

WORLDOX 2002 Service Release 2

WORLDOX 2002 SR-2 (version 9.5, dated October 31, 2003) is a maintenance release consisting of a series of software fixes, several program enhancements, and some new features and capabilities. SR-2 is a cumulative release, meaning that it incorporates all the fixes and enhancements included in [SR-1](#) and all interim releases since WORLDOX 2002. SR-2 may be applied to *any version* of WORLDOX 2002, regardless of whether SR-1 has been applied or not. We recommend SR-2 for all WORLDOX 2002 sites.

WORLDOX 2002 SR-2 includes the following features and fixes, as described in this document:

[Microsoft® Office 2003 Support](#) (*available as a separate download*)

[E-Mail Export to RTF](#)

[Enhanced PDF Conversion Support via Send To](#)

[Ability to Index Deep Folder Structures](#)

[Program Fixes](#)

[Additional Features](#)

Instructions for acquiring and installing SR-2 have been e-mailed to all current WORLDOX Maintenance customers. If you have not received such an e-mail message, then please contact World Software Technical Support at <mailto:support@worldox.com> support@worldox.com.

MS Office 2003 Support

WORLDOX 2002 SR-2 introduces new support for integration with the following Microsoft Office 2003 programs:

- Word
- Excel
- PowerPoint
- Outlook
- OneNote
- InfoPath
- Basic support for "Choose Document" function of Microsoft SharePoint.

Since most WORLDOX sites have not upgraded to Microsoft Office 2003, integration support is provided separately from the standard WORLDOX 2002 SR-2 upgrade. If your site is using Office 2003, or plans an imminent upgrade, please contact World Software Technical Support at [✉ support@worldox.com](mailto:support@worldox.com) for download and installation instructions.

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E-Mail Export to RTF

In response to requests from WORLDOX customers, WORLDOX 2002 SR-2 introduces the capability to export e-mail messages to RTF (Rich Text Format) files. RTF files maintain formatting from the original e-mail and may be opened in Word, WordPerfect, and other applications. WORLDOX 2002 e-mail export provides the following features:

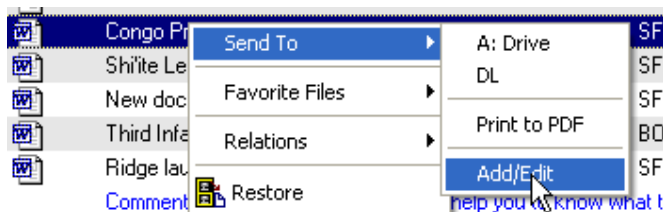
- Exported e-mail messages are saved in RTF format (Rich Text Format)
- Messages are saved with Windows long file names, derived from the message subject
- E-mail header information is saved in a table at the top of the message (From, To, etc.)
- Saved messages may be edited or made read-only

E-mail export is implemented by means of the WORLDOX Send To command. You must define a global Send To shortcut to make e-mail export available to the users at your site. Note that you must be a WORLDOX Manager-level user to define globally settings site-wide. The following instructions show you how to create an e-mail export target.

