



# Worldox GX4 Overview

World Software Corporation

[www.worldox.com](http://www.worldox.com)

# What's New in Worldox GX4



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

## 1. Ease of Use

## 2. Mobility

Our main goal is to make GX4 as effortless as possible.

Many new features significantly reduce your time to file and retrieve documents, including:

- Broad document tagging and searching
- Active Profiling - Follow Me Favorites technology knows which files you worked on recently and then presents these choices for quick filing



# User Interface Changes in the File List

Worldox GX4 offers a clean and simple user interface with a more modern theme.

The screenshot displays the Worldox GX4 Desktop interface. The window title is "Worldox GX4 - Desktop". The menu bar includes File, Edit, List, Search, Bookmarks, Display, Audit, Network, Project, Task, Workflow, Help, and ShareFile. The toolbar contains icons for Open, View, Refresh, Advance, Direct, Home, Recent, and Email. The address bar shows the path "Client Files\00060\0140". The main content area is divided into three columns, each representing a category of files:

- AGR (Agreement) 11 Files**
  - Confidentiality agreement (Modified: 12/18/2009 02:11 PM, Owner: \*Master User (000000), Sample document supplied by 3rd party for review)
  - ebay demo (v: 2, Modified: 9/24/2014 12:28 PM, Owner: Chris Dohnert (WDTSTUSR), change)
  - GE Contract exhibit (v: 2, Modified: 9/18/2014 06:42 PM, Owner: Chris Dohnert (WDTSTUSR))
  - ILTA SONY press release (Modified: 8/17/2014 04:58 AM, Owner: Chris Dohnert (WDTSTUSR))
- BRIEF (Brief) 3 Files**
  - Collaborative Research Agreement (final) (Modified: 7/4/2014 09:33 PM, Owner: Chris Dohnert (WDTSTUSR))
  - Sample Brief (v: 3, Modified: 7/4/2014 09:33 PM, Owner: Chris Dohnert (WDTSTUSR))
  - Sample Brief (Modified: 7/4/2014 09:41 PM, Owner: Chris Dohnert (WDTSTUSR))
- CONTRACT (Contracts) 3 Files**
  - BMS Supply Agreement (Modified: 12/18/2009 02:11 PM, Owner: User, Demo (ADEMO))
  - Contract Sample (Modified: 9/6/2014 12:15 AM, Owner: Chris Dohnert (WDTSTUSR))
  - Stock Options Plan Revised (Modified: 4/10/2011 09:35 PM, Owner: User, Demo (ADEMO), For review by legal team. Pending review)
- CRED (Credit Agreement) 1 File**
  - Installment Promissory Note (Secured) (Modified: 7/7/2011 08:54 PM, Owner: User, Demo (ADEMO))
- EMAIL (Email Message) 11 Files**
  - (No Subject) (Modified: 4/5/2001 07:20 PM, Owner: Ray Zwiefelhofer (PD))
  - 2001 natural gas forecast (Modified: 1/1/2001 04:38 AM, Owner: Ray Zwiefelhofer (PD))
  - Akzo Nobel, Inc. Confirmation Letter (Modified: 1/8/2001 10:01 AM, Owner: User, Demo (ADEMO))
  - Concur Expense Document for File (Modified: 7/12/2011 11:21 AM, Owner: User 5, Demo (ADEMOS))
- EMP (Employment) 2 Files**
  - Employee Contract (v: 2, Modified: 8/15/2014 10:07 PM, Owner: Chris Dohnert (WDTSTUSR), For Ray Zwiefelhofer, revision for extended vacation days)
  - Employee Contract (Modified: 8/15/2014 10:15 PM, Owner: Chris Dohnert (WDTSTUSR), For Ray Zwiefelhofer, revision for extended vacation days)
- IMAGE (Image File) 2 Files**
  - Building Photo for File
- LTR (Letter) 4 Files**
  - Collaborative Research Agreement
- NOTES (Meeting Notes) 1 File**
  - WSC meeting Notes

The interface includes a sidebar on the left with "Favorite Matters", "Bookmarks", "Workspaces", "Workflows", and "Cabines". The bottom of the window shows a status bar with "Comments", "Profile", "Relations", and "Tags".

# Preview Files Panel and In-line Viewing Technology

When a file is highlighted in the file list, click the **View** tab on the right side of the screen to preview the file's content. To close the viewer window, click the **Hide View** tab to collapse it.

The screenshot displays the Worldox GX4 Desktop interface. The main window is titled "Worldox GX4 - Desktop" and features a menu bar with options: File, Edit, List, Search, Bookmarks, Display, Audit, Network, Project, Task, Workflow, Help, and ShareFile. Below the menu bar is a toolbar with icons for Open, View, Refresh List, Advance Find, Direct Access, Home, Recent Files, and Email. The address bar shows the current location: "Client Files\00009\0020".

The left sidebar contains a file list with two sections: "AGR (Agreement)" and "EMAIL (Email Message)". The "AGR (Agreement)" section is expanded, showing three files. The first file, "Business Consultant Agreement", is highlighted. Its details are: Modified: 7/8/2011 08:41 PM, Owner: Us... The "EMAIL (Email Message)" section shows two files: "Mesa" (Modified: 7/26/2001 02:43 PM, Owner: C...) and "The Group to Aruba is a GO!" (Modified: 3/28/2001 07:08 PM, Owner: C...).

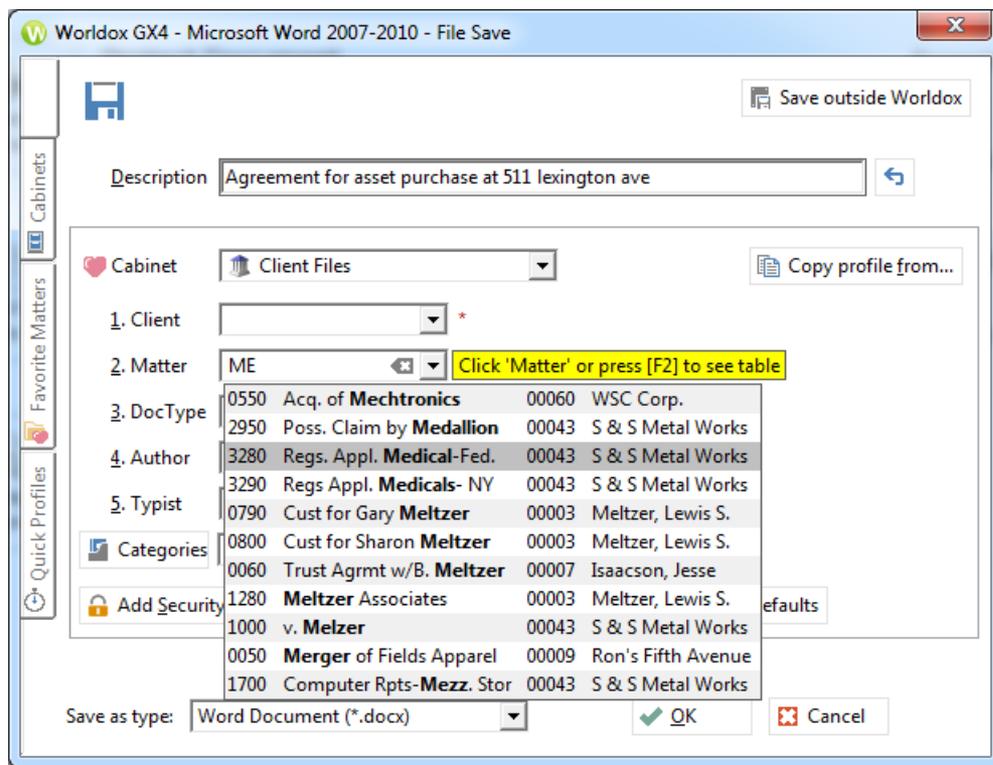
The main content area displays the preview of the selected file, "Business Consultant Agreement". The title is "Viewing: Business Consultant Agreement (Client Files\00009\0020\00000858.DOC)". The document content includes the title "BUSINESS CONSULTANT AGREEMENT" and several paragraphs of text, including a definition of "Consultant" and numbered sections for "1. Consultation Services" and "2. Terms of Agreement".

On the right side of the preview window, there is a vertical toolbar with two buttons: "Hide View" and "View: Business Consultant Agreement". The "View: Business Consultant Agreement" button is highlighted with a red box.

The bottom status bar shows "Client Files\00009\0020" and "File: 1 of 8".

# Field Table Lookup for Code and Description

When adding or changing profile metadata, start typing either the field's Description or Code to automatically locate it in the list and populate the field. Worldox does not delineate between code and description and it highlights any matching codes or descriptions in the field table list. You can type additional characters to refine your search. In the following example, the user began to type "ME" in the Matter field. Any codes and descriptions with those letters automatically appear in the list for quick and easy selection.



# Enhanced Search Capabilities

The new Search tab's search field allows you to find files based on File Contents, Doc ID or Description, or Doc ID or Description/Contents. The other allows you to search for text to find within the contents of files.

**Note:** GX4 continues to provide search functions that were available in earlier versions of Worldox.

The screenshot displays the Worldox GX4 Desktop interface. The top menu bar includes File, Edit, List, Search, Bookmarks, Display, Audit, Network, Project, Workflow, Help, and ShareFile. The toolbar contains icons for Open, View, Refresh, Advance, Direct, Home, Recent, and Email. The address bar shows the path \00060\0140 and a search icon. A dialog box is open, showing search options: Cancel, Default to File Contents, Default to Doc ID or Description (checked), Default to Doc ID or Description OR Contents, and Default to Doc ID or Description AND Contents. Below the dialog, the search results are displayed in a table format. The search criteria is 'Find: Name/Comm'. The results are grouped by category: AGR (Agreement) with 84 Files, ARTICLE (Articles of Incorporation) with 1 File, and BANKRUP (Bankruptcy) with 1 File. The first result under AGR is 'Adoption Agreement', which is expanded to show its contents: 'Rules of Court, rule 1464 Adoption Agreement'. The second result is 'Adoption Order' and the third is 'Adoption Placement Agreement'. The first result under ARTICLE is 'Certificate of Incorporation', which is expanded to show its contents: 'provisions, agreements with such agents or other persons, vote of stockholders'. The first result under BANKRUP is 'draft doc', which is expanded to show its contents: 'GAS SALES AGREEMENT'. A blue arrow points from the text 'Sample search results for files with "agreement" in the Doc ID or Description or Contents.' to the search results.

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

Category	File Name	Modified	Owner	Contents
AGR (Agreement) 84 Files	Adoption Agreement	7/8/2011 07:30 PM	User, Demo (ADE...)	Rules of Court, rule 1464 Adoption Agreement
	Adoption Order	7/8/2011 07:31 PM	User 5, Demo (A...)	The judge approves the Contact After Adoption Agreement (ADOPT-310) As amended on ADOPT-310 As submitted
	Adoption Placement Agreement	7/8/2011 07:36 PM	User 5, Demo (A...)	ADOPTION PLACEMENT AGREEMENT
ARTICLE (Articles of Incorporation) 1 File	Certificate of Incorporation	7/26/2011 11:39 AM	User 5, Demo (...)	provisions, agreements with such agents or other persons, vote of stockholders
BANKRUP (Bankruptcy) 1 File	draft doc	1/15/2012 10:40 AM	User, Demo (AD...)	GAS SALES AGREEMENT

# Enhanced Search Results

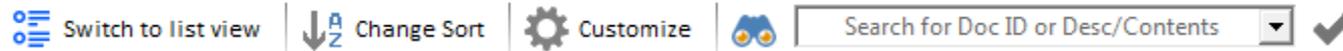
The following example shows search results for files that contain the text "act". A line appears below the file name to show the snippet of found text in the file. The word "act" displays in bold in each line. Arrows in the line under the file name indicate the next instance in the file where text was found. You are not required to open the file if you quickly need to confirm the occurrence(s) of text found.

The screenshot displays the Worldox GX4 Desktop interface. The search bar at the top indicates the search criteria: "Find: Name/Comment=act, Text=act; using Quick Access <Active>". The search results are organized into two columns. The left column, titled "28 Files", lists several documents with their modification dates, owners, and search snippets. The right column, titled "1 File", shows a single document with its modification date, owner, and search snippet. The search snippets highlight the word "act" in bold. Navigation arrows are visible under the file names in the search snippets.

