

Administrator Training

Worldox GX²



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Edit Profile for Multiple Documents at Once

There are circumstances where you may wish to make the same change to a profile for multiple documents. For example, you may want to locate all pending documents and change the status to complete.

- Run a Worldox search for the field value you wish to change (e.g., Account Cabinet, status = pending)
- Select the files you wish to edit by clicking in the box next to each file you wish to edit. To select all files in the search results screen, click Ctrl+ A

TIP: Alt+Ctrl+A will deselect all files

- Click the Edit Profile button
- Change the old field value to what you would now like it to be (in the example to the right, we are changing the status field from “Pending” to “Complete”)
- ****IMPORTANT**** leave the “*” in each field where you want the field value to remain the same
- Click “OK”



Worldox - Edit > Profile...

3 files selected:
Click here to review list

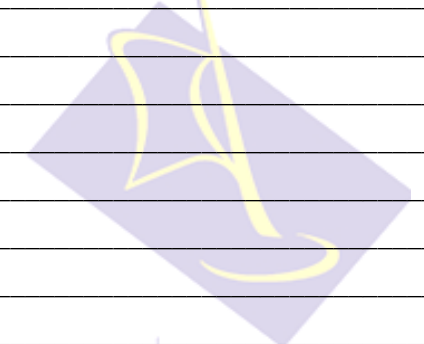
Cabinet: Client\Client

1. Client	*	Copy field from source file.
2. Status	COMPLETE	Completed
3. Category	*	Copy field from source file.
4. Doc Type	*	Copy field from source file.
5. Doc Date	*	Copy field from source file.
6. Filed By	*	Copy field from source file.

Add Comments: _____

OK Cancel

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Edit an Account Number

- In Worldox, perform a search for all documents relating to the account that needs to be edited
- Select all documents pertaining to the account (Ctrl+A will select All documents in a search results list)

	Description	Client Desc	Status Desc	Doc Type	Doc Type Desc	Client	AcctNo
✓	Application	Clark, Candace	Pending	APP	Applications	CLARCA1	SCHPENDING
✓	Ck# 987 \$5,000.00	Clark, Candace	Pending	CHECK	Checks to be In...	CLARCA1	SCHPENDING
✓	Transfer Form	Clark, Candace	Pending	TRANSFER	Transfer Forms	CLARCA1	SCHPENDING

- Select the Edit Profile button



- Click on client field and select the appropriate client

Note: You must select the client in order to display the account numbers linked to that client.

- Click on the Account Number field

- Select the Edit button and edit the account code and description as appropriate. Click “OK”



Worldox - Field > Edit: AcctNo

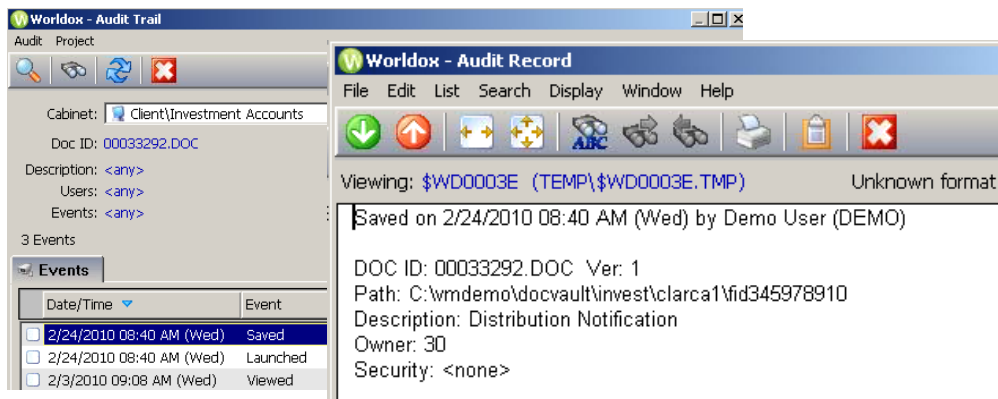
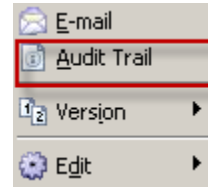
Code	Description
Client: CLARCA1	Clark, Candace
AcctNo: SCH78945612	78945612 Candace Clark Roth IRA Schwabl

Example: If the account number was pending, replace the word PENDING in the code and description with the true account number. Use the first 8 digits of the account number in the code and the full account number in the description.