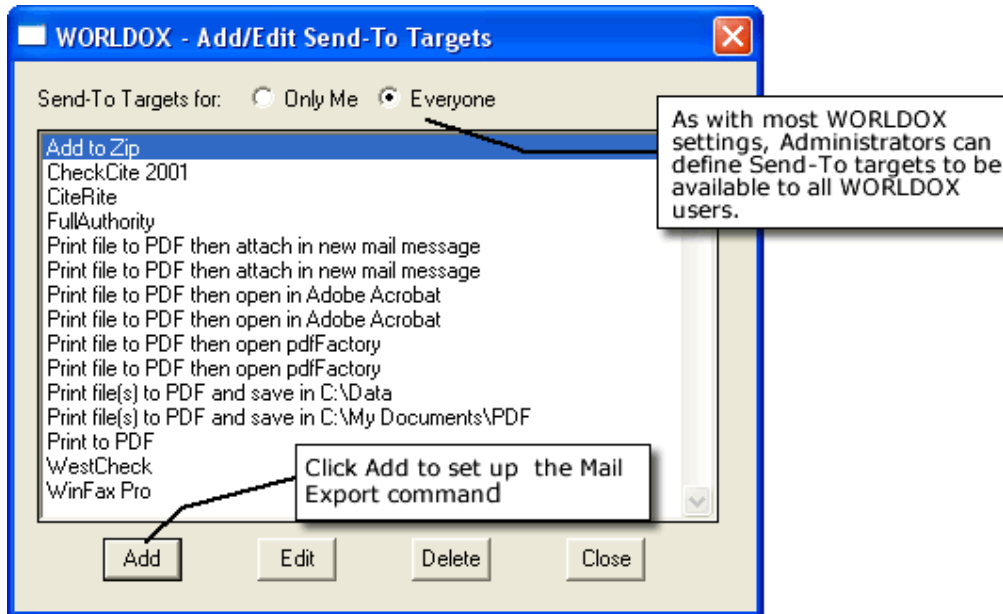
Setting Up WORLDOX E-Mail Export for Send-To

You must manually set up the Send-To target for e-mail export. Begin from the WORLDOX File List. Note that the contents of the file list (the files that are listed) do not affect the procedure. Once you have a WORLDOX File List displayed, proceed as follows:

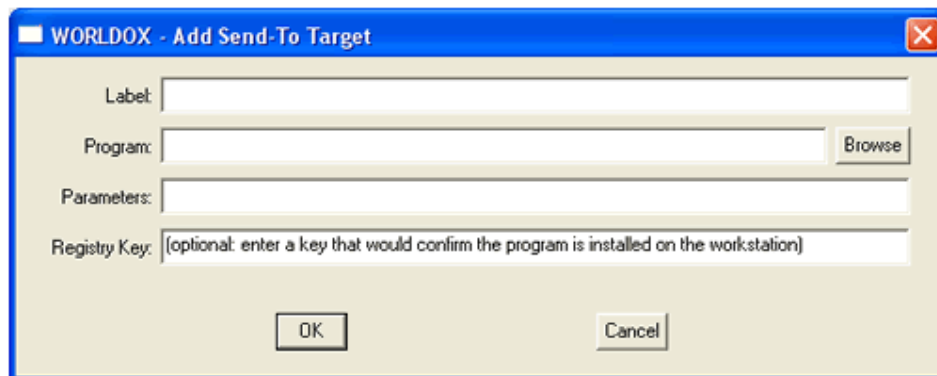
1. Right-click any file in the list and choose **Send To**.
2. Choose **Add/Edit** from the Send To menu, as shown below.



3. If you can see the Everyone option in the dialog, as in the screen shot below, then choose it to set up the the e-mail export target for all WORLDOX users at your site. If Only Me is selected, then the feature is available to only the current user.



4. Click the **Add** button to display the dialog from which you define the Send-To target, as shown in the following screen shot.



5. Enter a name in the Label line of the dialog that will be meaningful to your users. For example: *Mail Export to RTF*.

6. In the Program entry box, enter the program command exactly as follows:

%WDCODEPATH%\WDCOPY.EXE

(Note that there are no spaces in the command above.)

7. In the Parameters entry box, enter the parameters to define the mail export action.

You can specify the *location* for the files to be saved as well as whether or not to make the files *read-only*.

The parameters for e-mail export consist of the following elements:

@%@	Required. Includes all the selected e-mail messages from the WORLDOX File List.
<i>path/filespec</i>	Required. The location and file specification to which the RTF files are copied. For example, C:\DOCS*.*
-R	Optional. By default, the RTF files are created as read-only. If you want to be able to edit the exported files, include the -R parameter.
/LFN	Optional, but recommended. Ensures that the RTF files use Windows long file names.