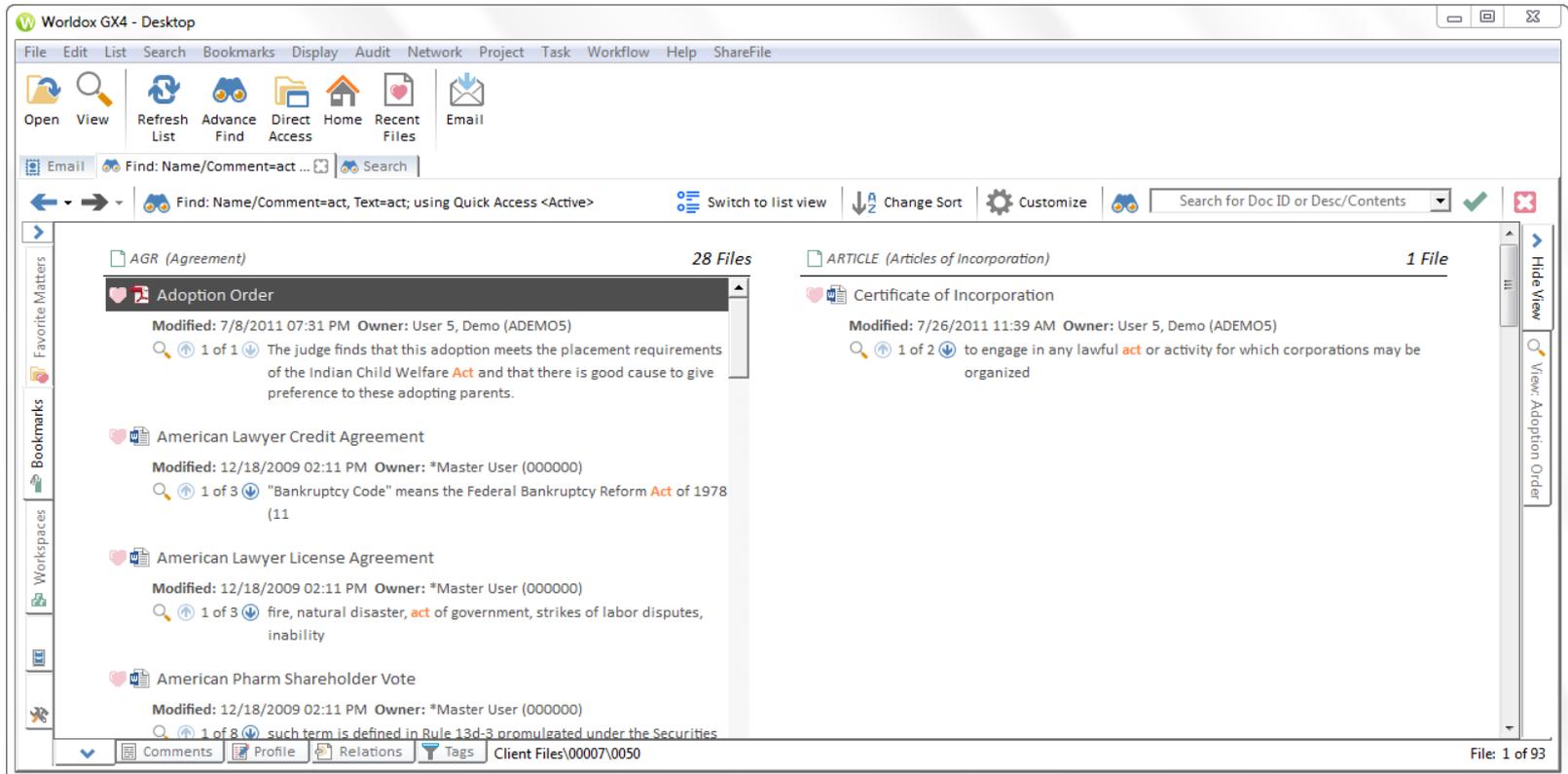
File Name	Modification Date	Owner	Search Snippet
AGR (Agreement)			
Adoption Order	7/8/2011 07:31 PM	User 5, Demo (ADEMO5)	The judge finds that this adoption meets the placement requirements of the Indian Child Welfare <b>Act</b> and that there is good cause to give preference to these adopting parents.
American Lawyer Credit Agreement	12/18/2009 02:11 PM	*Master User (000000)	"Bankruptcy Code" means the Federal Bankruptcy Reform <b>Act</b> of 1978 (11
American Lawyer License Agreement	12/18/2009 02:11 PM	*Master User (000000)	fire, natural disaster, <b>act</b> of government, strikes of labor disputes, inability
American Pharm Shareholder Vote	12/18/2009 02:11 PM	*Master User (000000)	such term is defined in Rule 13d-3 promulgated under the
ARTICLE (Articles of Incorporation)			
Certificate of Incorporation	7/26/2011 11:39 AM	User 5, Demo (ADEMO5)	to engage in any lawful <b>act</b> or activity for which corporations may be organized

# Search for Doc ID or Description/Contents

File lists and Tile views have Search for Doc ID or Description/Contents fields. Type search criteria in the field and then click the check mark icon.



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



# Improved Filter Bar

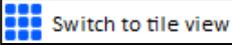
Filter any File list by Description / Comment or by File Extension

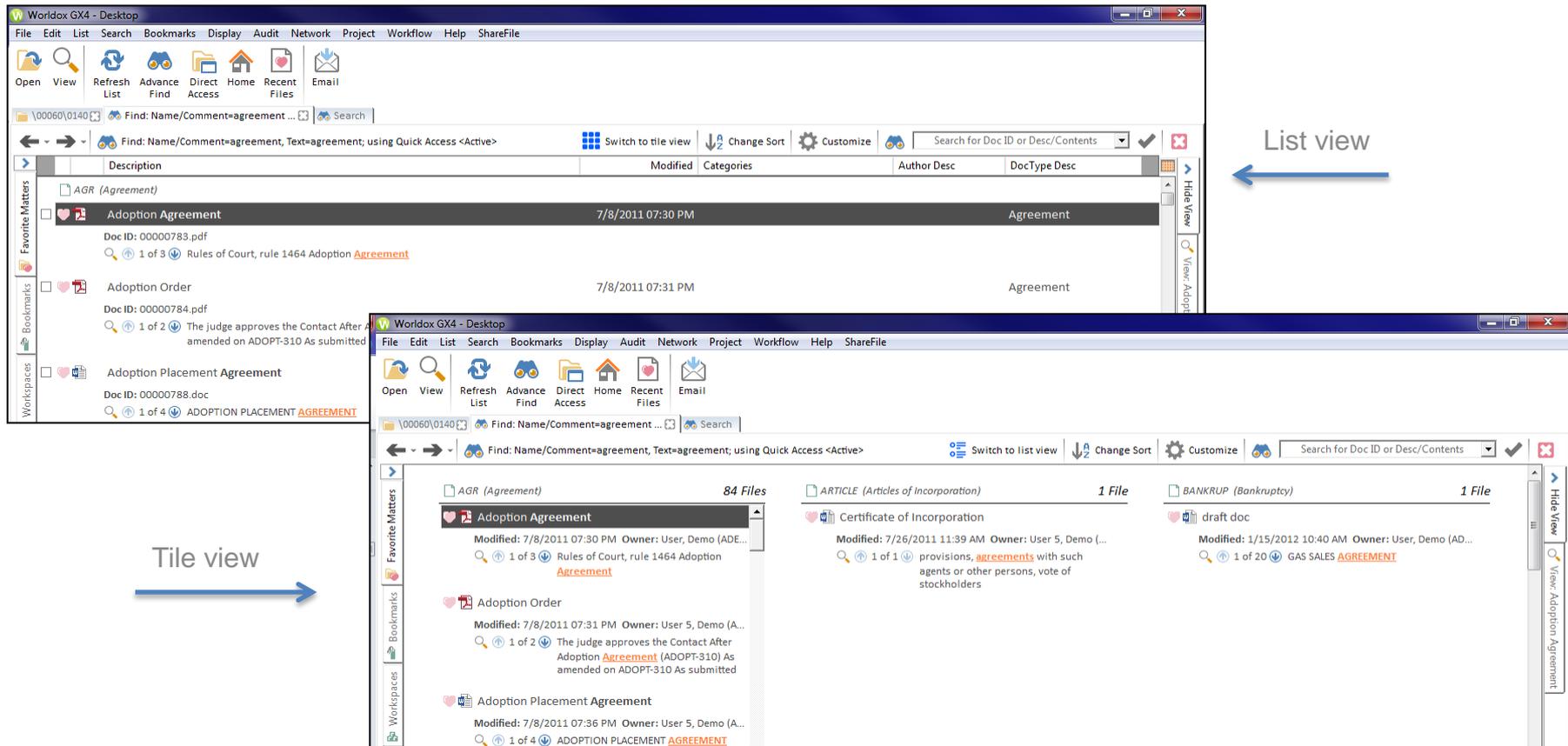


Drop down to see all extensions in current list or type in Description to filter on.

A screenshot of the Worldox GX4 Desktop application interface. The window title is "Worldox GX4 - Desktop". The menu bar includes File, Edit, List, Search, Bookmarks, Display, Audit, Network, Project, Task, Workflow, and Help. Below the menu bar is a toolbar with icons for Open, View, Refresh List, Home, Advance Find, Direct Access, Recent Files, Email, Edit Profile, and Comments in List. The main area shows a file list for "Cabinet=Client Files &lt;Active&gt;". The list is divided into three columns. The first column shows "Tucson Electric Power Company Attachments" with a sub-item "Post Feb Structure". The second column shows "BMS Supply Agreement" with sub-items "Stock Purchase Agreement" and "Notes from board meeting". The third column shows "City of Mesa-ENA-Gas Sales" with sub-items "Version# 5" and "Collaborative Research Agreement". A blue arrow points to the filter bar at the top right, which is open to a dropdown menu showing file extensions: All Files (\*.\*), \*.DOC - Microsoft Word 97 - 2003 Doc, \*.DOCX - Microsoft Word Document, \*.JPG - JPEG Image, \*.MSG - Outlook Item, \*.PDF - Adobe Acrobat Document, \*.PPT - Microsoft PowerPoint 97-2003, \*.PPTX - Microsoft PowerPoint Preser ver 6, \*.RTF - Rich Text Format, \*.WDL - WORLDDOX Project, \*.WPD - WordPerfect X7 Document, \*.XLS - Microsoft Excel 97-2003 Works, and \*.XLSX - Microsoft Excel Worksheet.

# Executive Tile/Grid or List Views

In the file list view, click the Switch to Tile View  button or select **Display > File View > Tiles** to view profile information for files in a grid view rather than list view. Tile views display groups of records in a rectangular tile. You can sort tile files by Date Accessed/Modified/Created, Category, DocType Code/Description, Author Code/Description or Typist Code/Description.



# Tile View Layout

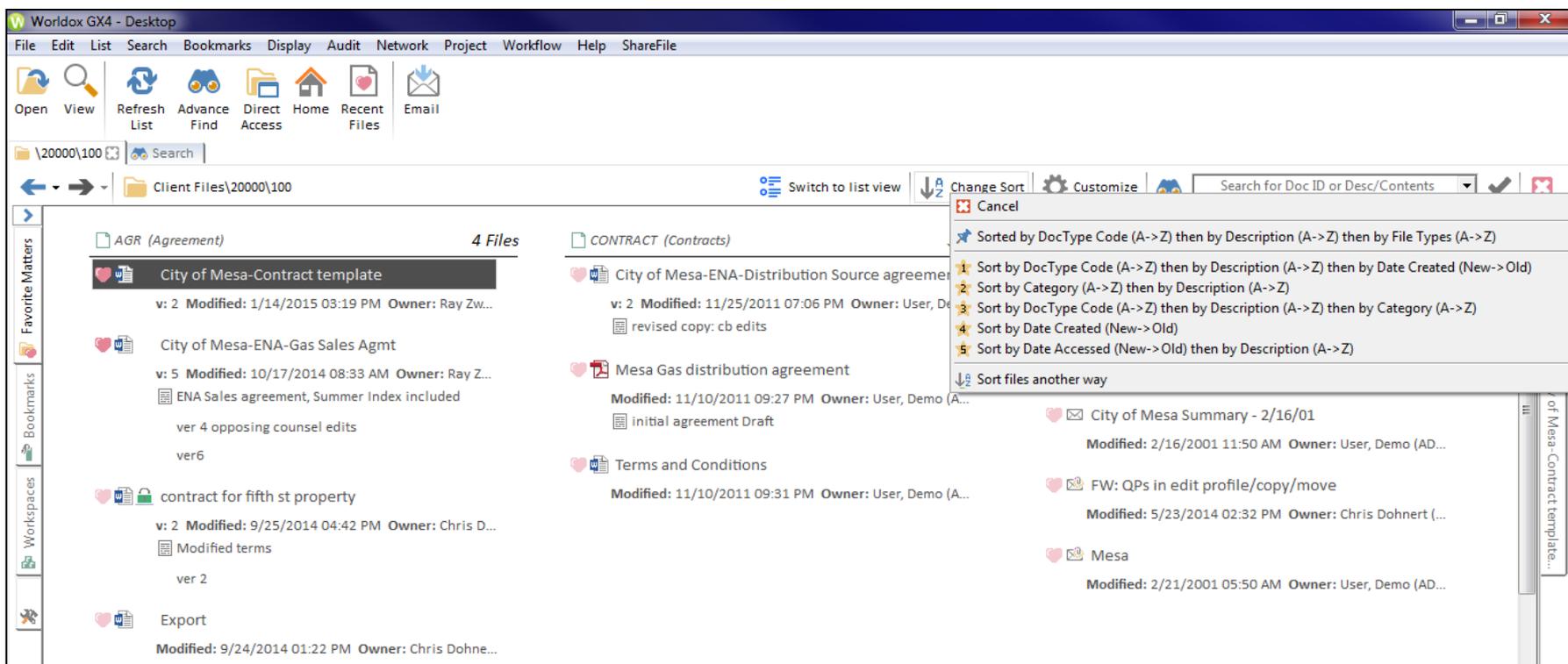
In the Tile view, click the **Customize** button and select **Tile columns/layout**. A dialog box opens where you choose your preferred layout and defaults based upon your personal preferences or monitor size.

