Amicus Link Guide: Worldox

Applies to: Amicus Attorney

Take advantage of Worldox® document management capabilities from within Amicus.

About the Link

Amicus Attorney features enhanced integration with Worldox that allows you to take full advantage of the document management capabilities of that application within your Amicus environment. Client and Matter information is exported to Worldox from eligible Amicus Files. You have easy access to Worldox documents on Amicus Client Matter Files and Amicus Library resources, as well as the powerful search capabilities of Worldox.

Once the integration is configured for the firm, any existing Amicus Document records will become unavailable, replaced with access directly to the Worldox interface.

IMPORTANT: Due to field limitations in Worldox, do not enter Amicus Client or Matter IDs longer than 12 characters. Otherwise, the uniqueness of a File cannot be guaranteed in Worldox. For example, if the IDs for two Files each start with the same 12 characters, only one Document Cabinet will exist in Worldox and you might not be able to access the documents related to one File separately from those related to the other.

What you need

The Amicus Attorney-Worldox Link requires that both products must be installed and running properly on the workstations of users who wish to use or configure the Link:

- Amicus Attorney Workstation
- Worldox GX (OR-1 or later) Client

For a list of supported Worldox versions, see the *Amicus Attorney System Requirements*, available from our website.

During the Link configuration, it might be necessary for the Amicus Administrator to consult the Worldox Administration program (WDADMIN).

Configuring the Link for the firm

The Link can be set up from any Amicus/Worldox Workstation.

1   Log in to **Worldox** as a user with access to all **Worldox Document Cabinets**.

2   Log in to **Amicus Attorney** as an **Amicus Administrator**.

3   In **Amicus Attorney**, choose **Office > Firm Settings**. Then choose **General - Document Management**.

4   Select *Let Worldox manage documents and document searches* from the drop-down list.
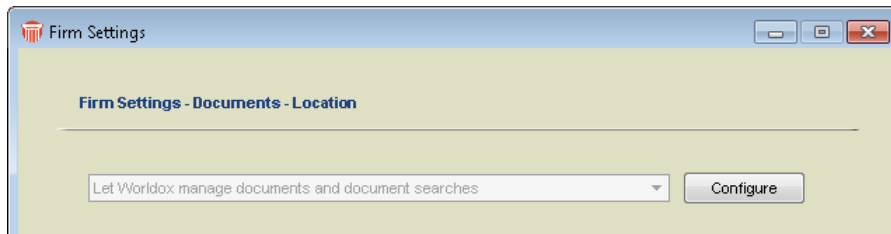
5   Click **Configure** to run the **Link Configuration** wizard.

The main dialog of the wizard displays the current completion status of each step in the configuration.
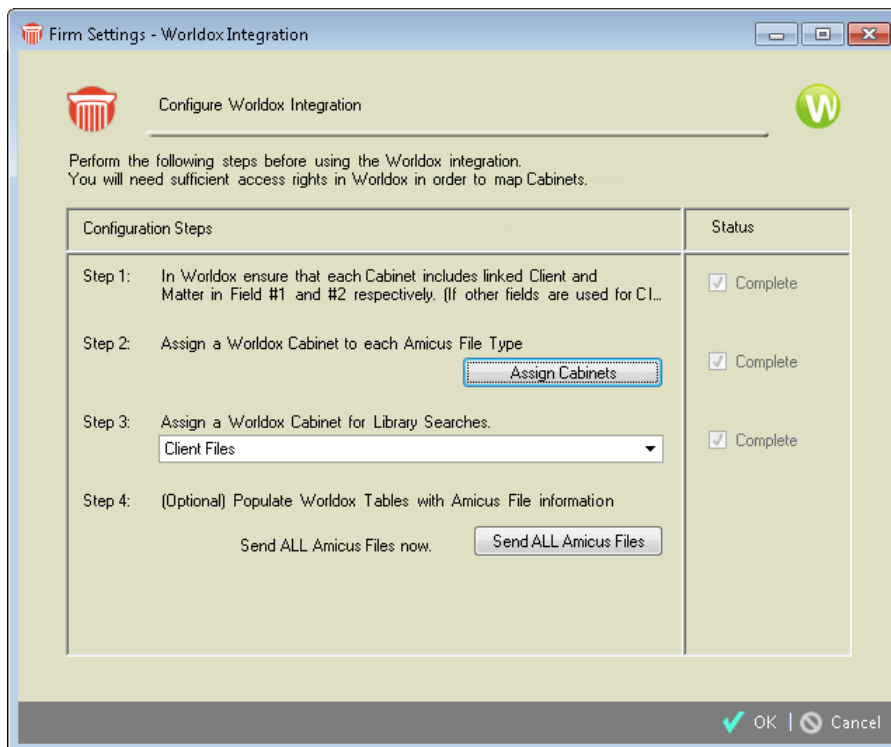
Complete the configuration steps as described in the following sections. The completion status of each step is shown at the right.