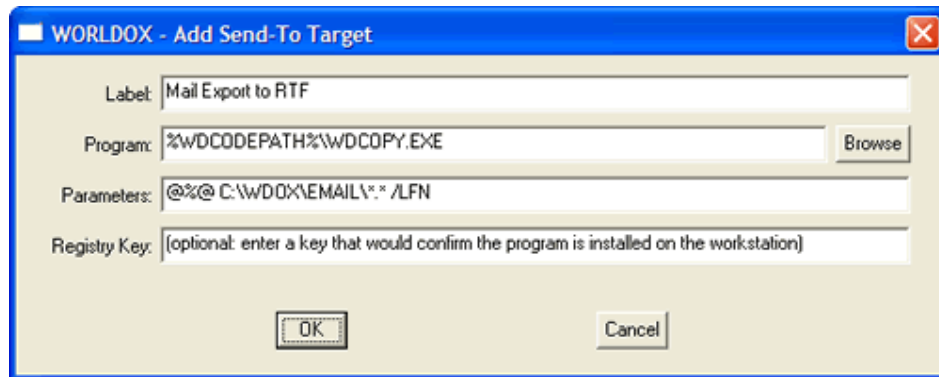
The following parameters instruct WORLDOX to create read-only RTF files and places the exported RTF files in the \WDOX\EMAIL folder of the local hard drive:

@%@ C:\WDOX\EMAIL*.* /LFN

If you would like to be able to edit the exported files then add the "-R" parameter, as shown:

@%@ C:\WDOX\EMAIL*.* -R /LFN

At this point the Add Send-To Target dialog should appear similar to the following screen shot:



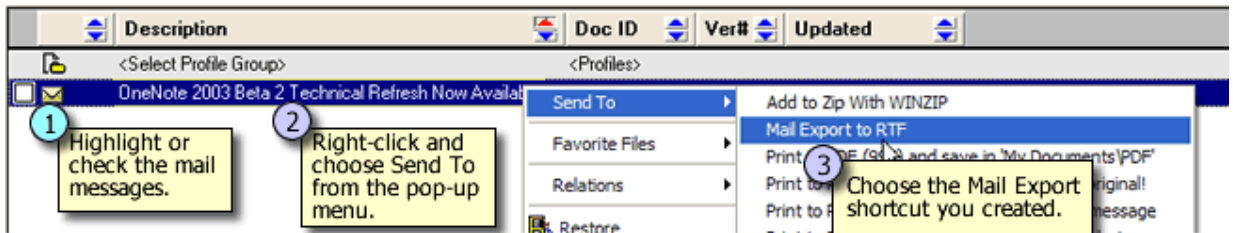
8. Click **OK** to save the target, then click **Close** to dismiss the Send-To Target list.

If you have defined the command for Everyone, then it will be available to users once they exit and then reload WORLDOX.

Exporting E-Mail Messages from WORLDOX

WORLDOX users can use the e-mail export target by following a procedure similar to working with other Send-To targets.

1. Select the e-mail message, or messages, from the WORLDOX File List and right-click.
2. Choose **Send To** and then **Mail Export to RTF**, as shown in the following screen shot. (If you have assigned a different name for the target, then that will appear in your Send To menu.)



WORLDOX exports the e-mail messages, displaying a progress dialog. One RTF file is created for each message exported.

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Enhanced PDF Conversion Support

WORLDOX 2002 SR-2 provides enhancements to integration with PDF conversion software via the Send To command (introduced in SR-1). More PDF programs have been added, and the export options have been standardized across all supported PDF programs.

To convert documents to PDF, you need a PDF conversion program. With SR-2, WORLDOX supports four conversion programs, listed below. Note, also, that most of the conversion programs require Microsoft Word. Furthermore, depending upon which PDF software you use, Word may require filters or converters that are not part of the standard Office install. Make sure you check the requirements for your particular PDF program and that your users' workstations have all the requisite software.

