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# WORLDOX

FOR LEGAL PROFESSIONALS

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# **WORLDOX**

## **FOR LEGAL PROFESSIONALS**

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## MEET OUR WORLDOX EXPERT

Meet our Worldox expert who authored this manual.



### PAUL UNGER

While most people understand the day-to-day struggle of keeping up with email and managing documents, Paul knows how to tackle the problem better than anyone. Paul's passion is coaching lawyers on managing time, distractions, tasks, emails, and documents efficiently. As the author of *Tame the Digital Chaos – A Lawyer's Guide to Time, Task, Email and Distraction Management*, Paul is truly an expert on the topic.

Paul's expertise is well-founded from his time practicing law. When Paul isn't coaching lawyers, he teaches CLE classes for attorneys across North America.



# WORLDOX FOR LEGAL PROFESSIONALS

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# CHAPTER 3

# SEARCHING / DOCUMENT ACCESS

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

## Favorites List

Favorites are files you have recently saved or otherwise acted upon or touched. Worldox “remembers” and lists up to a specified number that you can set (usually 20-50) of recently accessed files in each Favorites category. For instance, if you save or open a Word document, Worldox automatically adds that Word document to the **Favorites > Word** list. When you start using Worldox, you may have just a few favorite categories listed. As you work with more programs and work with files more Favorite categories change to reflect this activity.

From the Worldox main window, click on the **Favorites** toolbar, or select **Selected Favorite Files** from the List pull-down menu. That opens the List > Selected Favorite Files dialog.

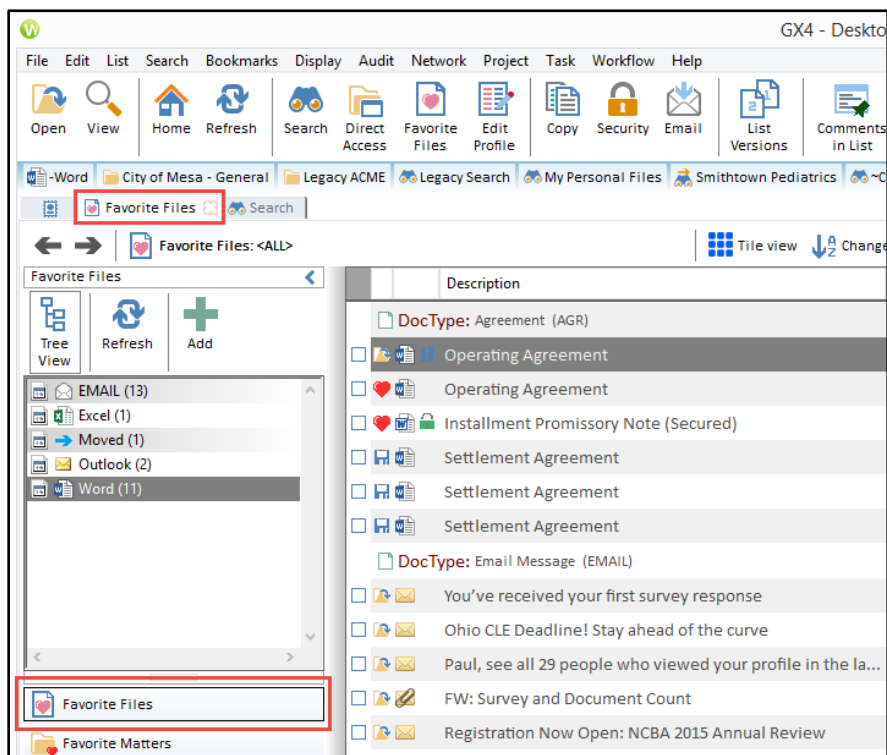


FIGURE 3-1

## Remove Files from Favorites

Open the Favorites list which contains the file or files you want to remove from that list. Select the file(s) to remove in the right-side worklist, then right-click with the file(s) highlighted and select Favorite Files > Remove from the cascading right-click menus. Or, select Favorite Files > Remove on the Edit pull-down menu. If multiple files are selected, Worldox asks you to confirm your choice, in the Clarify Selection dialog.

