

Worldox GX3

*35*45 Consulting Conference*

July 2012

Beyond Management LLC

About this Worldox presentation

Why recommend Worldox to your clients?

Discuss a few feature examples

Discuss Worldox and Outlook

Discuss scanning options

(I'll use comparisons to Time Matters document management)

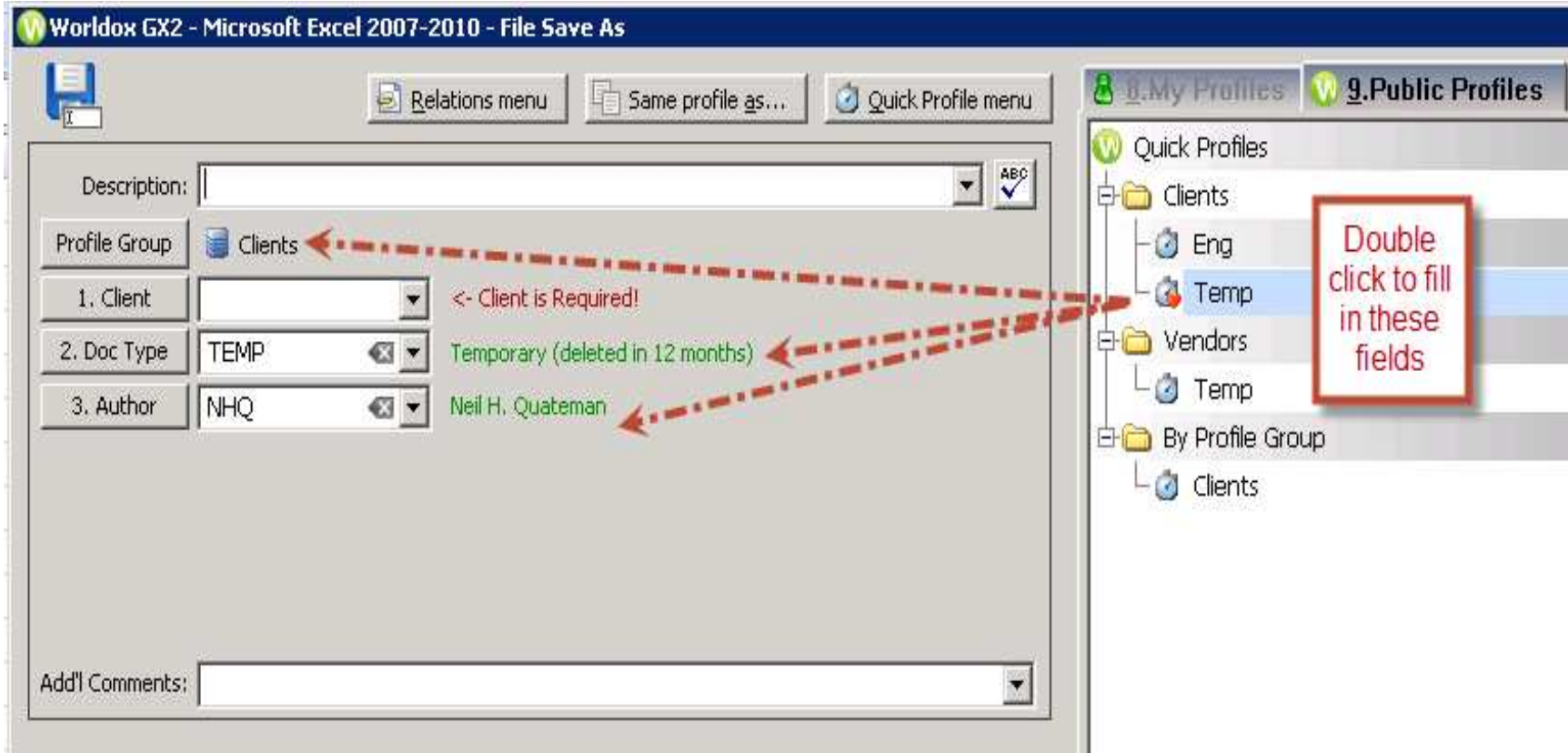
Q&A

Why recommend Worldox to your clients?