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Audit Trail – View Document Activity

- To view the activity on a specific file:
 - Right-click on the desired file and select “Audit Trail”
 - The Worldox – Audit Trail History window will appear and immediately start to scan and process the activity that has occurred on this specific file – this includes saves, launches, if the document was renamed or restored, added to, copied, checked-out, edited, etc.
 - Double click on any entry to get specific details about the action of that entry

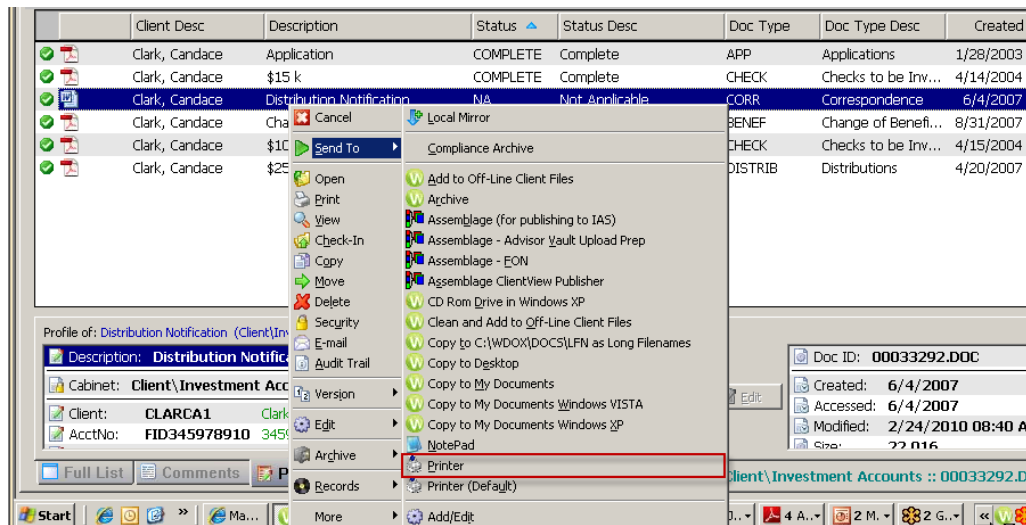


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Print Multiple Files from Worldox

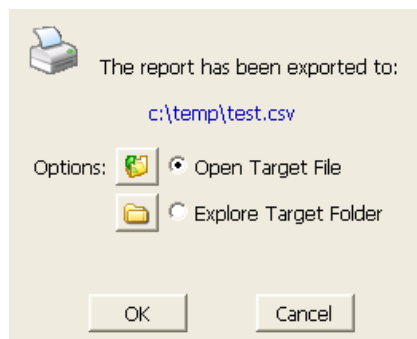
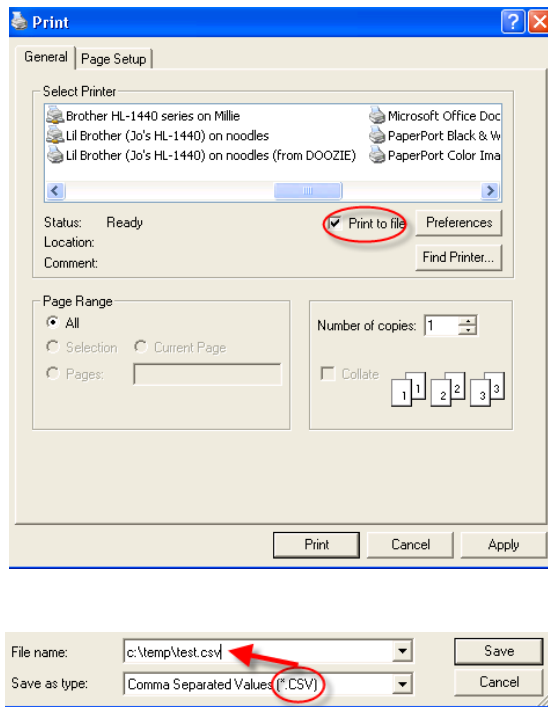
- Perform a search for multiple documents you would like to print at one time
- Select all (Ctrl+A) or click the check boxes for the documents you would like to print
- Right-click on one of the highlighted documents and choose Send To > Printer
- Confirm the selection and select “Continue”
- Select your desired print options and select “OK” to print



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Print a List – Create an Index of Your Files