Step 1 – Preparing Worldox Cabinets

In the Worldox Administration program (WDADMIN), ensure that every Cabinet to be used in conjunction with Amicus File has been created and includes, by default, "Client" in Field 1 and "Matter" in Field 2, with Field 2 linked to Field 1.

If Document Type is included (in Field 3 by default), you will be able to open Worldox filtered to Documents based on Document Type directly from the Amicus File.

If you need a different configuration, such as Client in Field 3, Matter in Field 4, and Document Type in Field 5, please contact your Amicus Consultant or Amicus Technical Support for assistance.

We recommend that you set the Client and Matter Fields to the maximum length of 12 characters.

Mark this step as Complete in the Status column.

Step 2 – Mapping Worldox Cabinets

Click the **Assign Cabinets** button in Step 2. The **Files – Worldox Cabinets** view of **Firm Settings** opens.
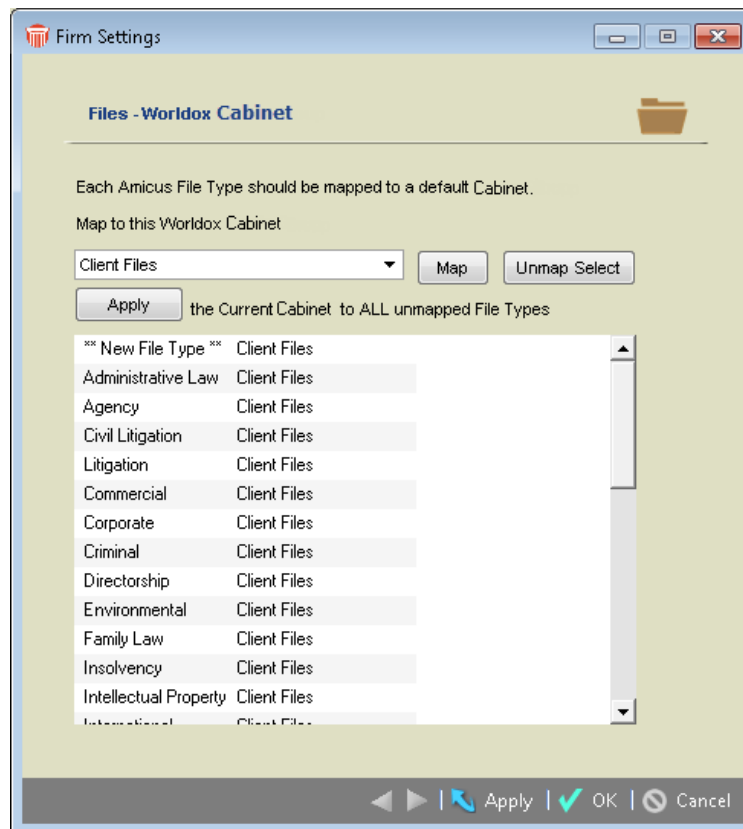
Map the Amicus File Types to **Worldox Cabinets**. All Amicus File Types must be mapped.