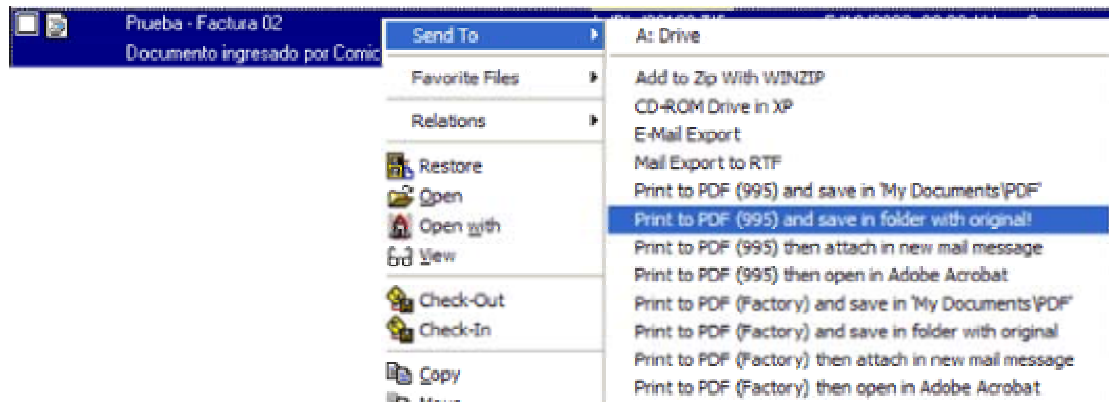
pdf995	http://www.pdf995.com
pdfFactory	http://www.pdfactory.com
Win2PDF	http://www.Win2PDF.com
Adobe PDF Writer	http://www.adobe.com/products/acrobat/ (PDF Writer was included with Adobe Acrobat version 5 and earlier; it is not included with Acrobat 6.)

WORLDOX 2002 SR-2 supported PDF programs.

WORLDOX PDF conversion works via the Send To command, as shown in the following procedure. Unlike the e-mail export feature, targets for PDF programs are added to the Send To list automatically, based on registry values set by the PDF software. After applying SR-2 and reloading WORLDOX you should see targets for the installed, supported PDF conversion programs in the WORLDOX Send To menu.

To convert files from the WORLDOX File List to PDF:

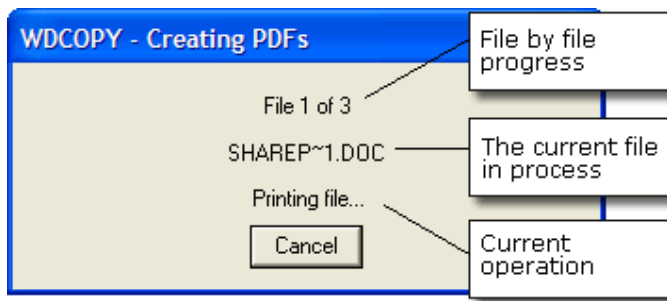
1. Select the file or files you wish to convert to PDF in the WORLDOX File List.
2. Right-click and open the WORLDOX **Send To** menu to choose which PDF program to use from among those you have installed.



WORLDOX displays PDF integration options only for PDF software on the workstation. The workstation in this figure has pdf995 and pdfFactory installed.

3. Choose a PDF conversion option. Each PDF program supports [four different actions](#), which determine how the PDF file is handled upon creation.

WORLDOX begins the conversion process by copying the document(s) to a temporary location and displaying a progress message, similar to the following screen shot:



When working with PDF programs based on MS Word, WORLDOX opens the document in Word. Word then sends the document to the PDF conversion program via the Print command and exits. If you have more than one document selected, the process occurs in batch.