- Perform a search for a set of documents for you would like to create an index or print the search results list
- Load a Column Template that captures the most information for the set of documents on your current search results screen or insert new columns
- From the main menu, choose List > Print...
- From the Print window, check the Print to file checkbox and select "Print" if you would like to export the list to Excel. To print to paper, select the appropriate printer setting and click "Print"
- If you chose to print to file, when you name the file be sure to keep the file extension as .CSV and select the path in Windows to which you wish to save the file
- Select "Open Target File" to open the list in Excel

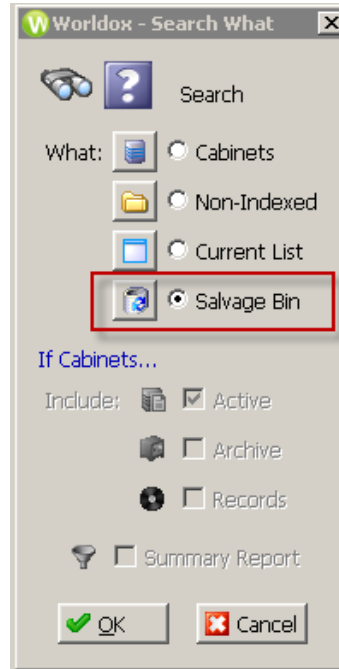


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Restore Deleted Files

Note: To restore a deleted file, the user that deleted the file must have selected the “Move to Salvage Bin” option when she or he deleted the file. If “Delete” or “Shred” options were selected, you will need to restore the file from back up.

- To restore a file from the Salvage Bin:
 - Select the New Search button
 - Enter the criteria you would use to search for the document
 - Select the “Search What” button at the bottom of the New Search window
 - Select the Salvage Bin radio button and click “OK”
 - Back in the New Search window, select “Search”
 - Highlight the file you’d like to undelete and select the Undelete File icon in the upper left hand corner of the Worldox application



IMPORTANT: As soon as you restore the file, don't forget to close the Undelete search tab by selecting the close button on the corner of the tab. If you do not close the Undelete tab, you may inadvertently execute searches against the salvage bin and not find any of the files you want (because you are instructing Worldox to look in the salvage bin).

Notes _____

- Private – ensures only the owner can find or see the file in their Worldox File List

TIP: Another way to ensure sensitive documents are protected is to password protect it.

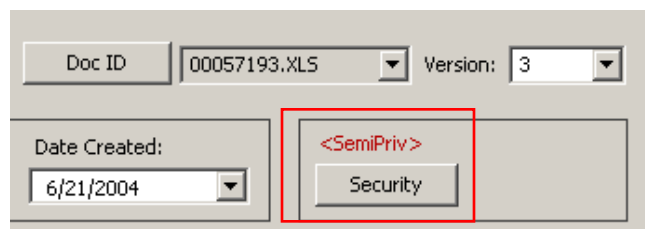
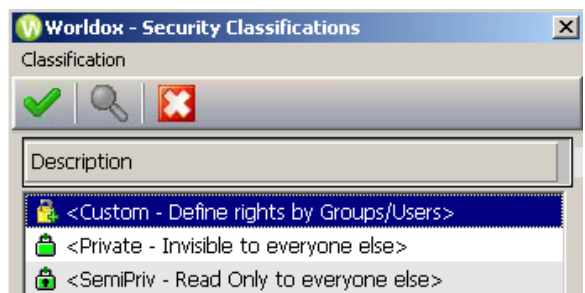
- SemiPrivate – allows other users to see the document and to view it, but they are prevented from making changes; only the owner can do that

TIP: SemiPrivate is great to use with templates. This ensures that no user except the owner can make changes. It will be read-only for all other users.

- Once security is set, a lock icon will appear by the application icon column in the Worldox search window

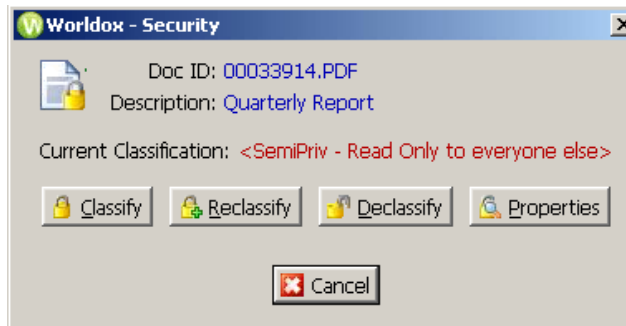
- A green lock means the user has access
- A yellow lock means the user has partial access
- A red lock means the user can find the document, but has no access

Note: You can also set file level security when saving a file or when editing a document's profile.



