name to see any files that have been assigned to that category.

For more details about Favorite Files (such as manually selecting them), see the *Worldox GX4 Professional User Guide: The Basics*.

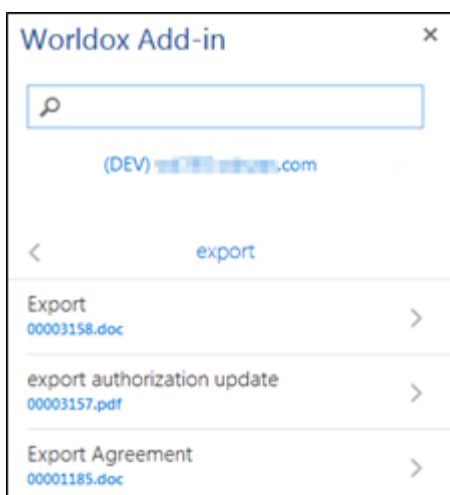




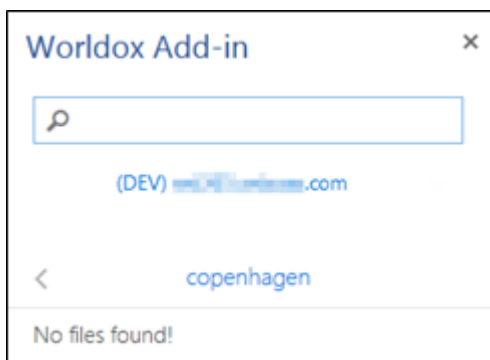
- In the following example, the word **(file description)** “export” has been entered into the search bar.



The following example shows search results for file descriptions that contain the word “export”.



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





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