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Worldox GX²

Delivers: New tools, a new look – a big step forward in power and ease-of-use for this classic document management solution.

GX² continues the evolution:

Many new features and enhancements… it simplifies daily tasks, customizing powerful software capabilities to your personal preferences and workstyles.

Coming Soon! Worldox GX² is yours at *no extra charge* with maintenance renewals.

Focus, access

- A seamless Outlook/Worldox interface, so you can work in one application, not two.
- Customizable path tree listings: instant access to groups and bookmarks.
- Views – so you can see updated search results on demand without searching.
- Favorites (most used/recent items) to take the remembering out of field table input.

Visual tools

- Preview three documents at once.
- "Cloud" filters: a visual approach to viewing and filtering work lists.
- New path-tree folder text labels, appearing full-size on demand.

New ways to share

My WorkSpaces – a new way to share projects and files, an alternate way to create and manage projects.
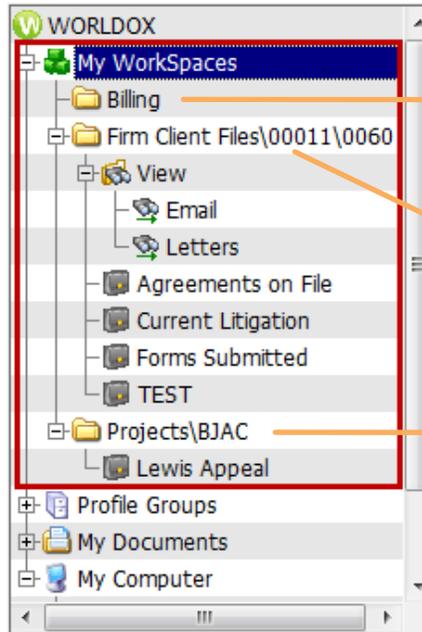

	Description	Doc ID	Modified
	DVComparison: Org=00000159.DOC;1 vs. Mod=00000162...	00000374.DOC	3/29/2006
	Worldox GX Maintenance announcement	00000315.DOC	3/16/2006
	Anheuser-Busch Companies, Inc.	00006900.PDF	3/15/2006
	Employee Stock Purchase Plan - JetBlue Airways Corp.	00000162.DOC	1/29/2006
	Indemnification Agreement - JetBlue Airways Corp.	00000161.DOC	1/18/2006
	In-Flight Entertainment System Agreement - JetBlue Airwa...	00000163.DOC	1/18/2006
	CERTIFICATE OF INCORPORATION	00000164.DOC	1/18/2006
	Airbus A320 Purchase Agreement - AVSA SARL and New ...	00000166.DOC	1/18/2006
	Aircraft Maintenance and Modification Services Agreement - J	00000165.DOC	1/18/2006

PLUS *automatic word matching, configurable Send To menu access, tabs... so many helpful shortcuts to make your job easier.*

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Big Steps:
The two most notable changes in GX² are the new My WorkSpaces zone and Worldox through Outlook access.

My Workspaces

There's something new in the left-side path tree. My WorkSpaces is different – a configurable zone, completely under your control. Use it to create "visual bookmarks" to key work items – to bookmarked folders, "sharable" profile group shortcuts and to pre-set, filtered lists (Views) available for those groups – whatever you want to see all the time and need access to quickly. WorkSpaces are also powerful tools for organizing and sharing information with colleagues and team members.

WORLDOX
- My WorkSpaces
  - Billing
  - Firm Client Files\00011\0060
    - View
      - Email
      - Letters
    - Agreements on File
    - Current Litigation
    - Forms Submitted
    - TEST
  - Projects\BJAC
    - Lewis Appeal
- Profile Groups
- My Documents
- My Computer

A bookmark, "subscribed" to, so that it displays in the My WorkSpaces zone.

Shortcut to a profile group, also subscribed to. Views exist for this group, and projects are within it; these display automatically.

Another profile group, this one created to hold just projects. The subscribed shortcut links to one user's projects.

Cloud Filters

A new Cloud tab now appears on the tab row beneath work lists. Cloud filtering is visual, compared to other types of filters. It lets you see at a glance how profile field values and related items (such as doc type) are distributed in a list. It does not replace standard filters, but rather gives you a more visual alternative for filter-setting.

	Description	Doc Type	Modified	Owner
	Updated Correspondence	CONTRACT	3/21/2007 04:22 PM	ANTHOI
	BRIDGE CREDIT AGREEMENT (00000845)	ADF	3/16/2007 09:42 AM	ANTHOI
	364-DAY REVOLVING CREDIT AND TERM LOAN ...	ADF	3/15/2007 12:26 PM	ANTHOI
	Follow up	ADF	3/9/2007 05:37 PM	ANTHOI
	Manage Integration		3/9/2007 05:19 PM	ANTHOI
	Law Products		3/9/2007 05:12 PM	ANTHOI
	ASSET PURCHASE AGREEMENT (00000792-2)	ADF	2/22/2007 12:04 PM	ANTHOI