Notes

- To change security classifications:
 - Select the desired file, then select File > Security from the toolbar
 - Select “Classify” to assign; “Reclassify” to change; “Declassify” to remove; or “Properties” to view the properties of a file’s security



*****IMPORTANT NOTE***:** Users with Worldox Manager Rights will always have full permissions to view / edit documents. As with any software application, with enough knowledge of the system, someone may be able to work around security privileges to view documents. You have the ability to create multiple levels of security both via Worldox and at the network level. Consult with Trumpet and/or your network administrator to obtain the desired level of security for your files you would like.

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Launch the Worldox Admin Program

- Open Windows Explorer
- Navigate to the drive on your network where Worldox is installed and select the Worldox folder
- Scroll down until you see an application called WAdmin.exe. Run the WAdmin.exe program by double clicking on the icon. If it is password protected, enter your password



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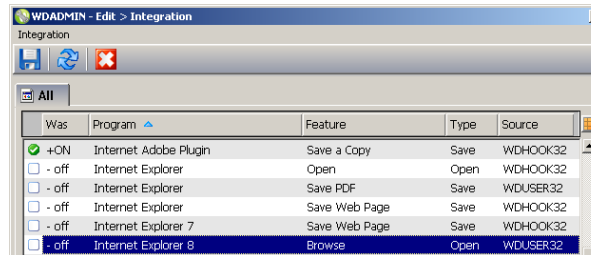
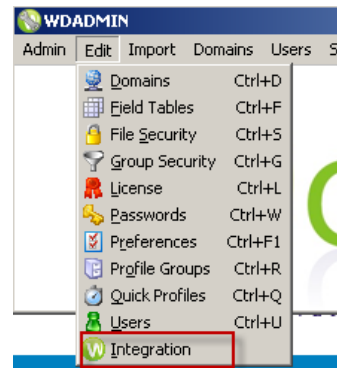


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Worldox Integration With Other Applications

- From the main WAdmin menu, select Edit > Integration
- In the WDADMIN – Edit > Integration window, locate the program with which you wish to integrate Worldox
- Select the checkbox next to the program (there might be more than one type of integration. Select all the features you wish to enable)
- Select the disk icon to save. This will change the Off in the “Was” column to On
- Close Worldox completely (from the system tray by the clock) and re-launch for the changes to take affect on each workstation

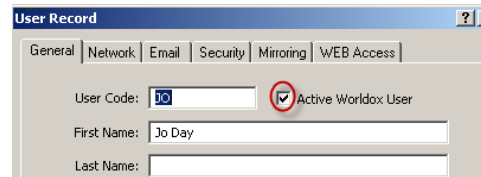
Note: If the application you wish to integrate with does not appear in the list, send an email to support@trumpetinc.com.



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New Employee or Worldox User Set Up

- Use the WAdmin program to add or edit a user in Worldox. The WAdmin program is located in your Worldox application folder (Refer to the section, *Launch the Worldox Admin Program* for further instructions)
- From the main WAdmin menu, select Users > Add/Edit
- From WAdmin – User List window, click the green plus button to add a new user
- Enter the desired Worldox user code in the User Record window. If possible, the user code should be the same as the user’s Windows login name



Note: Under the Network tab, an alias can be used to specify the Windows login if it is different from the Worldox user code. This will allow the user to open Worldox on his or her workstation without entering his or her Worldox user code each time.

- Enter the user’s full name in the First Name line to display as “Jo Day”. Enter the first and last name as separate lines to display as “Day, Jo.”
- Do **not** select the Worldox Manager checkbox
- User Initials should be unique
- Click “Apply” to save changes

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- If you have Worldox security configured, the user must also be added as a member of the applicable security groups. The new user will not have access to any cabinets until they are added to the correct security group. Refer to the section, *Adding a User to a Security Group* for instructions on adding the user to a security group

- If you wish to give the user the ability to add and edit fields, create global templates, etc., the user must be added as a member of the Power Users Security group. Refer to the section, *Adding a User to a Security Group* for instructions on adding the user to a security group

Note: If you do not have a Power Users security group, and you wish to add to give the user the ability to add and edit fields, create global templates, etc., you will make them a Worldox Manager by checking the “Worldox Manager” checkbox from the User Record window in the Users > Add/Edit window.