- To map a particular Cabinet to all currently unmapped File Types, select that Cabinet in the list box at the top and then click **Apply** below the box.
- To provide a default mapping for any File Types added in the future, select "**New File Type****" in the lower list, select the desired Cabinet in the list box at the top, and then click **Apply** below the box.

When finished, click **OK**.

Step 3 – Assigning a Worldox Cabinet for Library resources

In the list box next to Step 3 in the Link wizard, select the default Cabinet that you want used when Amicus users attempt to find a Worldox document to attach to a Library Page.

Step 4 – Populating Worldox Cabinet Field Tables

There are two methods for initially populating the Client and Matter Cabinet Field Tables in Worldox with the Client/Matter information from Amicus:

- If you are logged in to Amicus as a user assigned a Security Cabinet that permits access to all firm Files (the "Other Firm Members' Files" permission), then you may simply click the Send All Amicus Files to Worldox Now button next to Step 4 in the Link wizard. Depending on the number of Files, this process might take a while. Note that Restricted Files for which you do not have viewing or edit permission will not be exported.

- Alternatively, each Amicus user may choose the Actions > Send To Worldox command in the Files module to export the information for their Files. See "Exporting Client Matter information" on page 7.

Maintaining the Link – File Types

Whenever File Types are added or deleted in Firm Settings, an Amicus Administrator should go to the **Files – Worldox Cabinets** view of **Firm Settings** and ensure that the File Type-Cabinet mapping is correct.
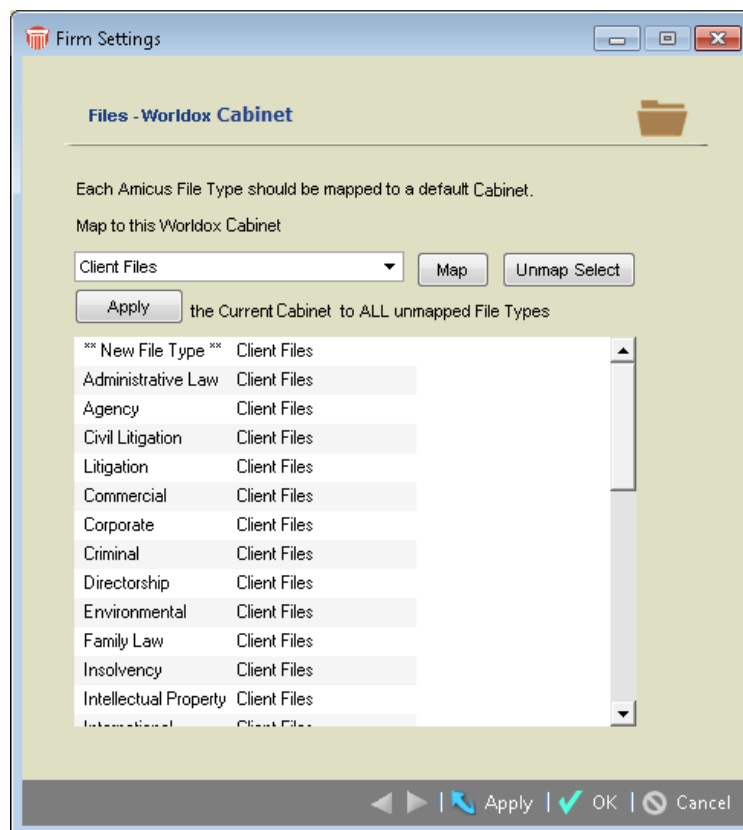
User Preference for document searching

Each Amicus user should set a default Worldox Cabinet to be applied in searches from Amicus whenever there is no corresponding Cabinet for the relative File.