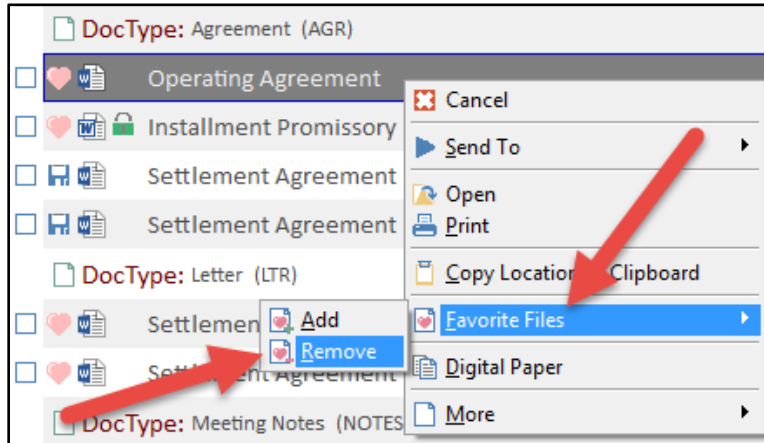


FIGURE 3-2



## Favorite Matters

Adding and removing favorites allows you to access and manage your favorite matters list which follows you across all of your devices. Keeping this list clean allows for easier transitioning between your iPhone, iPad and third party connectors like the Cannon connector. This area can be an important. To remove a favorite matter select the Favorite Matters tab in the navigation pane, browse to the matter to be deleted and right click on it. You can then choose remove from Favorites.

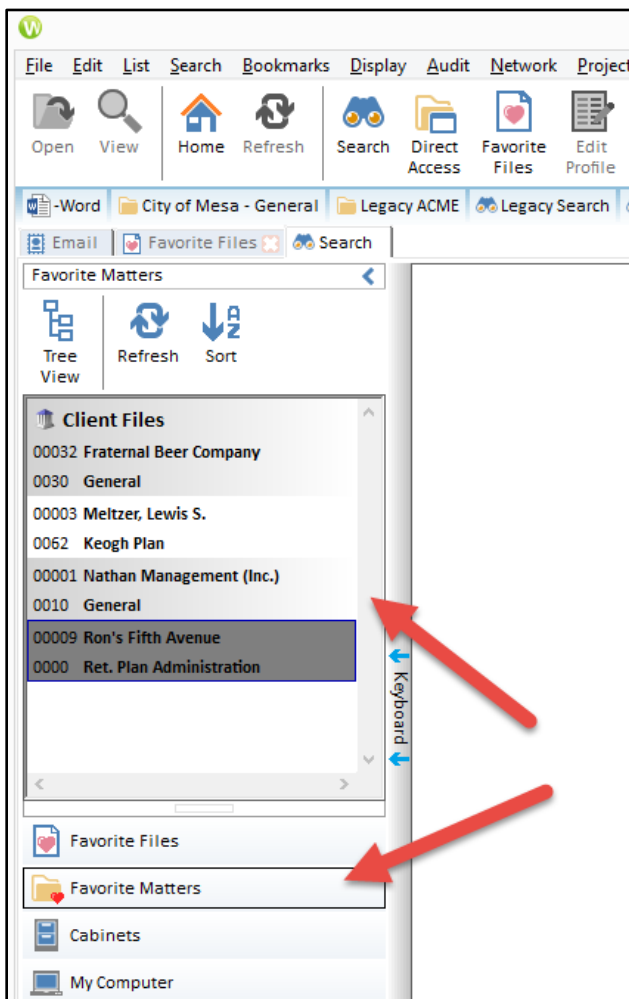


FIGURE 3-3

## Direct Access

Direct Access essentially a way to quickly reach direct folder contents without having to search, or click down through the Cabinets folder tree on the navigation pane.