- *Speed*
- *Ease of use*
- *Search flexibility (including full text and the body of email messages)*
- *It is possible to index attachments*
- *Excellent version control, with inclusion in footers (e.g., 101234.DOC v2)*
- *Excellent integration with redlining (Workshare and DocsCorp)*
- *Flexible security, including integration with Active Directory*
- *Makes emails available to all members of the firm*
- *Relieves storage burden from the Exchange Server*
- *Stable and mature product, started in the mid eighties*
- *Excellent tech support (except that it has become a callback system)*
- *Very favorable pricing compared to the competition*

Feature Examples

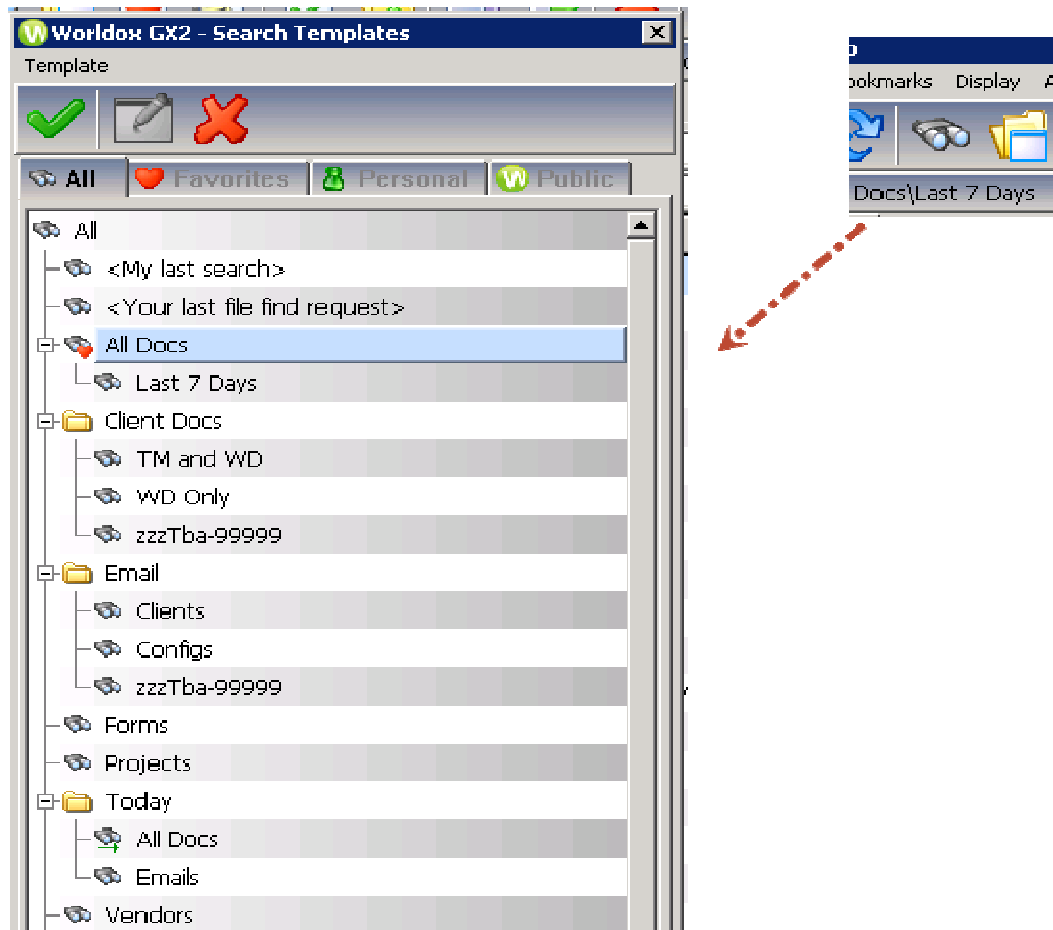
QuickProfiles for reducing time when saving