In the following example, 2 columns per row are selected.

The screenshot displays the Worldox GX4 interface in tile view. The main window shows a list of documents under the heading 'AGR (Agreement) 84 Files'. The first document is 'Adoption Agreement', modified on 7/8/2011 07:30 PM by User, Demo (ADEMO), with 1 of 3 items. Below it are 'Adoption Order', 'Adoption Placement Agreement', 'Adoption Request', and 'Agreement Between Owner and Contractor'. To the right, under 'ARTICLE (Articles of Incorporation) 1 File', is 'Certificate of Incorporation', modified on 7/26/2011 11:39 AM by User 5, Demo (ADEMO5), with 1 of 1 items. A dialog box titled 'Worldox GX4 - Tile columns/layout' is open in the foreground. It features a 2x2 grid icon and settings for 'Layout' (Max columns per row: 2, Pixels between columns: 40, Pixels between rows: 30) and 'File Lists' (Frame them: unchecked, Max lines: 5, Min Width (pixels): 350). The 'Save tile layout for:' section has 'Only Me' selected. The dialog has 'OK' and 'Cancel' buttons.

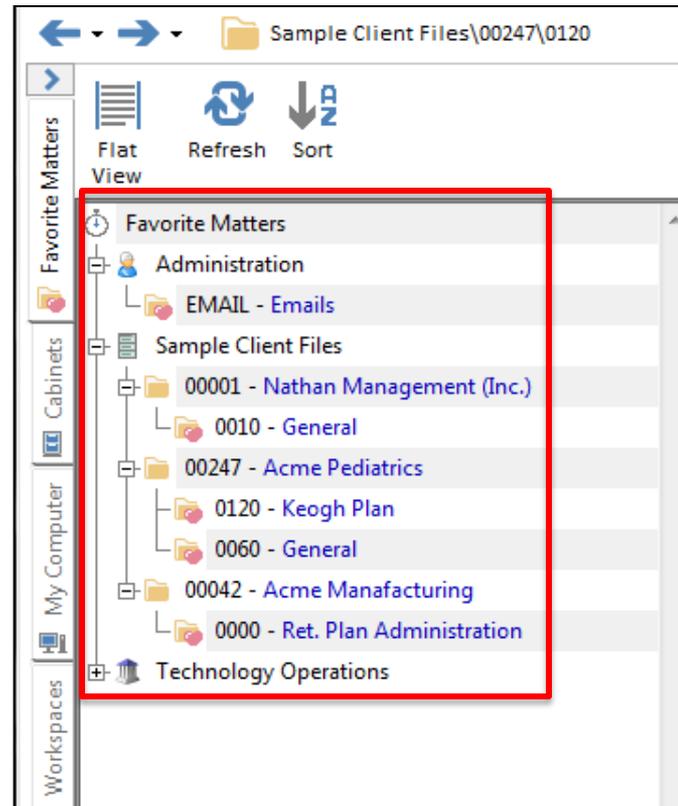
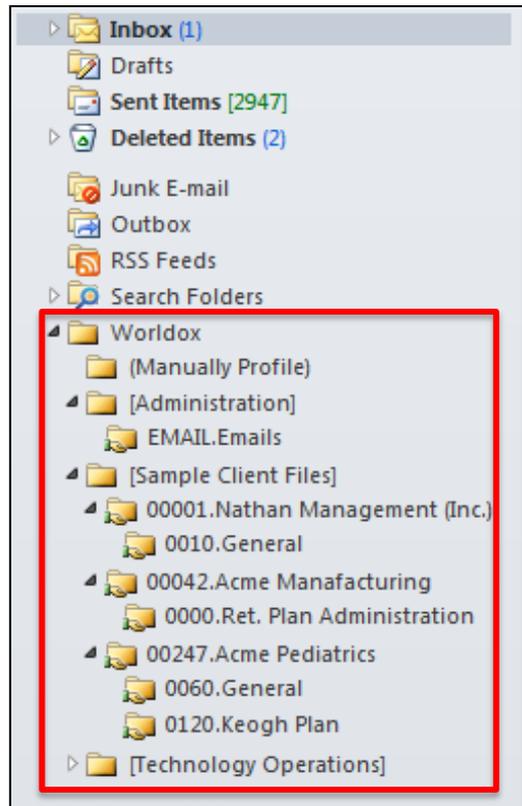
# Change File Sorting in the Tile View

In the Tile view, select **Change Sort** and choose to sort by dates, doc types, categories and other key fields. Content is presented per your sort field in a summarized manner to quickly find the file you need.



# Microsoft Outlook Drop Folders now Automatically Correlate with Favorite Matters

Favorite Matters will appear as Worldox drop folders within Microsoft Outlook. You can easily move your incoming and outgoing emails to these folders in Outlook so that they are immediately saved into Worldox.



# Microsoft Outlook 'Active Profiling'

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

The screenshot displays the Microsoft Outlook interface with the Worldox ribbon active. The ribbon includes the following buttons: Copy, Move, Update Column, Copy, Move, Clear Column, Refresh, and Quick Profiles. Below the ribbon, the email list is shown with a new column titled 'WORLDFOX PROFILE'. The email list is organized by date, with sections for 'Date: Today', 'Date: Yesterday', and 'Date: Older'. The 'WORLDFOX PROFILE' column contains client and matter information for each email.

FROM	SUBJECT	RECEIVED	WORLDFOX PROFILE
<b>Date: Today</b>			
Ray Zwiefelhofer	test	Wed 1/28/2015 3:...	Client: 00102   Matter: 0020
Ray Zwiefelhofer Ray Zwiefelhofer President World Software Corporation	spreadsheet for options	Wed 1/28/2015 2:...	Client: 00102   Matter: 0020
Ray Zwiefelhofer	FW: LTN Afternoon Update: Le...	Wed 1/28/2015 1:...	Client: 00102   Matter: 0020
From: Law Technology News [mailto:lawtechnologynews@alm.com] Sent: Tuesday, January 27, 2015 4:04 PM To: Ray Zwiefelhofer			
Ray Zwiefelhofer	FW: ILTA News Bulletin: Januar...	Wed 1/28/2015 1:...	Client: 00102   Matter: 0020
From: Peggy Wechsler [mailto:ilta@iltanet.org] Sent: Tuesday, January 27, 2015 5:06 PM To: Ray Zwiefelhofer			
<b>Date: Yesterday</b>			
Ray Zwiefelhofer	FW: Revised mobility brochure...	Tue 1/27/2015 3:4...	Client: 00102   Matter: 0020
From: Helle Grossman Sent: Tuesday, January 27, 2015 3:36 PM To: Ray Zwiefelhofer			
<b>Date: Older</b>			
demo@rayz.us	Workflow#120124.1507.45.6 (C...	Tue 1/24/2012 3:2...	Client: 20000   Matter: 100
i need back asap			

# View Worldox Content from within Outlook

In Microsoft Outlook, double-click a matter folder under Worldox to launch the Worldox file list. Click a file to preview content directly from Outlook.

The screenshot displays the Microsoft Outlook interface with the 'Worldox' add-in active. The ribbon includes 'FILE', 'HOME', 'SEND / RECEIVE', 'FOLDER', 'VIEW', and 'ADD-INS'. The 'Worldox' tab is selected, showing options like 'Copy', 'Move', 'Update Column', 'Refresh', and 'Quick Profiles'. The left sidebar shows the 'Favorites' pane with 'Worldox' expanded to show a folder named '0140.Fifth Ave Real estate Pu...'. The main pane shows a file list for 'Client Files\00060\0140' with 5 files listed, including 'Confidentiality agreement' (modified 12/18/2009), 'Power of Attorney Form' (modified 7/14/2011), 'Software Development and Distribut...' (modified 7/4/2014), 'Stock Purchase Agreement' (modified 7/24/2011), and 'WSC agreement' (modified 7/8/2014). The 'Confidentiality agreement' file is selected, and its content is previewed in the right pane. The preview shows a document titled 'Confidentiality agreement (Client Files\00060\0140\00001044.WPD)' with the following text:

STATE OF \_\_\_\_\_  
COUNTY OF \_\_\_\_\_ AGREEM

THIS AGREEMENT entered into this the \_\_\_\_th day of \_\_\_\_\_  
COMPANY) Inc., (hereinafter referred to as "COMPANY"), and  
referred to as "Confidant").

W I T N E S S E T H :

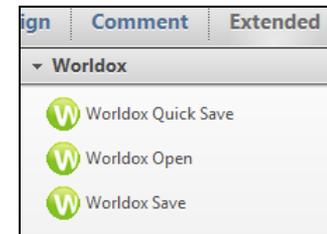
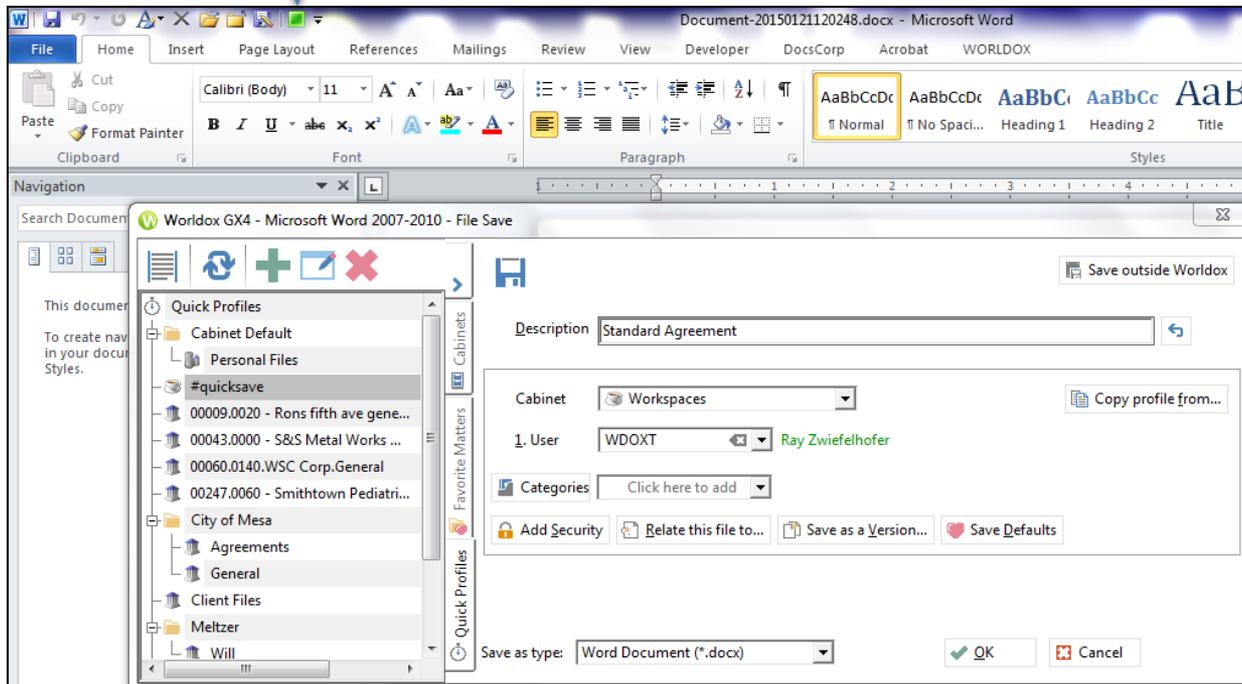
WHEREAS, Confidant is an employee, salesman, or in  
COMPANY), or other person or organization with access

# Microsoft Office QuickSave and Search

File and find documents quickly without leaving your office application. Click the green Worldox Quick Save button in Word, Excel or Adobe Reader to save a file into Worldox. You can add profile information at a later time.