PDF Conversion Options

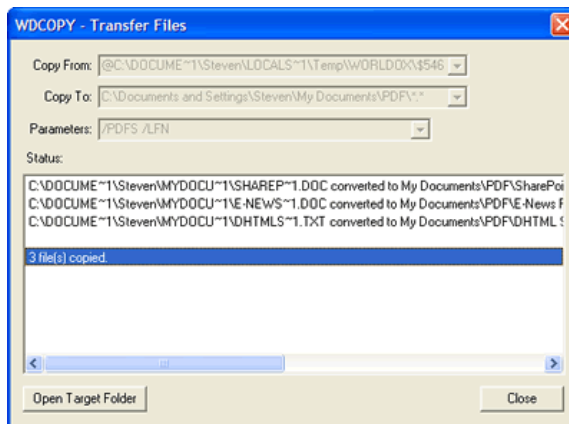
The end result of the command depends upon which conversion option you have chosen. You may choose from the following four options:

- [Print to PDF and save in 'My Documents\PDF'](#)
- [Print to PDF and save in folder with original](#)
- [Print to PDF then attach to new mail message](#)
- [Print to PDF then open in Adobe Acrobat](#)

Each option is described below.

Print to PDF and save in 'My Documents\PDF'

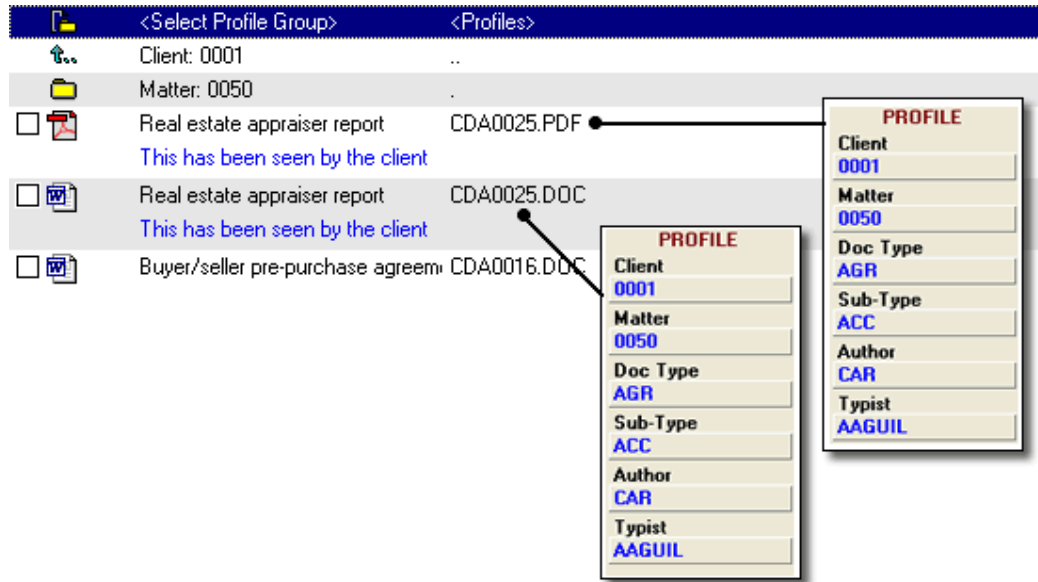
Places the PDF files in the My Documents\PDF folder of the workstation's hard drive. If the folder does not exist, WORLDOX creates it. After placing the files in the folder, WORLDOX displays a confirmation message that lists the PDF files created. You can click the **Open Target Folder** button to navigate to the PDF folder in Windows Explorer, or you can **Close** the message window and return to WORLDOX.



Note that any WORLDOX security applied to the source document does not carry over to the PDF file, as the PDF is placed on the user's local hard drive.