Filter List   Min 2 Files   Uncheck All

94 x Outlook Item

Type: * *.CSV *.DOC *.DOCX *.GIF *.HTM *.JPG *.MSG *.PDF *.RTF
*.TIF *.WDF *.WDM *.WDN *.XLS *.XLSX *.ZIP

#1: Client/Level 1: 10001 10002 12589 12589-1 12369 2324 300
30035 30129 30136 7 99000 BDMO FREE PHA RD SM
TSS1

#2: Matter/Level 2: 00005 0005 0011 0101 0111 1 12478 171 41521
9777 ABFGGKL AT CRC GLOBAL ID MT TES TES1 TST2

Full List Comments Profile Preview Relations Project Cloud   EST Lib=<Unassign File: 1 of 172

Worklist files

"Include", "Exclude" symbols

Doc types and fields found on the list

Larger type = more on the list relative to other items

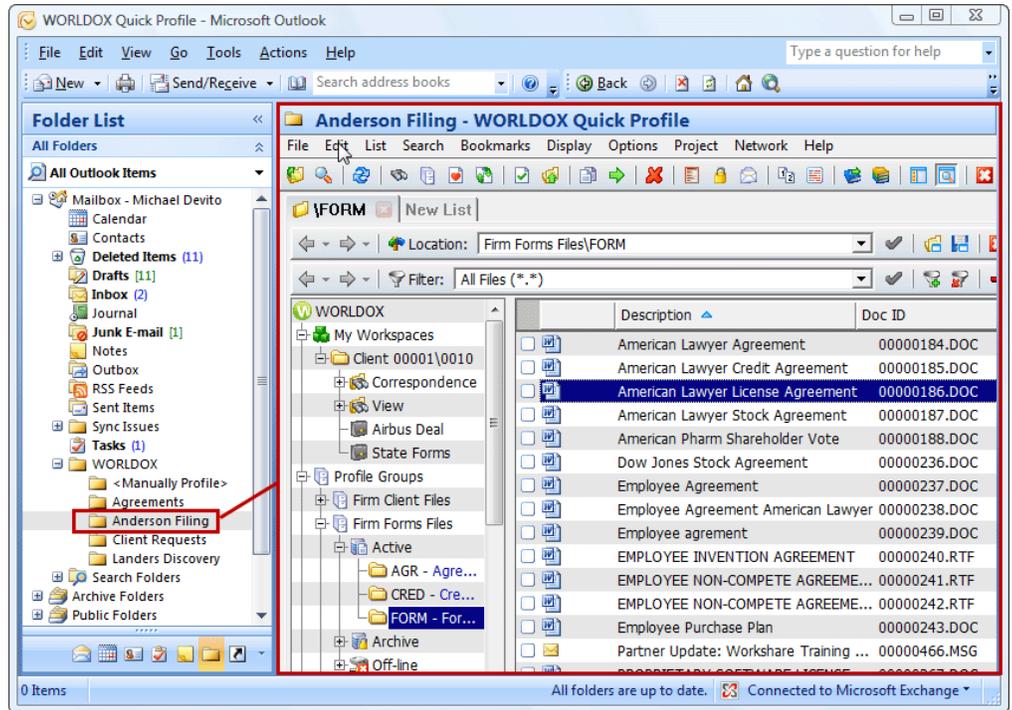*Mouse-over to see a checkbox and # of appearances on list*

New tab in GX²

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Worldox in Outlook

The Worldox / MS Outlook connection – already strong with drop folders and action buttons – is much stronger in GX².
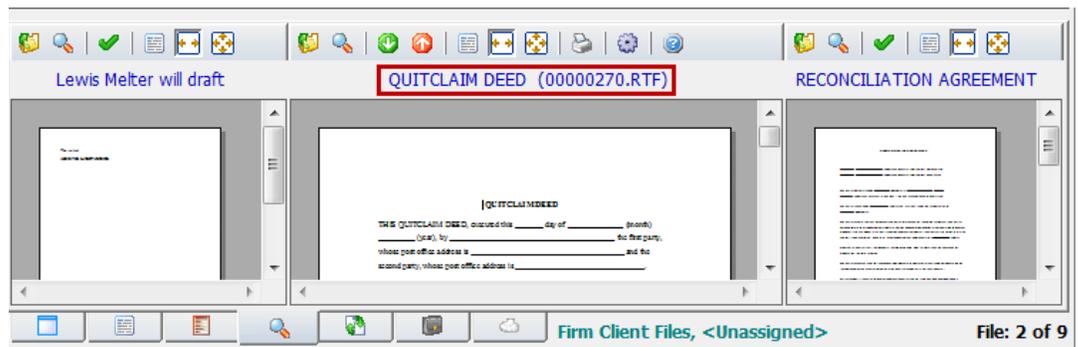
In GX, that connection stopped short of combining applications. The programs remained separate. You had to toggle back and forth to move between them.

Toggling is no longer necessary. In GX², Outlook drop folders can "port" Worldox into the right-side frame of the Outlook window. It's an optional capability. One simple setting is all it takes to create a seamless interface – two applications in one window.