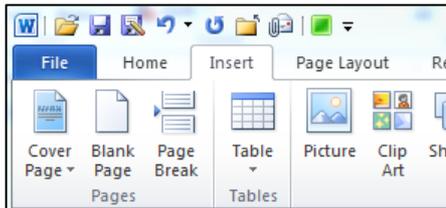
WD-QuickSave button in Microsoft Office

WD-QuickSave button in Adobe Reader

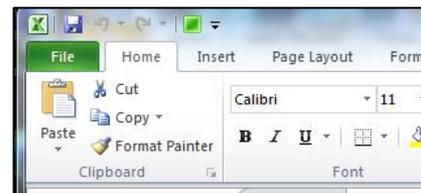


# QuickSave One-click Save

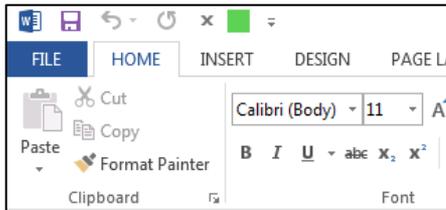
The QuickSave feature allows user to save a file into Worldox without a profile card based on a pre-defined Quick Profile template. This allows you to save a file into Worldox immediately with the option to re-profile it at a later time. This feature uses predefined Quick Profile(s) to quickly save the file to a named Worldox Quick Profile without any interaction. The feature can be accessed by using the **green** icon in the Microsoft Quick Access Toolbar. You can also access a Worldox Quick Save button from Adobe Reader.



Word 2007-2010



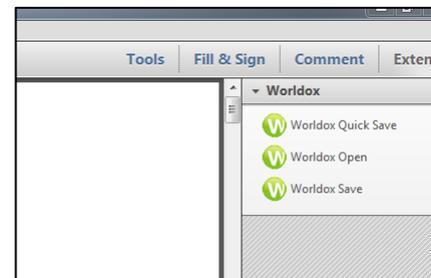
Excel 2007-2010



Word 2013



Excel 2013



Adobe Reader

# Set QuickSave by Application

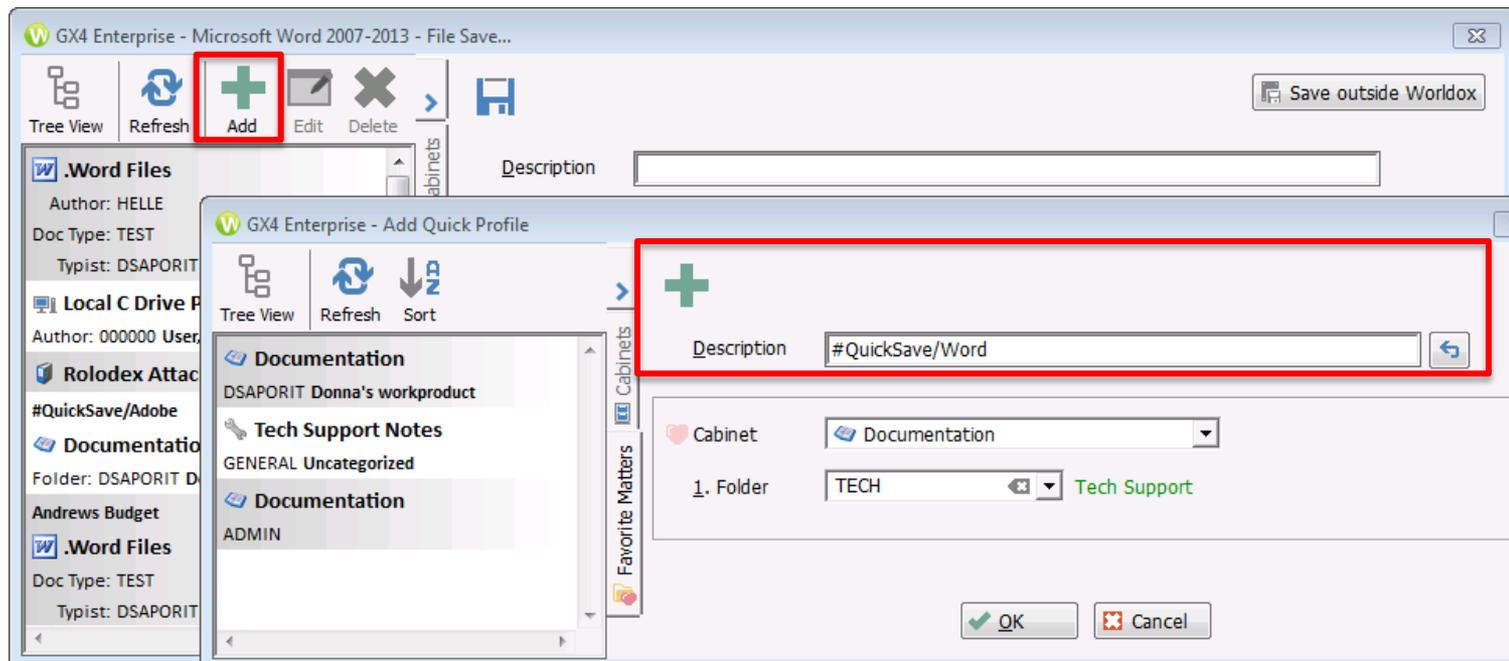
You can still set global and personal Quick Profiles in Worldox, but now you can also set Quick Profiles by application. This overrides the generic predefined #QuickSave.

To set this, add *"/application\_name"* to the Quick Profile name when you add a new Description for a Quick Profile. For example:

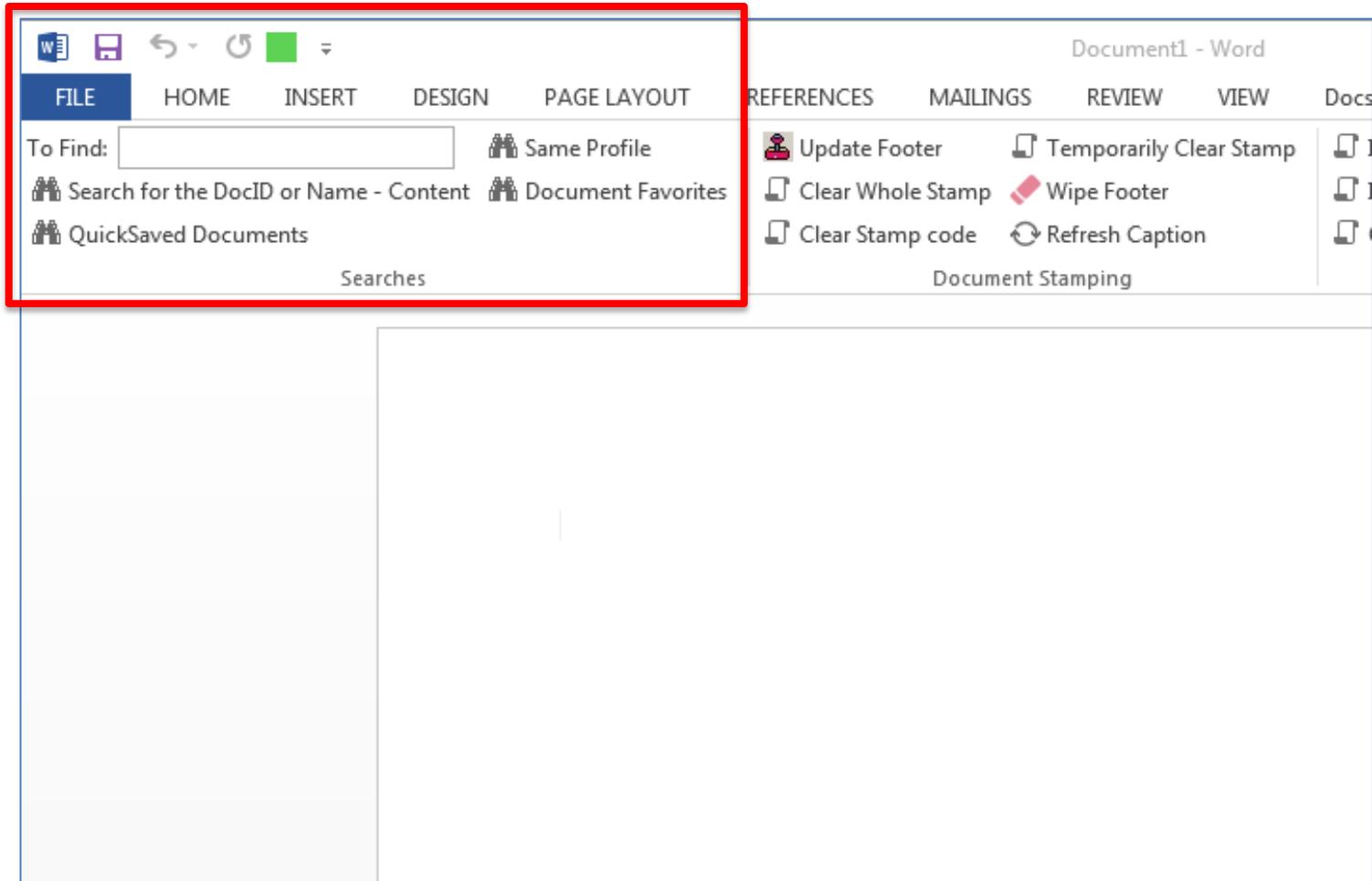
#QuickSave/Word for use with Word 2007-2013