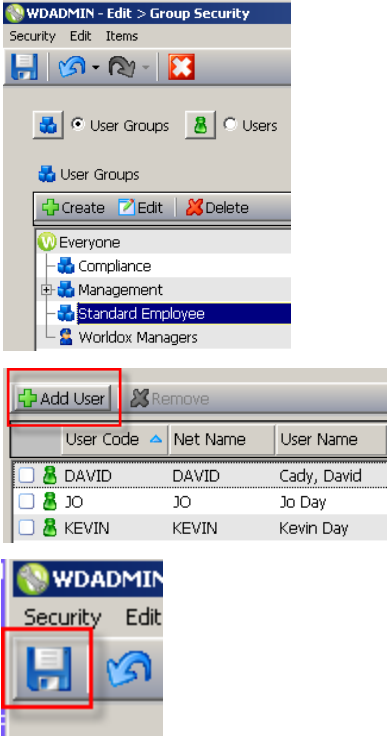
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Adding a User to a Security Group

- Open the WAdmin program and select Security > Groups
- From the left-hand window pane, single click on the security group to which you would like to add the user
- From the right-hand window pane, select “Add User”
- Select the appropriate user(s) and click the green check mark
- Click the Save icon



Note: When you feel it is appropriate to apply security settings to specific groups of files, contact Trumpet to configure security (billed hourly). Security set up typically happens in conjunction with Trumpet installing practice management filing cabinets (e.g., personnel, accounting, compliance, etc.).

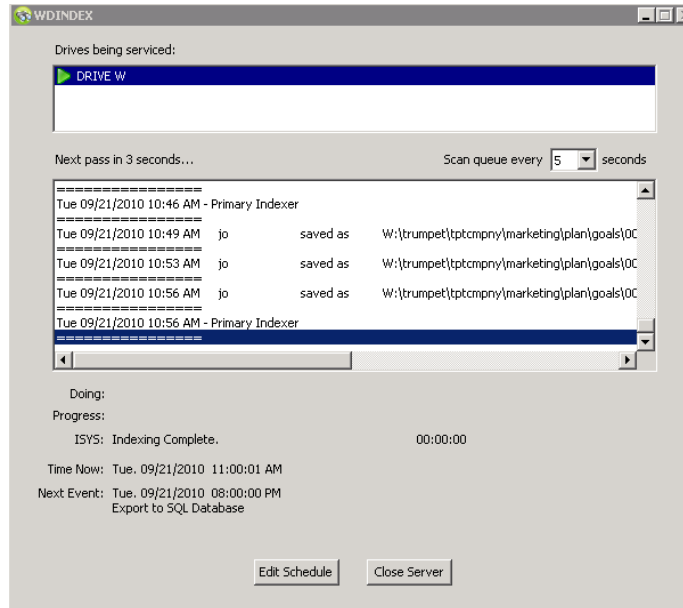
We strongly recommend that you arrange for Trumpet to configure your initial security settings. Please note that Trumpet does not support security configurations that were not created by Trumpet.

Notes _____

The Indexer

- Indexer Software vs. Indexer Machine

- Indexer Machine – The indexer machine is simply a workstation that should be logged on continuously (24 hours per day 7 days per week). It's job is be logged on for the various software applications that your firm uses.
- Indexer Software – The indexer software (“WDINDEX”) is one of the programs that run on the “Indexer Machine”. It keeps the Worldox indexes up to date. The indexer software does a nightly rebuild to update the profile information and the text information for text in file searching. It doesn't actually *store* any documents. It's job is to connect to the server location where your documents are stored and look for what has been added and what has changed. This keeps the “indexes” updated so that you can search quickly. See blow for a screenshot of the indexer software.



- If you are experiencing issues with the indexer machine itself, it's best to get your System Administrator involved. If you are experiencing issues with the WDIINDEX indexer software, you should contact Trumpet

Notes _____

Symphony OCR (optional)

- Symphony OCR also runs on the indexer machine. Symphony is Optical Character Recognition (OCR) software. Its job is to analyze PDF documents and convert them to image + text PDFs. This allows the documents to be text searchable.
- For detailed information on Symphony OCR, please refer to the Symphony OCR Manual:
http://www.trumpetinc.com/Downloads/symphony/socr_administration_guide.pdf

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Symphony Profiler (optional)

- The Symphony Profiler Processor also runs on the indexer machine. It's responsible for taking Worldox file reservations and matching them up with documents that have been scanned into an input folder for filing to Worldox.
- To reference the Symphony Profiler User Guide, right click on the Symphony Profiler Workstation icon in the system tray and choose "User Guides".