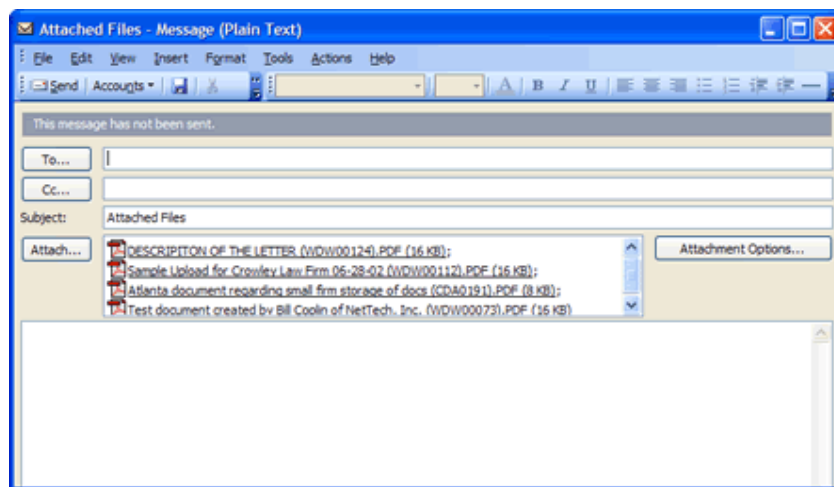
Print to PDF and save in folder with original

Places the PDF files in the same folder as the documents from which they originated. As shown in the following figure, PDF files created this way inherit the document number, profile information, and comments from the source document. Any security in effect for the source documents is also inherited by the PDF files.



Print to PDF then attach in new mail message

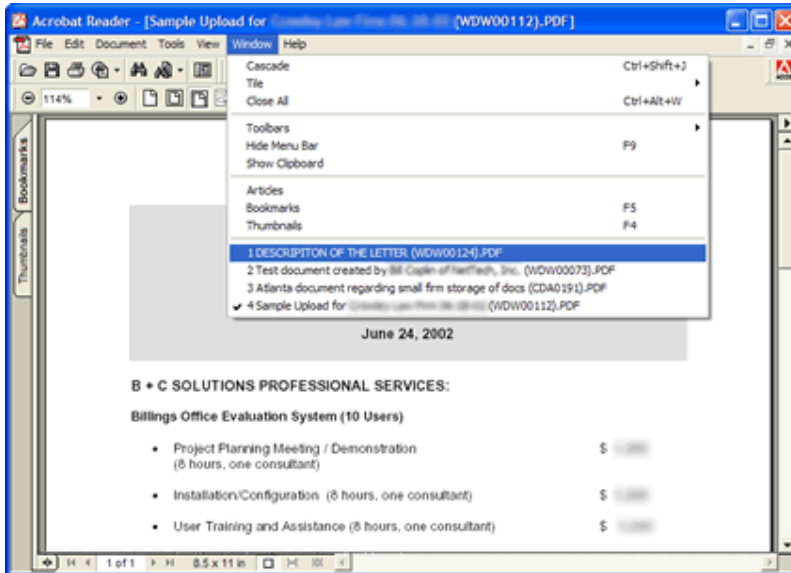
Opens the workstation's e-mail client program, creates a new e-mail message, and attaches the PDF files. The following figure shows a blank e-mail message created for Outlook 2003 with four PDF files attached.



Enter the address information and text of the e-mail message and send it as you would normally.

Print to PDF then open in Adobe Acrobat

Opens the workstation's default PDF viewer (which is generally going to be Adobe Reader) and loads the PDF files for viewing. The following screen shot shows the Adobe Reader Window menu opened to reveal that four PDF files have been loaded into Reader.



Note that, depending upon your Windows environment, the Adobe Reader window may not be the uppermost window on your desktop.

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Ability to Index Deep Folder Structures

Enhancements to the Indexer in WORLDOX 2002 SR-2 now allow for the indexing of arbitrarily deep folder structures. This enhanced capacity is applicable to a limited number of sites with legacy folder structures consisting of long UNC or path names. Existing WORLDOX client/matter structures are not affected by this change.