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Feature Examples

Search templates for reducing setup time for a search



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Feature Examples

Bookmarks for frequently used searches

The screenshot displays the Worldox GX2 Desktop interface. At the top, a menu bar includes File, Edit, List, Search, Bookmarks, Display, Audit, Network, Project, Task, Workflow, and Help. Below the menu is a toolbar with various icons. A red oval highlights a set of bookmark icons: 'All Docs Today', 'All Docs\Last 7 Days', 'All Emails Today', 'Beyond', 'Client Docs\TM and WD', 'Forms', 'Generic TS Prop', and 'Payroll Worksheet'. A red callout bubble points to this group with the text 'A group of documents'. Another red callout bubble points to a single document icon in the list with the text 'A single document'. Below the bookmarks is a navigation pane with 'Email' selected and 'All' as the current view. The main area shows a list of documents with columns for Description, Doc ID, Ver#, Modified, and Client.

	Description	Doc ID	Ver#	Modified	Client
<input type="checkbox"/>	RE: Timeslips 2007 Technical Support for David A. Giannotti, PC	B0071866.MSG		6/25/2012 03:12 PM	zzzTB/
<input type="checkbox"/>	My Report from the Solo Summit	B0071856.MSG		6/25/2012 12:11 PM	State
<input type="checkbox"/>	Pam Wilson's June 4th eMail to LPMT Regarding Proposed Changes to CLE Criteria	B0071855.MSG		6/25/2012 12:36 PM	State
<input type="checkbox"/>	RE: Timeslips 2007 Technical Support David Gianotti	B0071852.MSG		6/25/2012 12:48 PM	zzzTB/
<input type="checkbox"/>	Quote for Law Office of William C. Staley	B0071850.MSG		6/25/2012 12:42 PM	Staley

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Feature Examples

Projects (grouping documents together)

The screenshot displays the Worldox GX2 Desktop interface. The main window shows a project view for 'Timeslips Basic Training'. The left sidebar contains a tree view with 'My Workflows', 'My Workspaces', and 'My Documents'. Under 'My Workspaces', the '<Recent Projects>' folder is expanded, showing several projects, with 'Timeslips Basic Training' selected. The main pane displays a list of documents associated with this project, including training guides, outlines, and checklists.

	Description	Doc ID	Ver #	Modified	Client Desc
<input type="checkbox"/>	Timeslips Remote Archive and Combine	B0065277.DOC		2/9/2012 11:47 AM	BM-Classes
<input type="checkbox"/>	Timeslips Slip Entry Training Outline	B0022065.DOC		7/13/2010 02:18 PM	BM-Classes
<input type="checkbox"/>	Timeslips Slip Entry Training Outline	B0046050.PDF		7/13/2010 02:17 PM	BM-Classes
<input type="checkbox"/>	Timeslips Basic Training Guide PPT	B0026100.PPT		10/20/2008 05:11 PM	BM-Classes
<input type="checkbox"/>	Timeslips Basic Training Guide PDF	B0027916.PDF		10/20/2008 05:06 PM	BM-Classes
<input type="checkbox"/>	Timeslips Basic Training Guide TOC PDF	B0027917.PDF		10/20/2008 05:01 PM	BM-Classes
<input type="checkbox"/>	Things that occur when Approving a TS invoice	B0027172.MSG		8/12/2008 09:46 PM	Sage and Timeslips
<input type="checkbox"/>	Timeslips Rate Levels	B0026160.DOC		8/2/2008 02:45 PM	BM-Classes
<input type="checkbox"/>	Timeslips Implementation Checklist	B0022067.DOC		2/21/2008 11:03 AM	BM-Classes
<input type="checkbox"/>	Timeslips Keyboard Slip Entry Shortcuts	B0046048.PDF		12/9/2004 04:40 PM	BM-Classes