From the Worldox main window, click **Direct Access** on the toolbar, or select **Direct Access** from the List pull-down menu. That opens the Direct Access form.

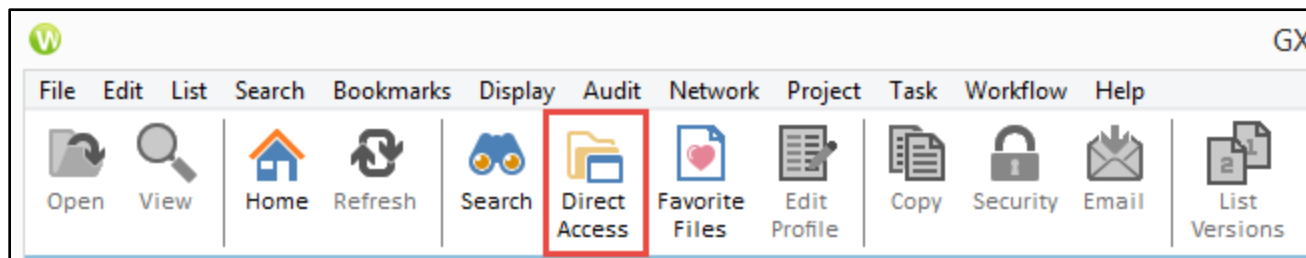


FIGURE 3-4

You can re-select the Cabinets if necessary, by clicking Cabinets. With another group selected, the form reloads and field choices most likely change. Click profile field buttons along the left-hand side to display field lookup tables, so you can select codes or values, or type in codes if you know them.

## Search Templates

On the Worldox main window, click Search in the toolbar. That opens the Select Templates dialog, listing all available search forms (templates). You can select any one of these, either to run that search exactly as it is defined now, or as a starting point to customize a new search.

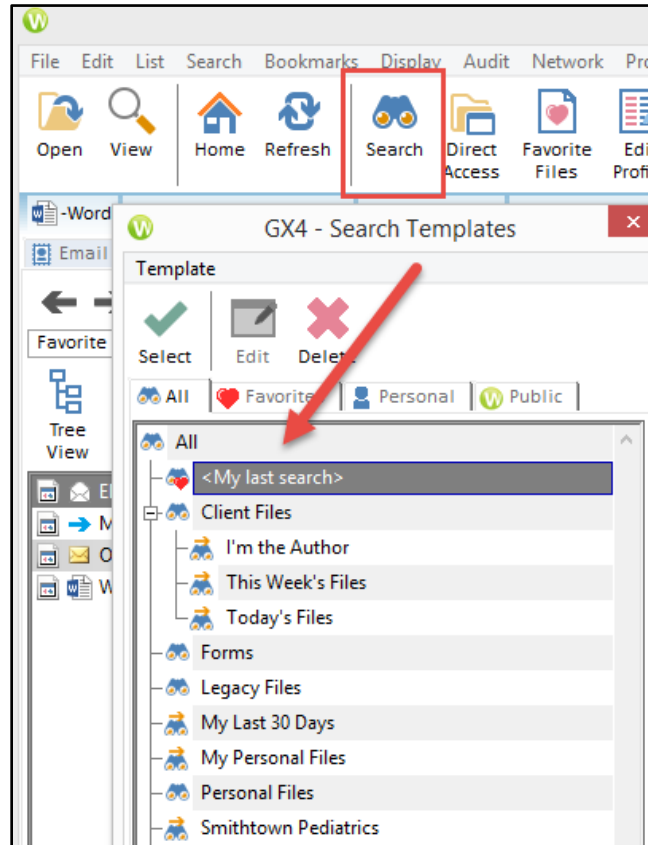


FIGURE 3-5

If one of those instant searches is what you need, go ahead and select it. That starts the search and displays any found files in a work list. Otherwise, click one of the listings to open the Find Files form.



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