#QuickSave/Excel for use with Excel 2007-2013

#QuickSave/Adobe for use with Adobe Reader X and Acrobat X and higher



# Redesigned Toolbar to Quickly Perform Searches within Word and Excel

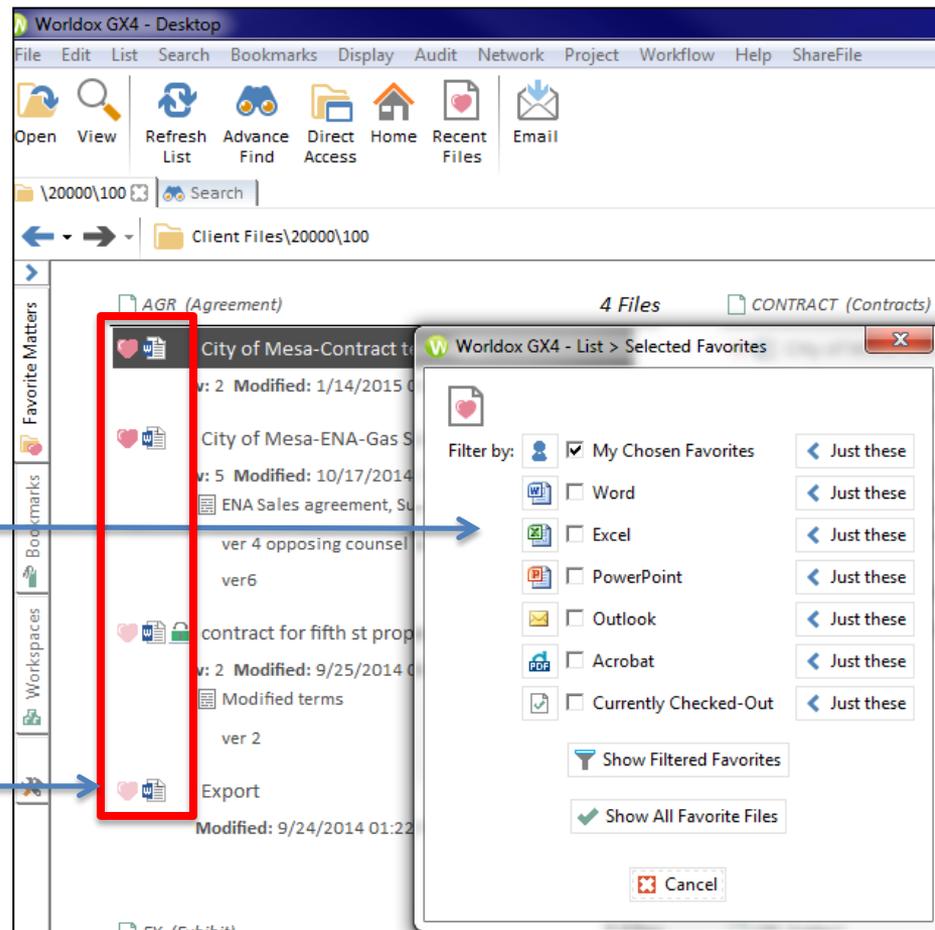


# Selecting One-click Favorites within the New, Streamlined Interface

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

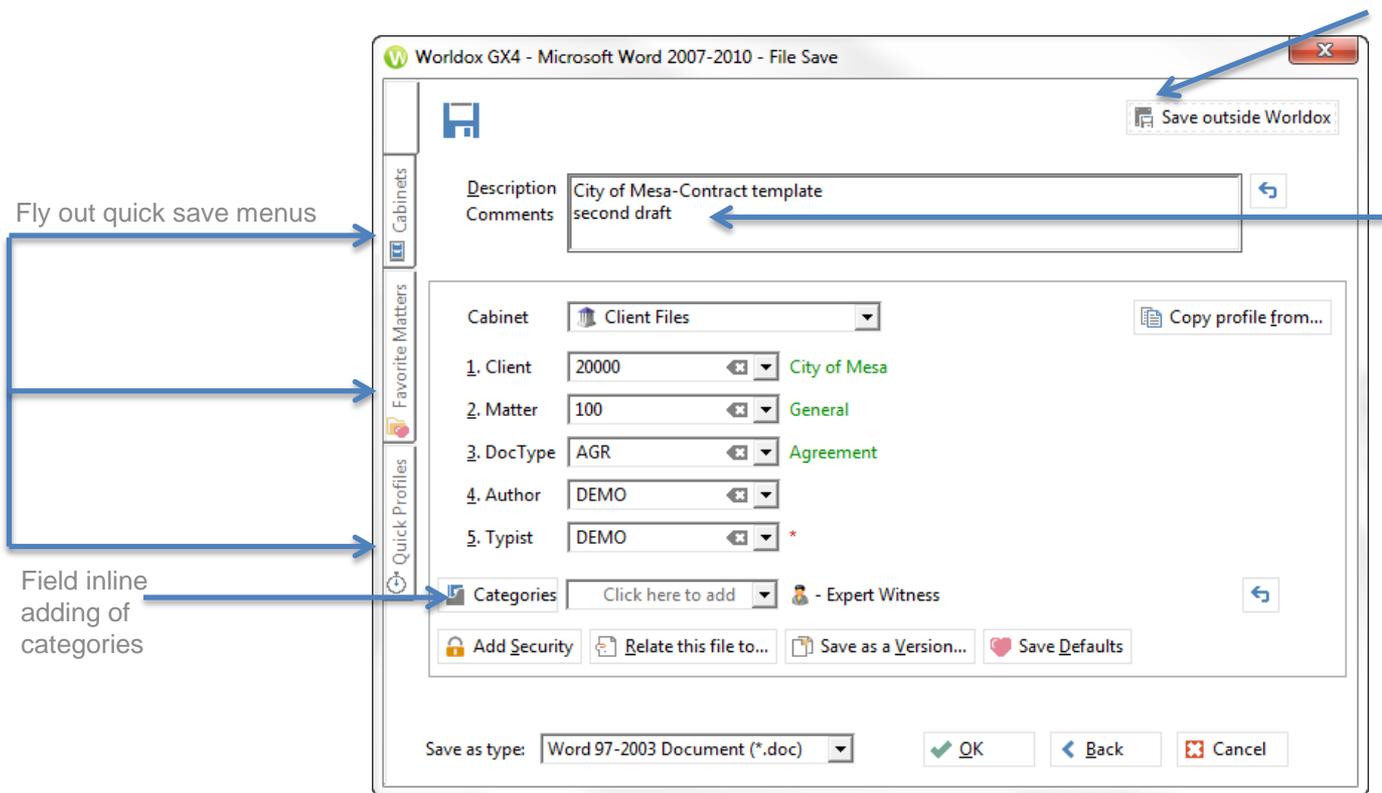
In the List > Selected Favorites dialog, you can select file types to filter in order to view selected files in the list or tile view.

Unclick a heart  icon next to a file if you no longer want it to appear as a Favorite.



# Reorganized File Save Dialog

File Save dialog boxes now feature convenient Cabinets, Favorite Matters and Quick Profiles tabs. When you save a new file, click one of those tabs and then double-click an item in the list to populate profile fields with different information. In the following example, the file is originally being saved to the Client Files cabinet with profile metadata pertaining to that cabinet.

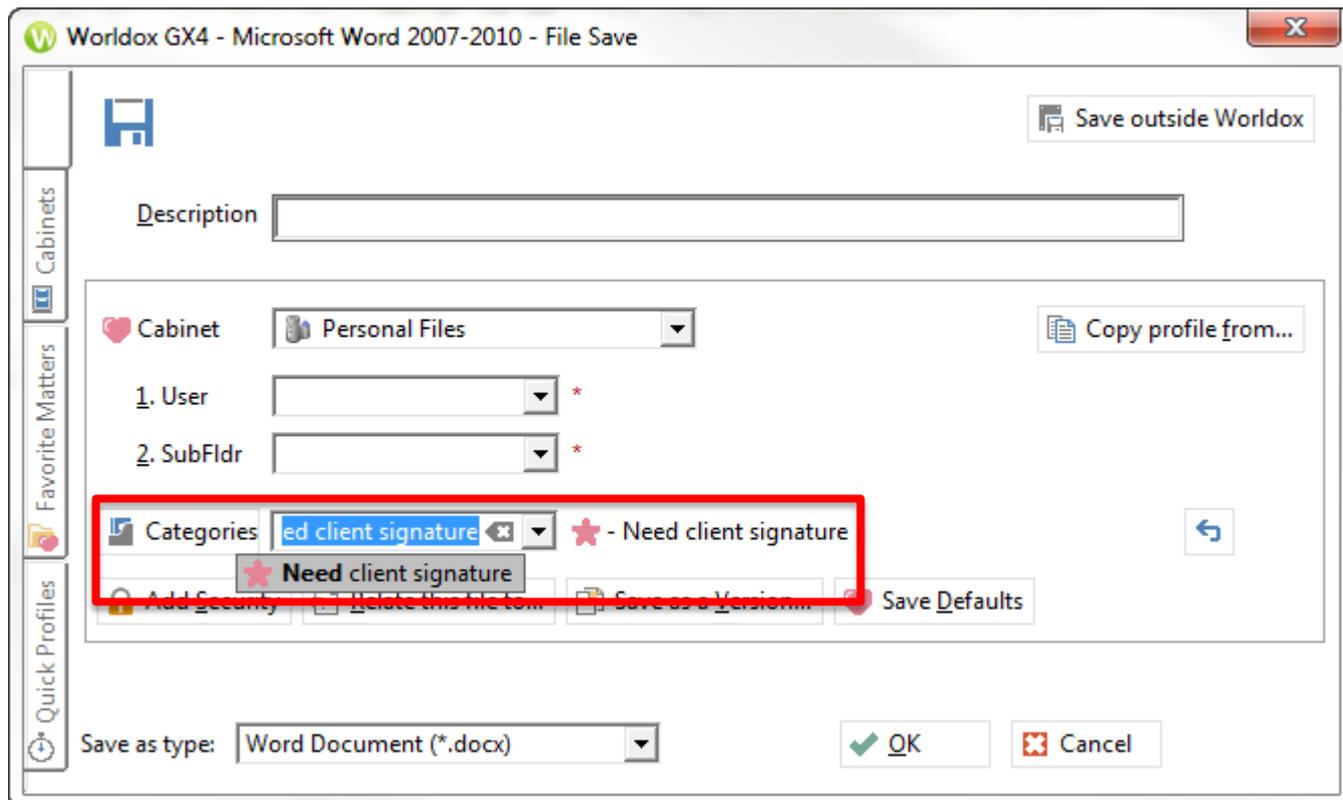


Save files outside of Worldox by launching the native save dialog for the program you are running.

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

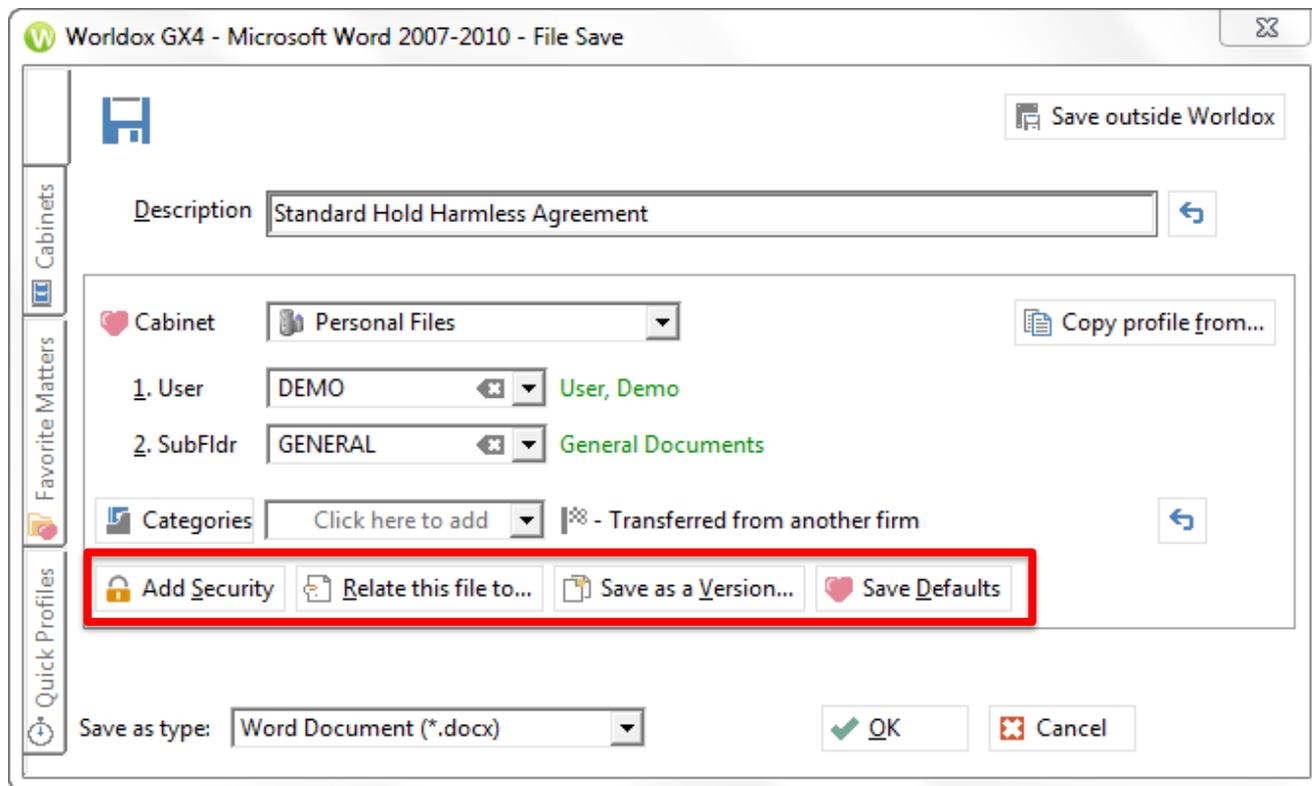
# Edit Categories from the File Save Dialog

You can quickly assign or edit categories from the File Save dialog. In the Categories field box, start typing the name of the category you want to assign to automatically select it. Or you can click the drop-down button next to the field box to select a category from the list of names. Click **Undo**  to make changes if necessary.