Feature Examples

Workflow [an add-on] (communicating docs among users)

Select a doc, either Create a Workflow, or choose from your templates

Worldox GX2 - Desktop

File Edit List Search Bookmarks Display Audit Network Project Task Workflow Help

Worldox GX2 - Workflow > Templates

Doc ID: B0071759.PDF
Description: Worldox New Install Proposal for Deily Law Firm, APLC

Name	Subject	Question	Route Rules
Payroll approval	Payroll approval	Approve/Reject	SUCCESS if ALL choose Appl
Proposal review	Proposal review	Approve/Reject	SUCCESS if ALL choose Appl
To IRP	For action by IRP	Review/Comment	SUCCESS if ALL choose Revi

R#	User	Full Name	Email Address
1	NHQ	Neil H. Quateman	nquateman@beyondmanagement.com

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Feature Examples

Workflow [an add-on] (communicating docs among users)

The screenshot shows the 'Worldox GX2 - Template > Select' dialog box. At the top, it indicates '1 file Attached:' with a file named 'B0071759.PDF' and a subject 'Worldox New Install Proposal for Dely La'. Below this, there is a 'Workflow' section with a 'Subject' field containing 'Proposal review'. A red box highlights the 'Route #1' section with the text 'Various routing is possible'. The 'Message' field contains 'Please review this proposal'. Below the message, there are three configuration options: 'Question:' set to 'Approve/Reject', 'Route is a:' set to 'SUCCESS if ALL of the recipients choose Approve', and 'Due Date:' set to 'Plus 2 Working Days at 04:00 PM'. A red box highlights these options with the text 'Workflow templates have defaults, but values can be changed'. At the bottom, there is a 'Send to:' section with 'Add User', 'Edit User', and 'Remove User' buttons. Below this is a table with columns 'User', 'Full Name', and 'Due Date'. The table contains one entry: 'NHQ', 'Neil H. Quateman', and 'Plus 2 Working Days at 04:00 PM [Default]'. At the very bottom, there are 'Begin' and 'Cancel' buttons.

Worldox GX2 - Template > Select

1 file Attached:
1 B0071759.PDF Worldox New Install Proposal for Dely La

Workflow Subject: (55 characters remaining)
Proposal review

Route #1 Add

Message: (113 characters remaining)
Please review this proposal

Question: Approve/Reject
Route is a: SUCCESS if ALL of the recipients choose Approve
Due Date: Plus 2 Working Days at 04:00 PM