If you suspect that your site has folders that were not "reached" by the Indexer, to ensure that all such folder structures at your site are properly indexed, simply re-initialize and update your WORLDOX databases.

To initialize the databases:

1. Start the WORLDOX Indexer in maintenance mode. (Note that if the Indexer is running in server mode, then click **Close Server** and confirm that you want to close it.)

2. Set the check box to the left of each drive you want to index in the Active Drives list at the top of the Indexer window.
3. Choose **Update** from the Indexer menu and then select **Profiles and Text**.
4. Choose **Initialize and Create databases** from the Confirm Update dialog.
5. Click **OK**. The Indexer begins processing your update request, displaying a window showing its progress. When completed, an OK dialog appears confirming the completion of the build.

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Program Fixes

WORLDOX 2002 SR-2 incorporates the following program fixes and minor enhancements:

General

- Users can now launch URLs directly from WORLDOX. Doing so opens the default browser to the URL.
- In the Audit Trail list, check-boxes now appear beside each file.
- The PDF Writer Send To option now works properly.
- An error encountered when attempting to copy up new files created offline has been fixed, allowing the files to be moved properly.
- An error has been fixed in the way that the DATE field format handles leap year dates (i.e., 2/29/2000).
- An error that caused WORLDOX to generate a "Not available" message when attempting to create a new profile has been fixed. The error would occur if the "Prompt when creating new folders" WORLDOX Preference was set to Yes, and the Profile Group in question was UNC-based.
- Previous (historical) paths entered in the Save Dialog did not always display properly. This has been fixed.
- Fixed how WORLDOX determines the "Default" Profile Group. Previously WORLDOX would retain "Personal" defaults even after such defaults were deleted by a user.
- Auto-Complete on Field Tables waits until unique text has been entered.

Field Tables

- When searching field tables for a code description that did not exist, some users experienced a condition where the search failed to terminate. This has been fixed.

DropZone

- Various minor problems reported with DropZone templates have been fixed.
- Users can now drag URLs directly to DropZone. When profiled, WORLDOX creates a text file with a .url extension. The contents of the file contain a heading, the URL, and a key that indicates when the URL was modified. For example:
[InternetShortcut]
URL=http://www.worldox.com/about/pr_isys.html
Modified=C06E866F96A7C30123
- Isolated problems with creating and editing Global and Personal DropZone Profiles have been fixed.
- When dropping multiple files on DropZone, they are now all tagged by default.
- After profiling the first of a group of files dropped on DropZone, you now have the option to auto-profile the remaining files. All the subsequent profiles are based on the information in the initial profile, as entered by the user.
- When multiple files are saved through DropZone, it no longer stops after the first file.
- Files saved via DropZone are now properly audited.

Quick Profiles

- Default values set in Quick Profiles for e-mail messages in the WORLDOX InBox did not always come across properly. This has been fixed.
- Quick Profiles for e-mail messages in the WORLDOX InBox now accept security settings as part of the template.
- In Quick Profiles, sometimes a question mark (?) was displayed instead of a drive letter in the path. This has been fixed.
- Quick Profiles now work if the path defined includes a %usercode% variable.

Copy/Move

- During Copy and Move, if neither the Keep Same as Source or Assign AutoName options were selected, WORLDOX automatically defaulted to Keep Same as Source. It now prompts the user to make a selection.
- When Copying or Moving multiple tagged files, if any are in a Profile Group that does not allow the action, the appropriate message appears, informing the user.

Favorite Files

- Favorite Files now track in more than one category. Previously, if a file was accessed via multiple categories, Favorites tracked only the most recent means of access for a given file.

Importing

- When importing document profiles, WORLDOX now supports Comments with up to 4096 bytes (the previous limit was 1024 bytes). The length of the Prefix/Suffix fields have been expanded from 64 characters to 128 characters.