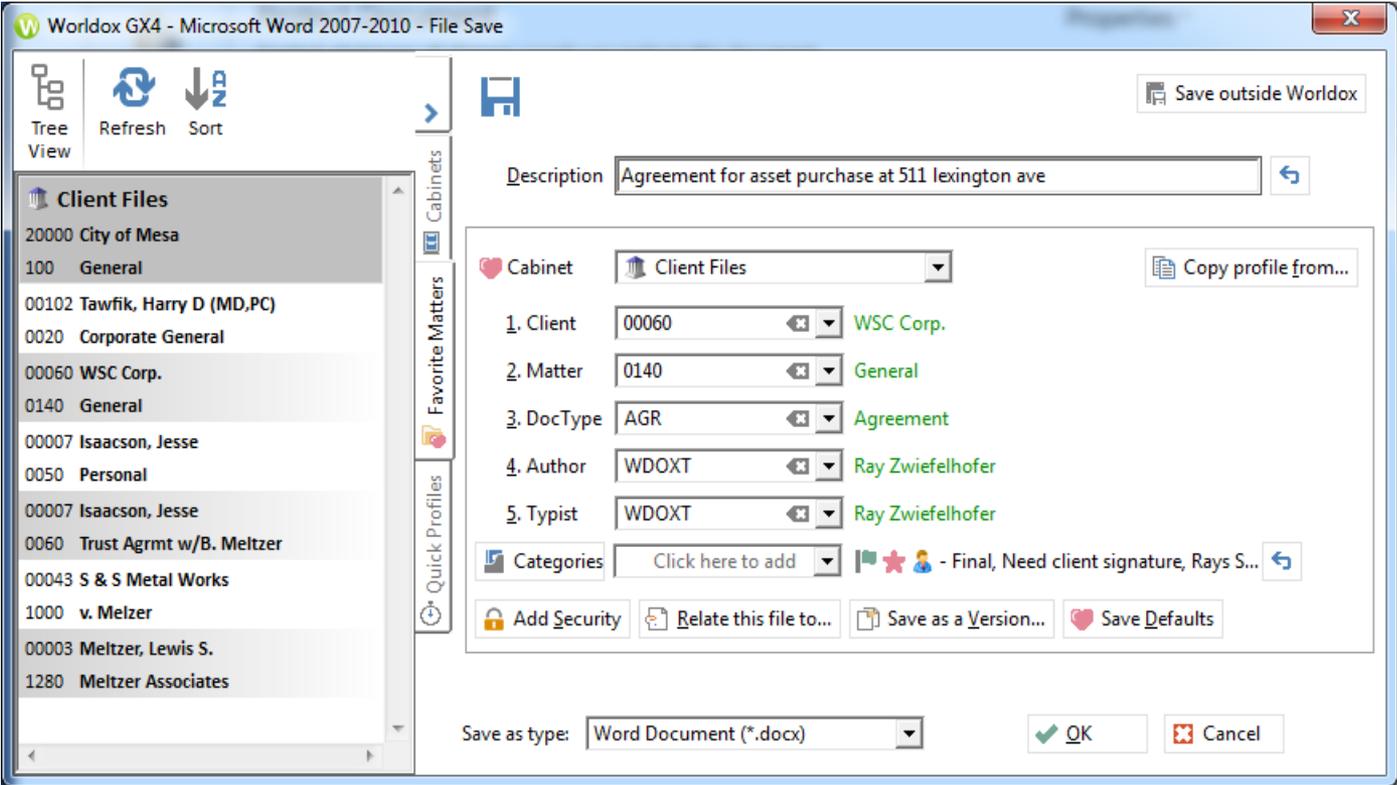
# Edit Security, Relations, Versions and Defaults from the File Save Dialog

The File Save dialog features buttons that allow you to assign security groups, relate the file being saved to another file, save the file as a new version or save defaults.



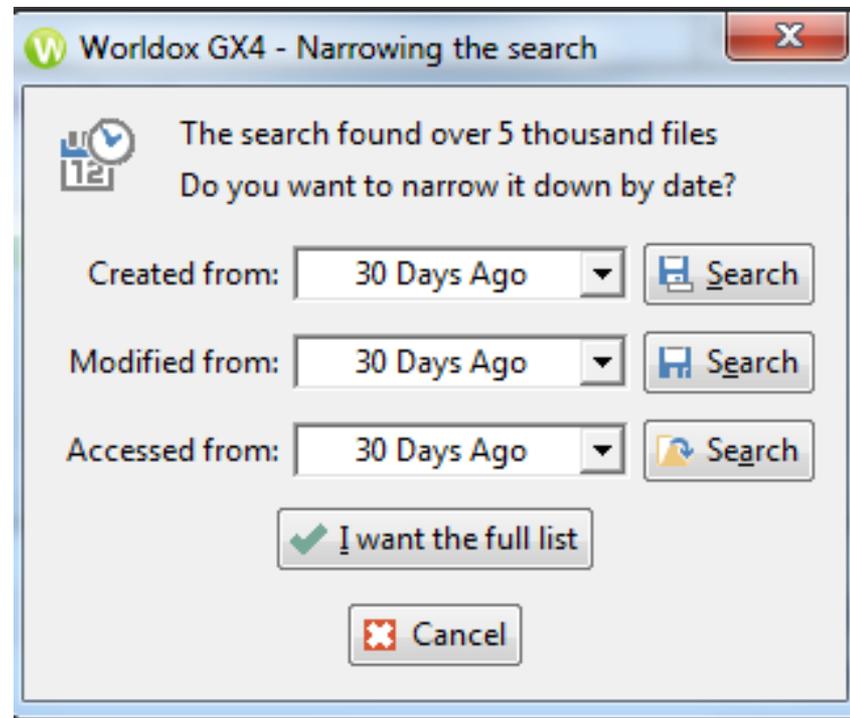
# Follow Me Favorites

Access Follow Me Favorites in the Save dialog by clicking the **Favorite Matters** tab. You can quickly profile and save files into favorite matters that you have recently accessed. Follow Me Favorites are also available in Worldox/Web Mobile and on other devices.



# Intelligent Find

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



# Category Find

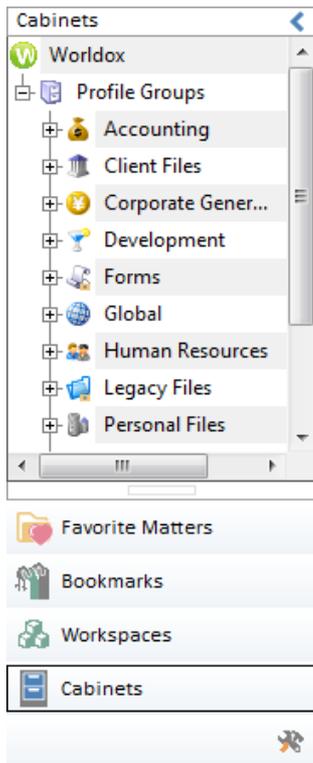
You can now search for files based upon their Global or Personal Category in real time.

The image displays two windows from the Worldox GX4 software. The left window, titled "Worldox GX4 - Customize Find Fields", shows a list of "Available Fields" including "Email From", "Email To", "Email CC", "Email BCC", "Email Sent", and "Email Addr". The "Active Fields" list includes "Category", "Name/Comment", "Doc ID", "Owner Inits", "Date Created", "Date Modified", "Date Accessed", "Text in File", "Profile Group", and "Search What". The "Email Addr" field is selected in the available list, and the "Category" field is selected in the active list. The right window, titled "Worldox GX4 - Find Files - Quick Access", shows search criteria: "Category" set to "Real Estate", "Name/Comment" set to "storage", "Text in File" set to "agreement", and "Search What" set to "Active". The "Category" field in the search window is highlighted with a blue arrow pointing from the "Active Fields" list in the customization window.

# Minimizing the Navigation Panel

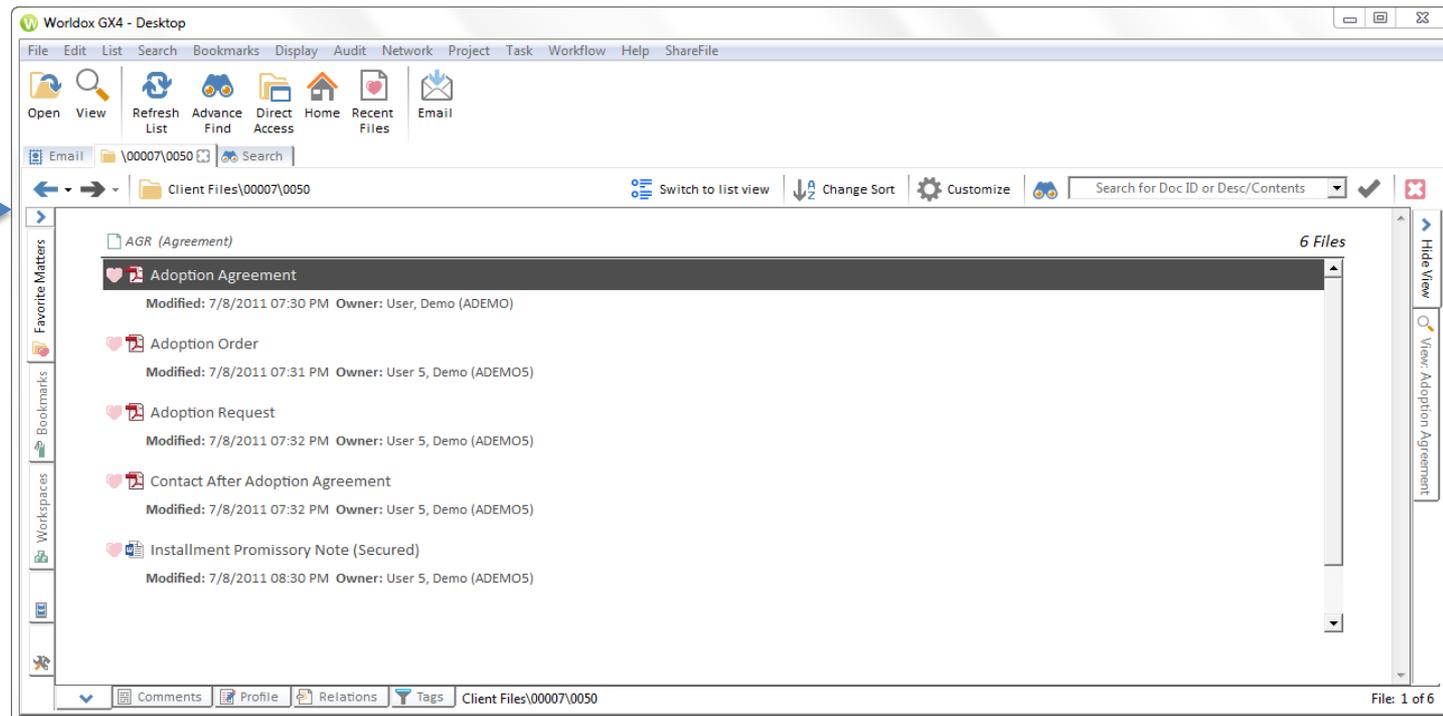
Increase the amount of space for your Worldox file list by minimizing the Navigation Panel. The minimized Navigation Pane collapses into a vertical bar of buttons that still provides access to your most used folders and views.

By default, the full Navigation Panel is shown.



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

→ When the Navigation Panel is minimized click the right arrow to expand it.

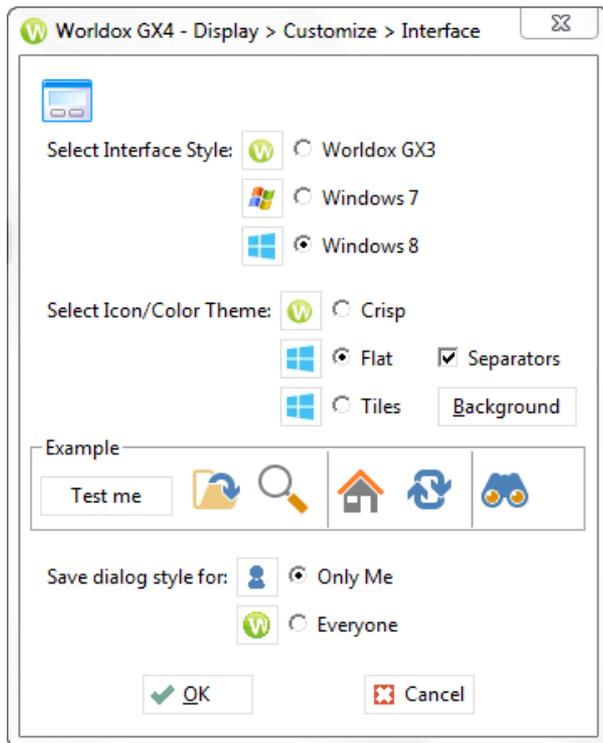


# Customize the User Interface Theme

Select from three (3) different Interface Styles and choose the icons and color themes you want to see in your Worldox environment. From the Worldox menu, select **Display > Customize > Interface**. In the dialog box that appears, select one of the following **Interface Styles**:

- **Worldox GX3**. This interface uses GX3 button styles. For example, the buttons are rectangular and have a light border.
- **Windows 7** (the default view). This interface shows buttons with the rounded look of Microsoft Office 2010. Borders of buttons become dark when selected.
- **Windows 8**. This interface shows the flat buttons used in Microsoft Office 2013. Button borders are light by default, but become darker once you hover over or click them.