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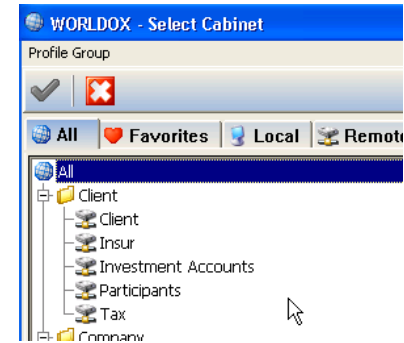
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Reference Material Section

Document Templates

Special Handling for Word & Excel Templates

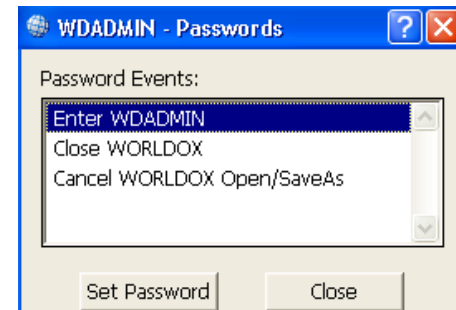
- In order to save Word or Excel templates with an extension of .dot or .xlt:
 - Save the document to your desktop
 - From your desktop, drag and drop the document into the WorkZone
 - This will open the Worldox – WorkZone window. Select the appropriate Cabinet
 - The Worldox - File Save window will appear. Complete the index card and click “OK”



Password Protect the WORLDOX Administrative Program

The WAdmin program can be password protected. Since it is possible to make changes to the functionality of the whole system, a password can be set to prevent unauthorized access to the program. If you decide to password protect your program, please advise Trumpet of your password for back up and support reasons.

- In WAdmin, Select Edit > Passwords
- Select which event(s) you would like to require a password
- Select “Set Password”
- Enter a password and confirm it



Worldox Maintenance – Back Up

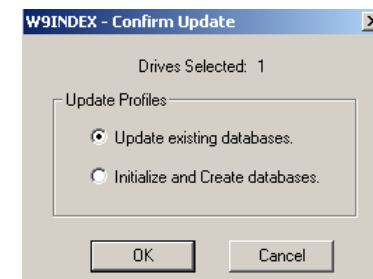
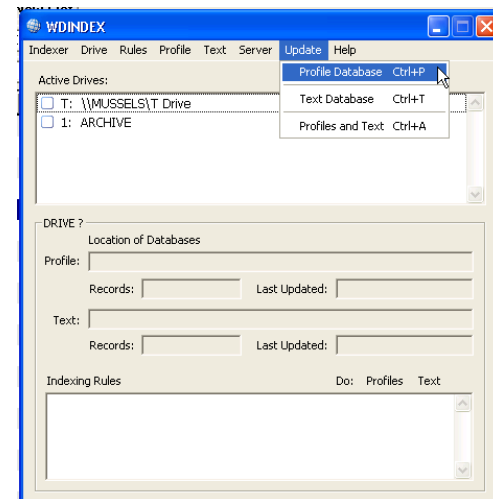
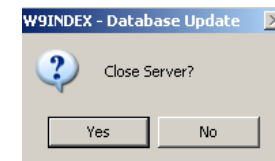
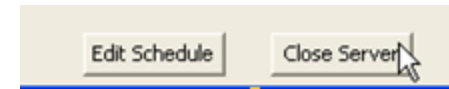
Confirm with your system administrator that the Worldox program and the DocVault are backed up daily as indicated in the Worldox configuration instructions provided by Trumpet. Per Worldox, the Indexer should not be backed up to avoid possible read/write conflicts.

First and foremost, for the protection of all your data, you should check the tape back up system ***each workday morning*** for any error messages. If you see any error messages, contact your network administrator immediately. Error messages may be indicative of something that can be fixed easily or a more serious matter, such as a drive that is beginning to fail. In either case, you do not want to delay correcting the problem. As a general rule, you should periodically attempt to restore a file from a back up tape to double-check the reliability of your back up system.