1 Select **Office > Preferences**. Then choose Documents - Searching in the **Preferences** view. The **Documents - Searching** view of the details dialog appears.
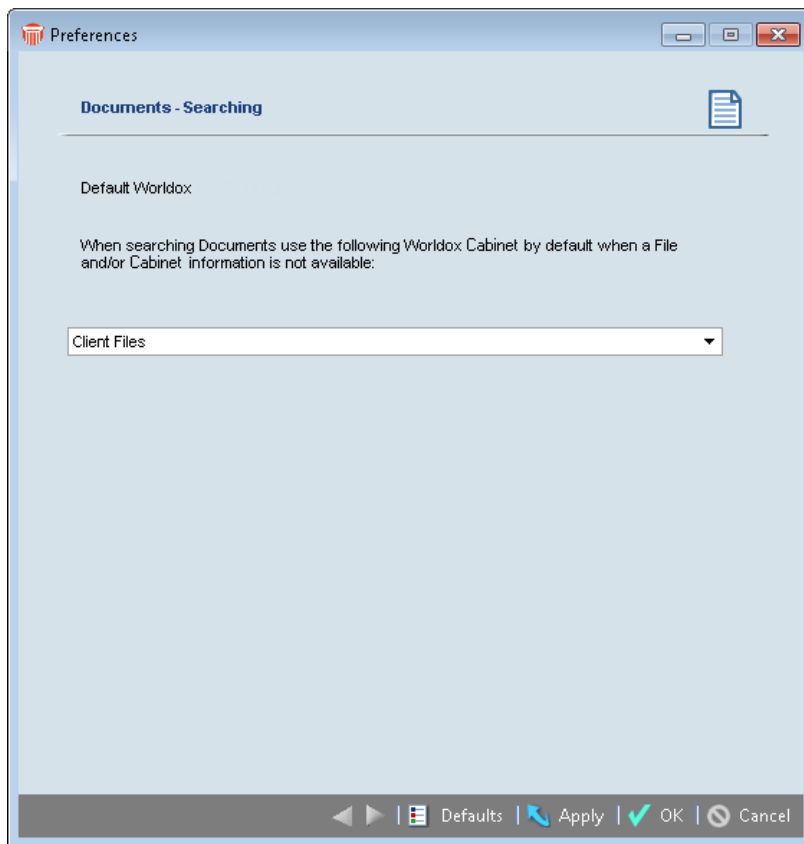
2 Select the desired **Cabinet** from the drop-down list.

3 Click **OK**.

Using Amicus with Worldox

Exporting Client Matter information

Client Matter information is exported in one direction only, from Amicus Files to Worldox Cabinet Field Tables. An Amicus File's target Worldox Cabinet is determined by its File Type as configured by your Amicus Administrator. Files that are eligible to be exported must have a Client ID, Matter ID, and a File Type that maps to a Worldox Cabinet. **Due to field limitations in Worldox, do not enter Client IDs or Matter IDs in Amicus Attorney longer than 12 characters.**

Your Client Matter information can be sent to Worldox from the Files Index or a File Details. Amicus Administrators can also send Client Matter information to Worldox from Firm Settings. Note that if your Amicus Files are created via integration with an accounting or other program, they are not automatically sent to Worldox during this process.

Amicus File field	Worldox Document Cabinet Field (default settings)
Client ID	Field 1 (Client)
Full Client Name	Field 1 Description
Matter ID	Field 2 (Matter)
Short File Name	Field 2 Description

Rather than limiting your integration to Worldox Cabinets that have Client and Matter configured in Fields 1 and 2 respectively, Amicus supports other configurations of these two fields. The Matter field must be set in the Worldox Cabinet as being "Linked to prior field", namely Client. For example, your Firm may prefer to have Department in Field 1, Project in Field 2, Client in Field 3, and Matter in Field 4. Your Amicus Consultant or Amicus Technical Support can help you set up your Worldox integration with Amicus so it works the way that best suits your Firm.

Exporting from the Files Index

To export Client Matter information from one or more Files, select them in the Files Index list and then choose the Send To Worldox command on the Actions menu.

Exporting from Files Details

To export Client Matter information from File Details, choose the Send To Worldox command on the Actions menu.

When you save a File or go to the Documents view of File Details for an unexported File that has sufficient information, a prompt asks whether you want the information sent.