**Note:** Preview how buttons will look in the interface of your choice by clicking the Test me button in the Example section of the **Display > Customize > Interface** dialog.



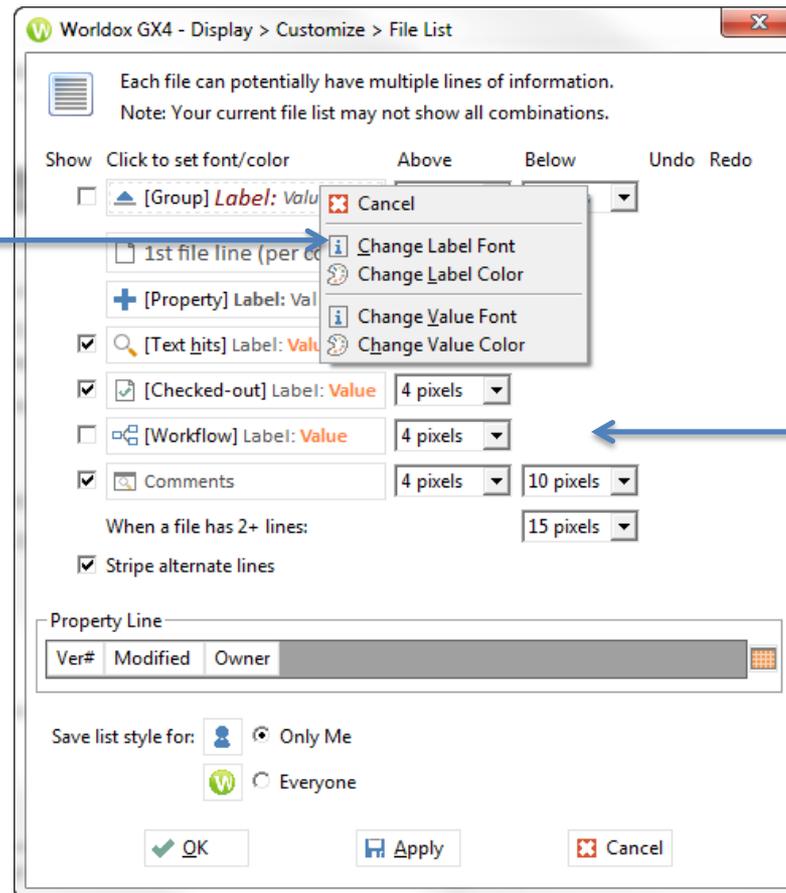
Select the type of **Icons** and **Color Themes** you want to see in Worldox:

- **Crisp** reverts to the type of icons used in Worldox GX3.
- **Flat** (the default Icon/Color Theme) uses flat vector icons shown in Worldox GX4.
- **Separators** insert dividing lines between icons.
- **Tiles** uses icons similar to Microsoft Office 2013's tile icons.

# Customizing the File List

GX4 provides a variety of ways to easily customize fonts, colors and spacing in your file lists. From the Worldox menu, select **Display > Customize > File List**.

In the **Display > Customize > File List** dialog, click a user interface property and change the font or color.

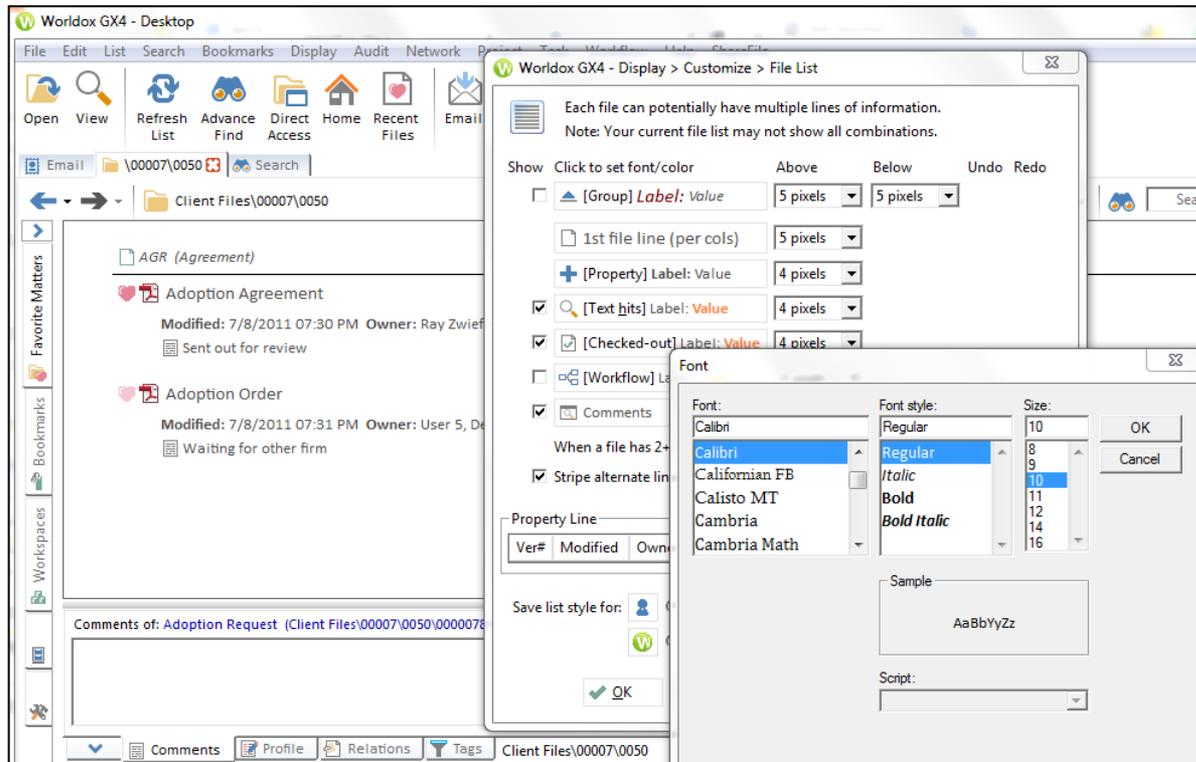


Select different pixel values to increase or decrease spacing between user interface items.

# Customize a Font in the File List

In the following example, comments in the file list use the Calibri font. To change them, do the following:

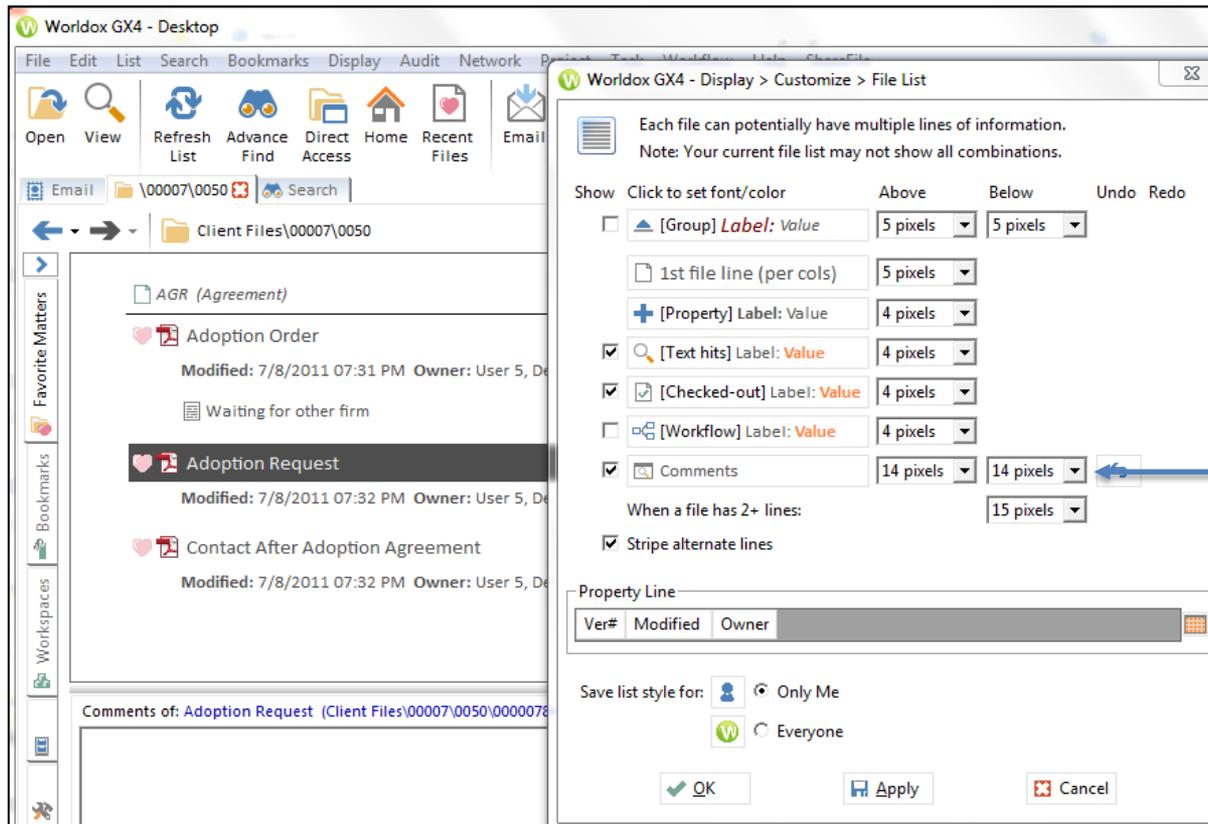
1. Select a file in the list.
2. From the Worldox menu, select **Display > Customize > File List**. The Display > Customize > File List dialog appears.
3. In the Comments field, left-click and select **Change Font**. Use the Font dialog box to make changes.



# Customize Margins in the File List

In the following example, more space is created for comments lines in the file list.

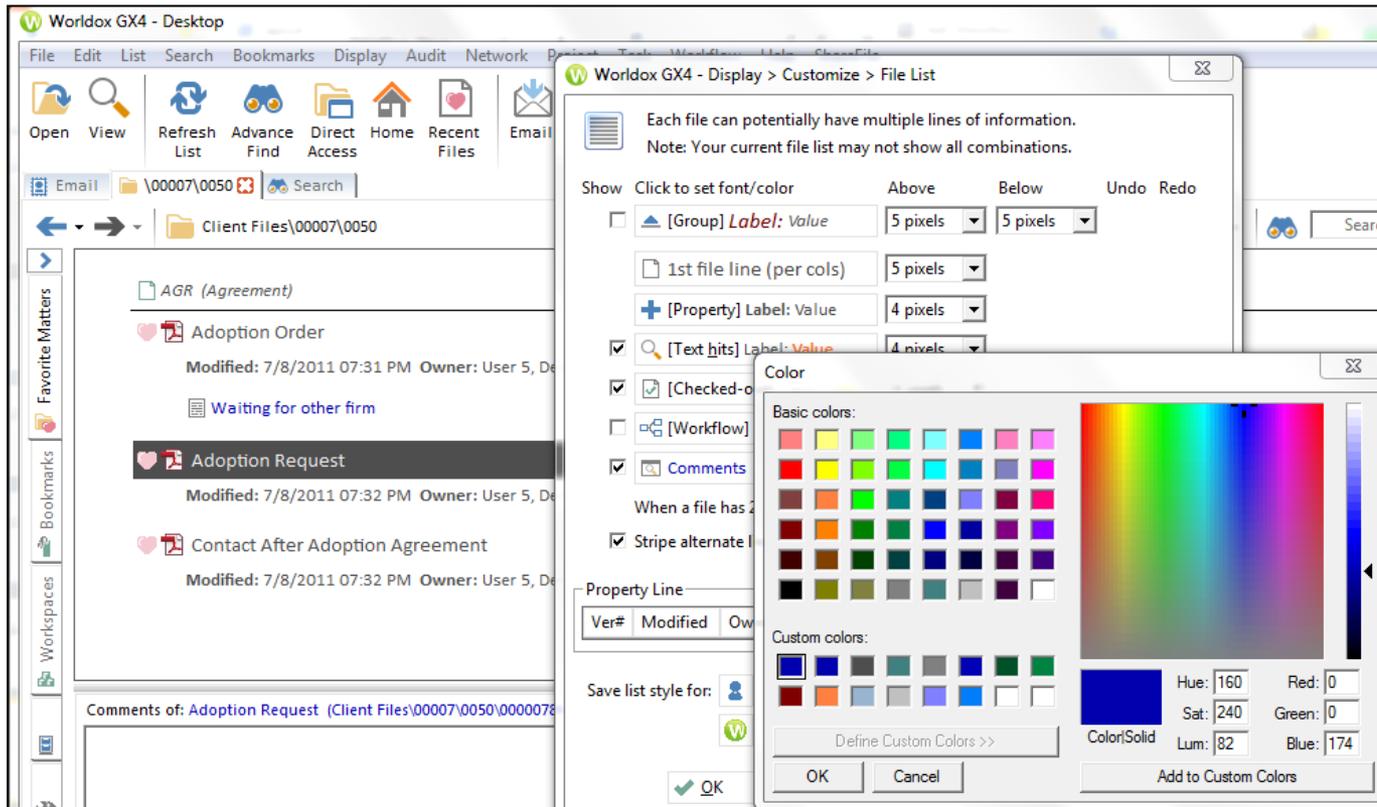
1. Select a file in the list.
2. From the Worldox menu, select **Display > Customize > File List**. The Display > Customize > File List dialog appears.
3. Select a different value for pixels for Above and Below options for Comments.