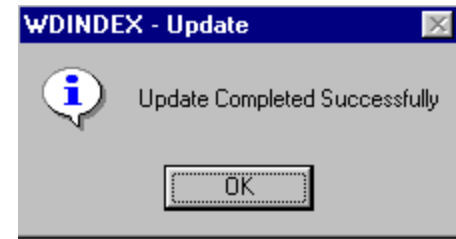
Rebuild and Initialize the Profile and Text Databases

If restarting the indexer does not enable you to retrieve your document, then manually re-index the Worldox databases by performing the following steps:

- Go to the indexer. If the indexer screen does not appear, open the window by clicking on the WDINDEX button
- Select the Close Server button
- Select “Yes” to the next dialogue box to terminate the index server
- In the WDIndex main menu, **first** select the drive where the DocVault resides
- Next, select Update > Profile Database
- Select “Update Existing Databases”
- Select all of the checkboxes in the Update Options and select “OK”

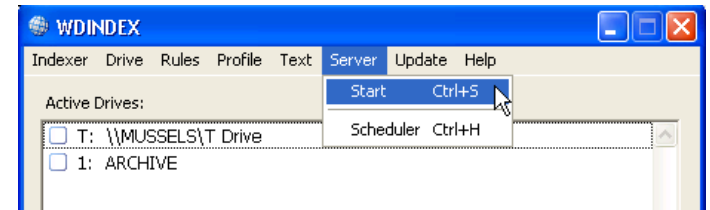


- The indexer will then begin to re-index the databases. Check on it periodically. When it is finished, the indexer will show a message that the update was completed successfully. If the update was completed successfully, select “OK”. If there were any problems during the re-indexing process, an error message(s) will appear on the screen. Copy down the error messages and notify either your system administrator or call Trumpet for resolution.



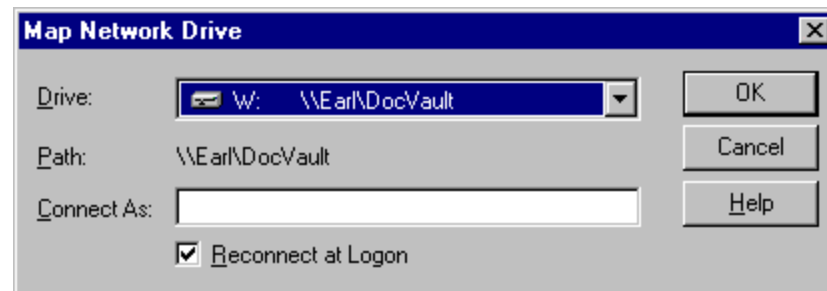
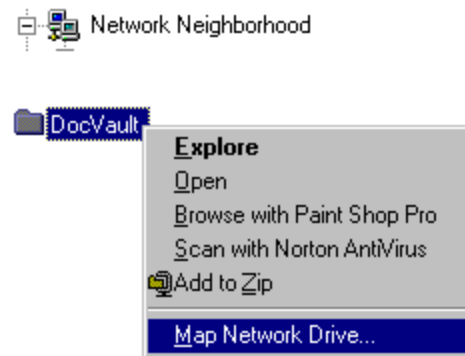
Note: It may take 10 minutes to an hour to re-index depending on the number of files in the database.

- Next, from the menu, select Server > Start. This will restart the indexer



Re-map the Docvault

- To remap the drive, open Windows Explorer and navigate to Network Neighborhood. Select the server name where the DocVault resides. Information about where the DocVault resides on your system is contained in your MyDMS document
- Right-click on the DocVault folder and select “Map Network Drive.” In the drive field, use the scroll arrow to select the drive letter to which the DocVault should be mapped
- Select “OK”



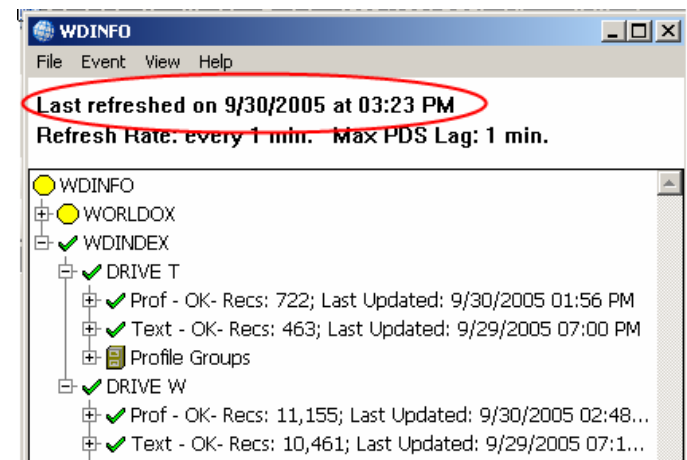
Re-map the Worldox Application Network Directory

- If you need to re-map the drive where the Worldox application resides (versus the Worldox docvault), open Windows Explorer and navigate to Network Neighborhood. Select the server name where your network applications reside (Information about where the Worldox program is installed is contained in your MyDMS document)
- Right-click on the folder that contains network applications and select “Map Network Drive.” In the drive field, use the scroll arrow to select the drive letter Worldox should be mapped to and select “OK”