Multiple document previewing

The Preview tab now shows up to three panes. It's completely customizable. Resizing the middle pane affects all three. You can set it to show just the middle (selected) document, or all three. New toolbars hold preview controls. It's more than just a visual change; this enhancement gives you an alternate way to navigate through and select items from the work list above.

Many more enhancements in GX2… here are just a few:

- **Views**: Special variable instructions turn ordinary search templates into flexible, sharable views.
- **Favorites tabs** simplify and speed input on profile fields.
- **Next-generation document viewers** from Oracle, for faster preview loading and the ability to preview .docx, .xlsx and other new file types.
- **Configurable Send To right-click menus**: Now you can "nest" submenus… even list items on the pull-down menu bar at the top of the Worldox screen.
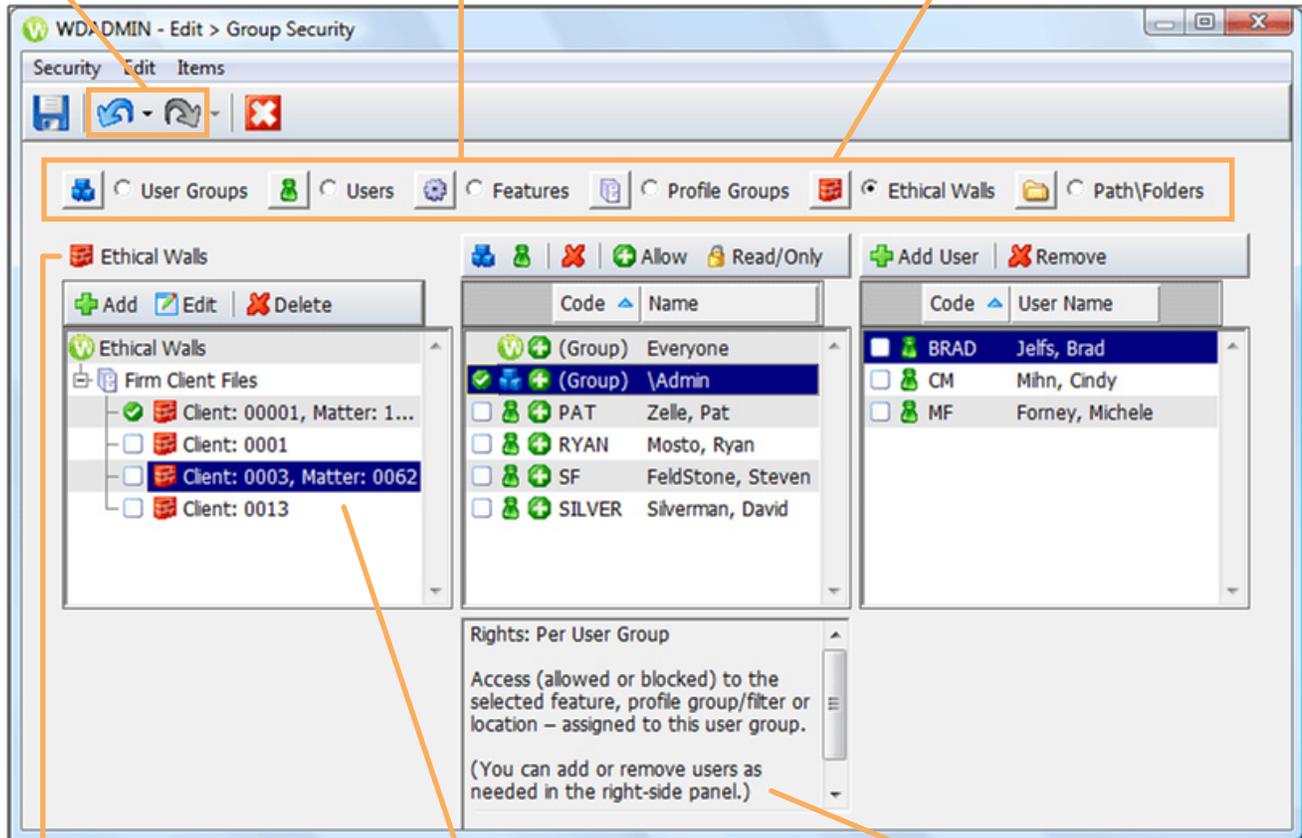- **Automatic word matching** on text entered in *Find Files* search templates.

Scheduled Availability: Fall 2009

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For Worldox Administrators:
Ethical Walls, a redesigned Group Interface and much more...

The ability to create ethical walls is not exactly new in Worldox. What is new in GX^2 is an explicit choice for that option, and a greatly simplified Group Security dialog in WDADMIN. It's so much easier to use. Behind the scenes, there's even a way in GX^2 to target Windows Active Directory application by profile group – should you wish to activate the AD synch.

New Undo, Redo buttons — mistakes are easily corrected.

New mode selection choices make actions and next steps clear, obvious.

In this example, an ethical wall is being set up.

Indicates the mode selected, in progress.

Input starts in a left-side panel. One or two more appear to the right as choices are made.

Helpful descriptions appear beneath input panels to help guide next steps.

For details, contact your Worldox Software reseller:

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