# Customize a Color in the File List

In the following example, comments in the file list are blue. To change the color, do the following:

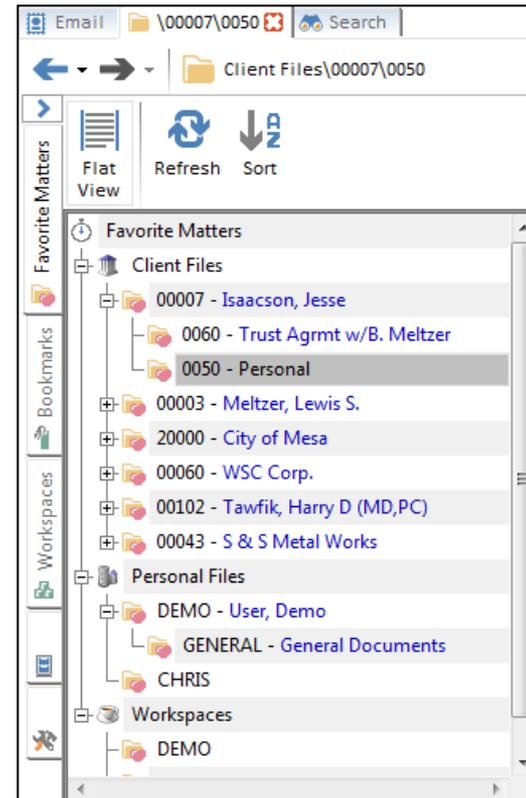
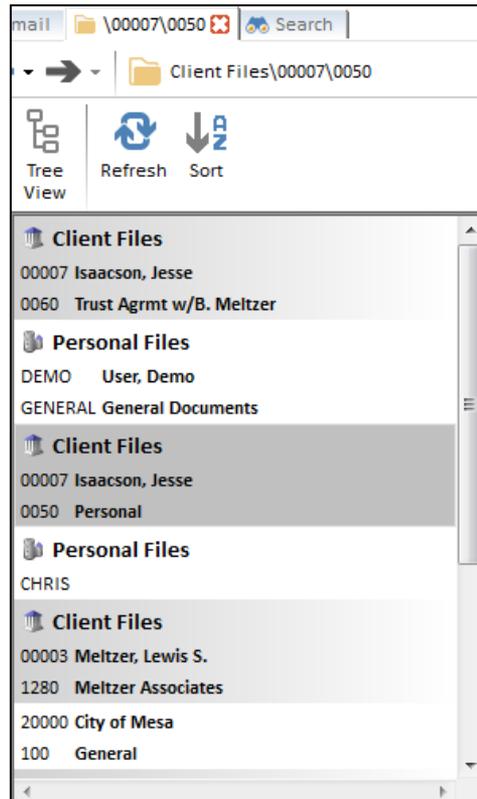
1. Select a file in the list.
2. From the Worldox menu, select **Display > Customize > File List**. The Display > Customize > File List dialog appears.
3. In the Comments field, left-click and select **Change Color**. Use the Color dialog to make changes.



# List Favorite Matters and Quick Profiles in Tree or Flat Views

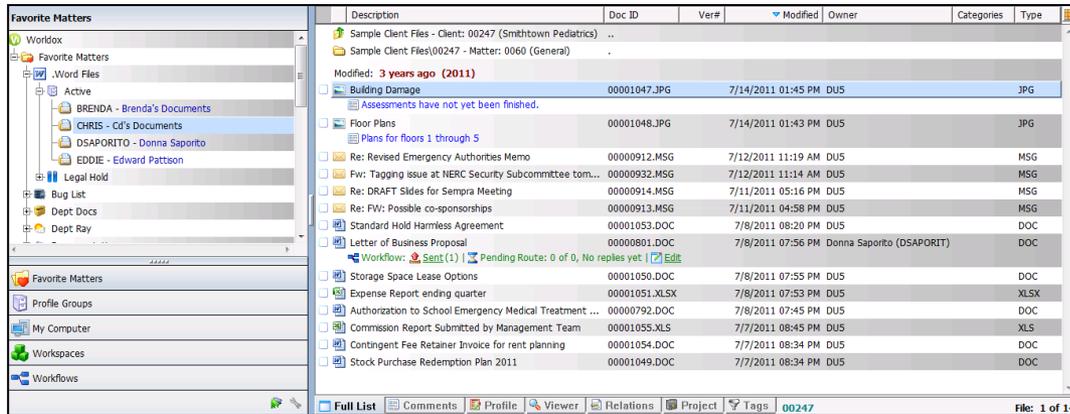
In previous versions of Worldox, the Favorite Matters tab in the Navigation Panel showed Worldox, Profile Group name, and Active folder with sub-folders.

In Worldox GX4, you have the option of selecting Tree or Flat views when you view Favorite Matters or Quick Profiles in the Navigation Panel.

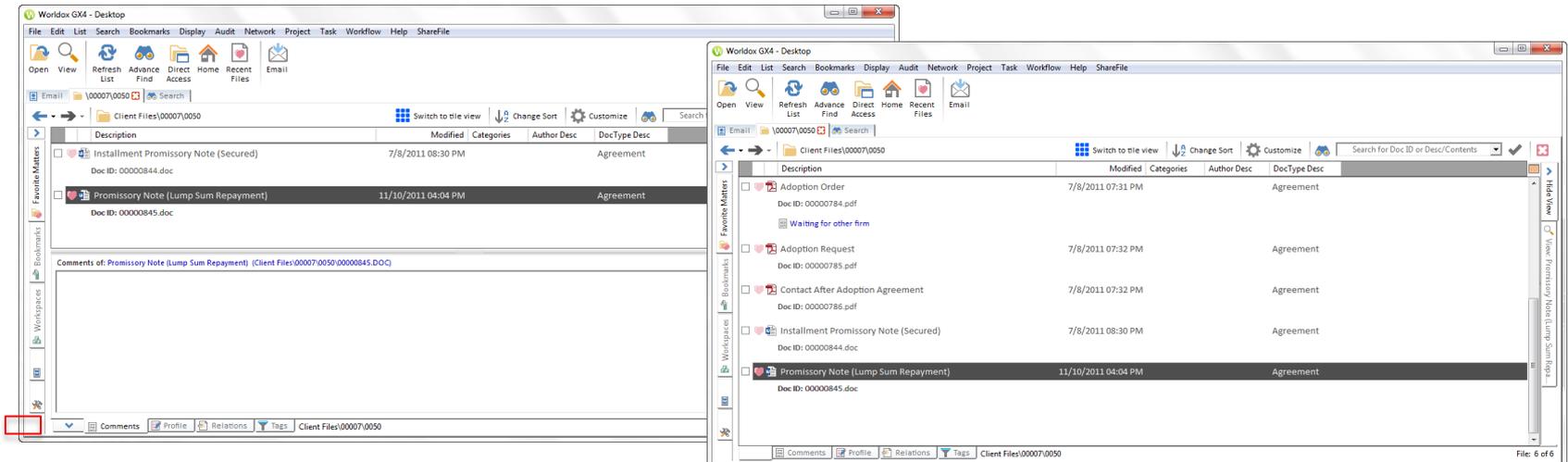


# Full List Tab Has Been Replaced with the Arrow Icon

In previous versions of Worldox, the first tab in the bottom tab bar was named “Full List”:

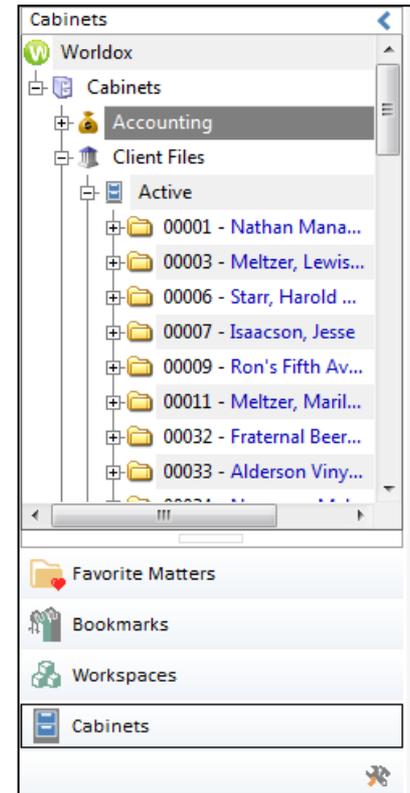
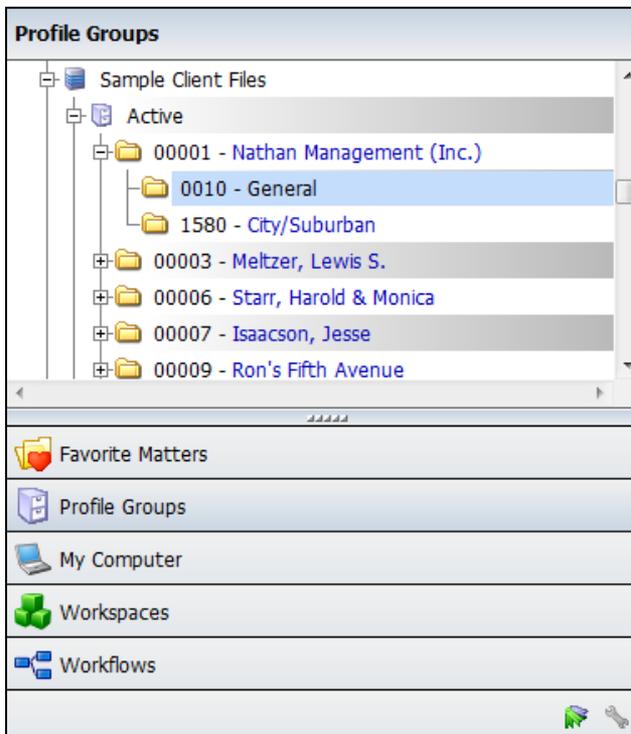


In Worldox GX4, you can simply click an  arrow button next to the bottom tabs to view the full file list.



# Cabinets Folder Tree Has Replaced Profile Groups

In previous versions of Worldox, a Profile Group was a category of profiles (a form used to profile documents). Worldox GX4 now refers to that as a Cabinet. For example, you may have one cabinet for administrative documents and another cabinet of documents associated with litigation. Each cabinet utilizes a unique profile form, with a characteristic set of fields. As individual documents are profiled, users first select the cabinet, then use that group's profile form to describe the document.





Copyright © 2015 World Software Corporation. All rights reserved. No part of this work may be reproduced or copied in any form or by any means, graphic, electronic or mechanical, including photocopying, recording, taping, or information and retrieval systems, without prior written permission of World Software Corporation.

For permission, please contact World Software Corporation Reprints, 266 Harristown Road Suite 201 Glen Rock, NJ 07452, or email [helle@worldox.com](mailto:helle@worldox.com).