WD Info

- WD Info is an alerts program that can be installed to specific users' workstations. To find out which workstations receive WD Info alerts, consult your MyDMS document. The purpose of the WD Info program is to ensure the smooth operation of document retrieval by alerting specific users in the office if there is problem with their Indexer program that they need to address.
- The WD Info icon is located in the lower right hand corner of your workstation. If WD Info has an alert about the Indexer, this icon will change to yellow or to red, depending on the nature of the problem.
- To check the status of the alert, right click on the WD Info icon and select "Show Detail"
- If WORLDOX has a yellow or red status,
 - Simply right-click on it and select ignore
 - Click the plus sign to expand the details. Your Worldox docvault (where your documents are stored) is located on a network drive (e.g., Not your C or D drive)
 - Select the plus sign next to the network drive where Worldox is installed. You will see the status of both of Worldox's indexes – the Profile index and the Text index
 - Read the status of the Profile Index. If there is a backlog as indicated below, then you need to go to the indexer computer to troubleshoot

Note: The text index rebuilds each night, so the last updated time and date should be within 24 hours.



Troubleshooting the Indexer

Typically, you will know whether the indexer is down if you are someone who has WD Info installed on your computer and you receive a yellow or red WD Info Alert. Another indication of when to check the indexer is if a user cannot locate a file, particularly one he or she just filed.

- If your firm shares a single monitor between your file server computer and your indexer computer, confirm that you are viewing the indexer's screen (not the file server's screen) by looking at the toggle switch on the computer
- Due to the intensity of the rebuilding process each night, the indexer sometimes will not take time out to refresh the screen. When this happens, the Time Now readout may not match the system clock and the screen may appear "frozen." Also, portions of the Indexer screen (if temporarily overlaid by windows from other programs), may not bother to redraw. In short, if the program looks dead as described above, follow these steps:
 - Check the hard drive disk light on the Indexer. If the light is blinking randomly, then the indexer is probably working properly. In this case, give the indexer more time to complete its operation and check it again in 5 to 15 minutes (If this occurs during normal business hours, this may mean that the indexer does not have enough time to complete its rebuilding routine and it may be necessary to adjust the schedule for the indexer)
 - If you can minimize the Index window – even if it comes back "blank" when you maximize it – this is an indicator that the Indexer is still functioning. Again, give the indexer more time to complete its operation and check it again in 5 to 15 minutes. If step 1 and 2 do not work, then continue with the next 3 troubleshooting steps
 - Is the hard drive disk light either continuously off or on (meaning not blinking)? If either case, go to the next step
 - Check to see if the Time Now readout and the system clock (the latter is typically located in the bottom right hand corner of the screen) read the same time **AND** that they are both frozen at an incorrect time. If yes, go to the next step
- Just when do you "give up" and deem the indexer to be down? The best advice is to be patient as what you do *not* want to do is manually interrupt a build process that is performing correctly. In the case of an overnight text build, for example, users can still perform searches on the network copy of the index from the day before. Initially, at least, overcompensate by giving the indexer more time to finish its rebuild. After a few troubleshooting sessions with the indexer, experience will dictate when to wait longer and when to restart the indexer.

- If there are error messages on the indexer:
 - Take screen captures of any error messages (Note: To take screen captures, Word must be installed on the Indexer. To take screen captures, select Alt+Print Screen, then open Word and select Ctrl+V to paste the screen capture; do this for all error messages then save this Word file. If you do not have Word installed, use WordPad (Start > All Programs > Accessories > WordPad)). If you can not get the screen shot, copy down the error messages verbatim, including the title of the dialog box displaying the error
 - Call Trumpet or send us an email of the screenshot
 - If you wish, you can also try restarting the indexer and/or rebuilding and initializing the profile and text database. If you continue to have problems with the indexer, be sure to communicate them to Trumpet

- Restart the Indexer
 - Go to the indexer. If your firm shares a single monitor between your file server computer and your indexer computer, confirm that you are viewing the indexer's screen (not the file server's screen) by looking at the toggle switch on the computer
 - Double click on the Worldox Index Server icon located on the Indexer's desktop screen
 - If this does not restart the indexer, then:
 - Select the Start button at the bottom left hand corner of the screen
 - Select Shutdown > Restart the Computer > and click "Yes"
 - If this does not restart the indexer, then:
 - Turn the indexer off and then on again

****Warning** Make certain you are turning off the indexer machine, not the company's file server!**