Send to: Add User Edit User Remove User

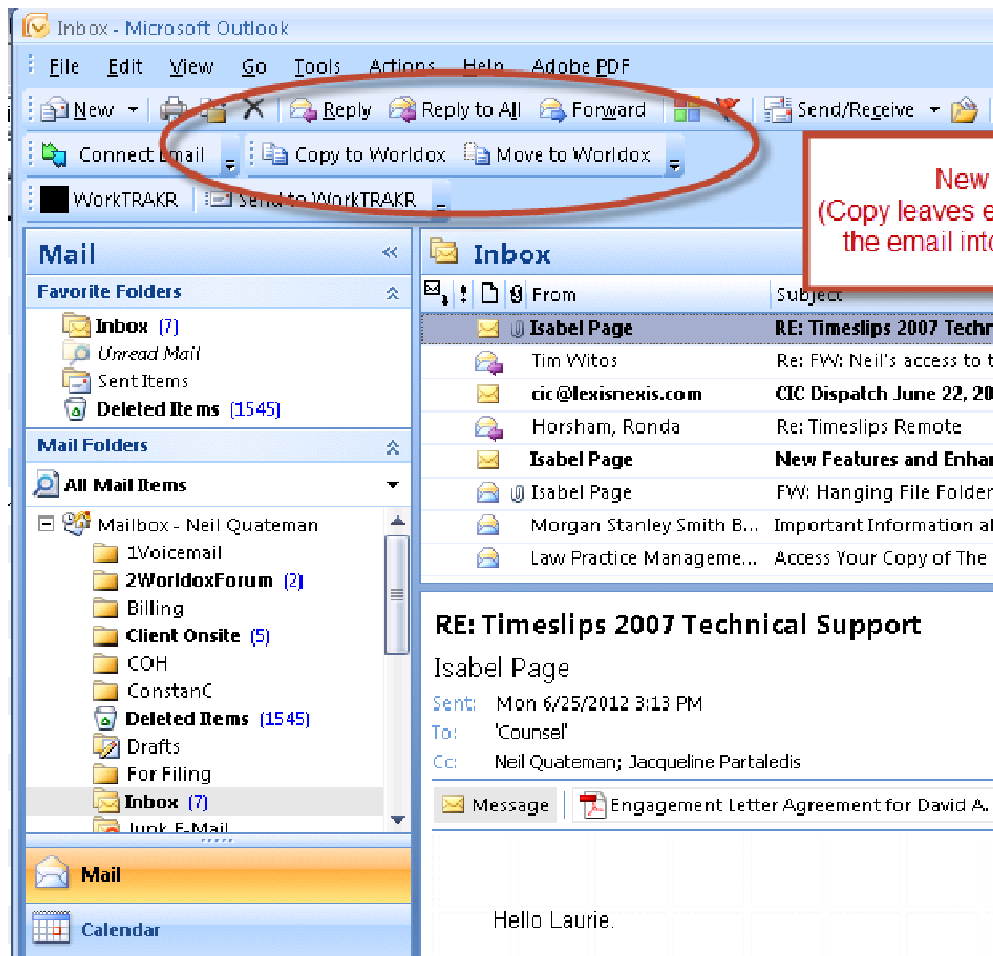
User	Full Name	Due Date
<input type="checkbox"/>	NHQ Neil H. Quateman	Plus 2 Working Days at 04:00 PM [Default]

Begin Cancel

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Feature Example

Worldox and Outlook email (inbound and outbound)