WORLDOX Administration

- The Users > Add/Edit > Users > Print option in the WORLDOX Administration program now properly prints the user list.
- Problems with the [WDCOPY /clean switch](#) have been fixed so that the option now works properly.
- UNC validation routines have been streamlined to improve file access speed.
- A memory leak in the new method for posting profile changes to the WORLDOX Indexer ("Version 2 posting") has been fixed.
- A patch to W9FIND.DLL enables searching files when offline
- A patch to W9USERS.DLL allows editing user's initials in the WORLDOX Administration program.
- In Microsoft Word, the WORLDOX document File Stamp variable for Date-only (date with no time) now works properly on the first save.
- If the root of a profile group's base path is *blocked* (in WORLDOX Groups), but sub-folders beneath that root are *allowed*, the profile group validation would fail in some cases. In such cases, the profile group would not be presented to users in WORLDOX dialogs. This has been fixed.
- WORLDOX no longer persistently maps drives where it does not make sense to do so. For example, if a user requires access to a drive at a distant site for searching or for file access, WORLDOX will no longer attempt to maintain the mapping across sessions.
- The Windows path is now derived from the environment variable %windir% instead of the registry.
- Direct Access Quick Profiles set in the WORLDOX Administration program were mistakenly applied to "Save Defaults." This has been corrected.
- Auto-complete fields are supported by a new Profile Field attribute (#10 - Auto-complete Field). This attribute is checked (enabled) by default. Unchecking will disable auto-complete for that field.

WORLDOX E-Mail Management

- The WORLDOX Inbox folder is now available when working off-line.
- The process WORLDOX uses to load items in the InBox has been adjusted so that users experience less "flashing" in the display.
- Viewing certain types of HTML-based e-mail messages that may have previously caused errors, no longer causes such errors.

- Some WORLDOX e-mail files (.WDN and .WDM) that were converted to RTF through a WORLDOX Send To, erroneously created HTML files. That has been fixed so that the files are now created as RTF.
- E-mail file attachments from folders with long file names were attached with short file names; this has been fixed so that the long file name is now used.

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Additional Features


View Files Copy-Down Restriction

WORLDOX copies files from the network to the local hard drive when users view them. This is to prevent an editable file from being locked by the network from edit while someone is merely viewing the file. Sometimes, however, this is not desirable. For example, when viewing large graphics or PDF files, users must wait for the copy-down to complete before the file can be viewed.

With WORLDOX 2002 SR-2, you can now configure WORLDOX to keep from copying certain file types. This is controlled by editing the **WDINSO.INI** file in the WORLDOX program folder on the network. The section that controls this function is: [ViewCopy].

Under that section, add the "Inso Code" value of the file type you want to exclude from copy-down on view with a =0 switch. So, for example, to do this for TIF images, the setting is:

```
[ViewCopy]
1501=0
```

The Inso codes for files are listed in the WDINSO.INI file. If have questions about how to use the Inso codes, please contact World Software Technical Support at  support@worldox.com for further information.

WDCOPY

The WORLDOX file copy utility, WDCOPY.EXE, has a new parameter: **/CLOSE**.

This closes WDCOPY after successfully completing the specified operation, rather than pauses at a confirmation prompt. Note that if there is an error on one or more files WDCOPY remains open so the user can see which file(s) failed to copy.

WORLDOX Send To

The WORLDOX Send To command has a new parameter: **%p**.

This substitutes the selected file's path. This can be used to create a Send To target which copies ALL files from the selected file's folder. An example illustrating the use of both the /CLOSE and %p parameters, is shown below:

```
Label=Copy All Files in File's Folder  
Program=%WDCODEPATH%\WDCOPY.EXE  
Params="%p\*.*)" C:\WDLOCAL\*.*/CLEAN /CLOSE
```

Note the quotes around "%p.*)" in the example above. These are CRITICAL (to handle source folders that may contain spaces).*

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