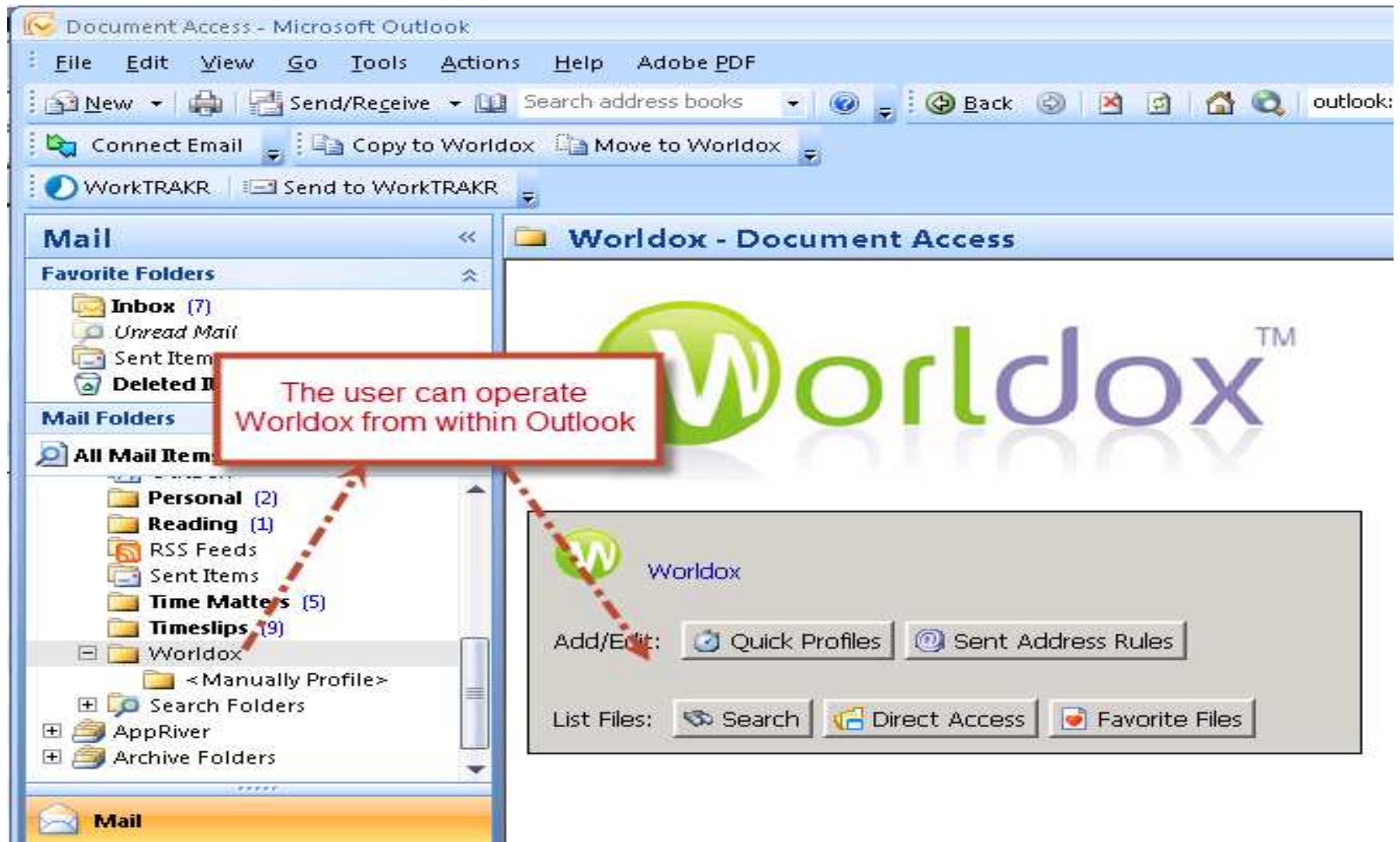


New buttons in Outlook
(Copy leaves email in the inbox, Move puts the email into the Deleted Items folder)

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Feature Example

Worldox and Outlook email (operate Worldox from within Outlook)



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Feature Example

Worldox and Outlook email (operate Worldox from within Outlook)

This is Outlook.

Worldox - Document Access

File Edit List Search Bookmarks Display Audit Network Project Workflow Help

Find: Doc ID=*.xls or *.xlsx ... New List

Location: Find: Doc ID=*.xls or *.xlsx, Client=11782; Profile Group=Clients <Active>

Filter: All Files (*.*)

	Description	Doc ID	Ver #	Modified	Client Desc	Doc Type
<input type="checkbox"/>	Sage Analysis Final Neil a...	B007183...		6/25/2012 10:55 AM	35-45-C	TEMP
<input type="checkbox"/>	Quotation template for ...	B006805...		4/5/2012 05:14 PM	35-45-C	FORMS
<input type="checkbox"/>	Worldox implementation...	B005378...		4/30/2011 01:47 PM	35-45-C	PROC

After doing a Worldox search, the results appear within Outlook.
This is Worldox.

Scanning options

- *Scan to a folder*
 - *Use a bookmark to open the folder*
 - *Then use the Worldox copy or move commands, or the WorkZone*
- *Fujitsu ScanSnap S1500 integration, no extra software purchase*
 - *The user touches a button to start the scan*
 - *A Worldox profile screen appears on the user's screen*
- *Symphony Suite (3rd party add-on)*
 - *A user completes a Worldox profile, and receives a bar code*
 - *Bar codes allow scanning of a batch of documents*
 - *OCR in the background with intelligent queuing*
 - *No additional Worldox license is required*
- *eCopy Connector (3rd party, requires additional hardware and software and Worldox license)*