Automatically created Amicus Files

If Amicus Files are created automatically (e.g. by an accounting Link), they are not automatically sent to Worldox. Each user may export these Files individually as encountered afterward. Alternatively, users could select their Files in the Files Index and export them.

Viewing documents from File Details

To add or access documents on a File.

1   Open the **File Details** and choose **Documents** on the navigation list in the control panel.
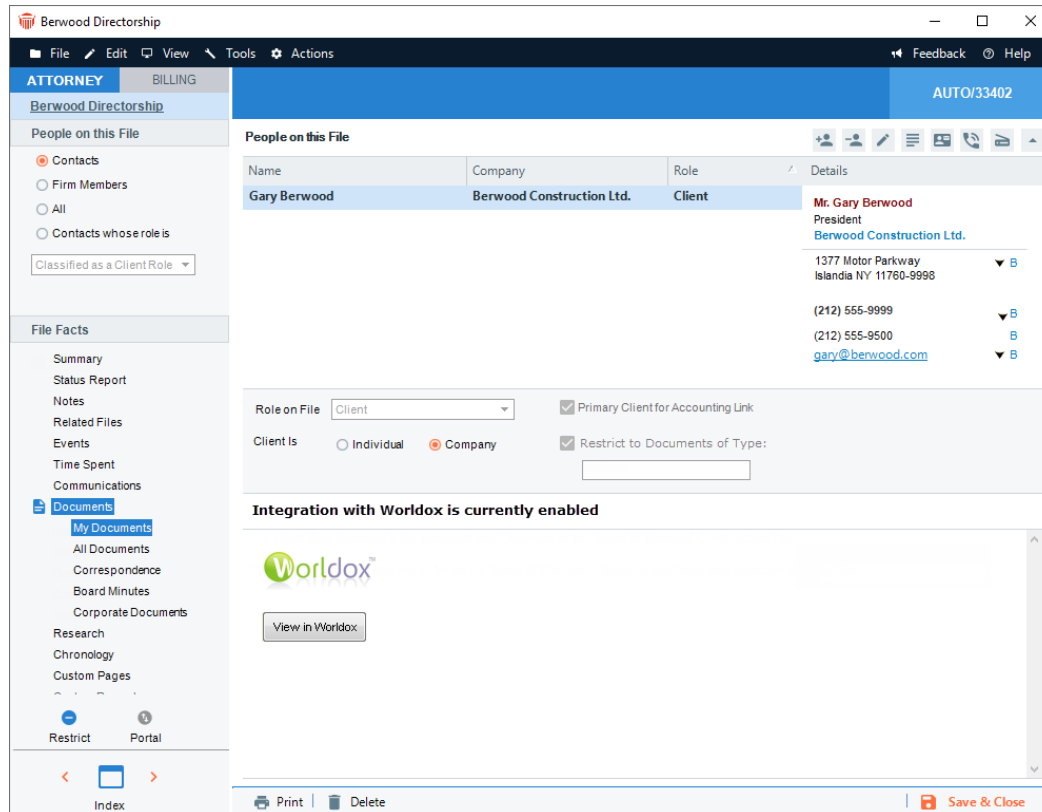
2   In the **Documents** view, enter the **Document Type** you want to see (e.g. AFF), provided your **Worldox Cabinets** includes a **Document Type** field.

3   Click **View in Worldox**.

4   You can apply the search capabilities of Worldox to your advantage when using the **Restrict to Documents of Type** field.

For example, your Amicus File has over 500 documents in various Document Types in Worldox, such as Email, Affidavits, Discoveries, Motions, etc., and the majority of the documents are Email. To see all documents except those that are Email, enter "NOT EMAIL"—the result will be all other documents, except Email. Or you could enter "AFF OR DISC*" to view all Affidavits and Discovery documents related to the File.

For more information, see the *Text Searching* topic in the Worldox Help.

If the File Client Matter information has NOT been previously exported, a prompt asks whether you would like the information sent now. Click **Yes** to send the information and open Worldox to the appropriate view. Or, click **No** to not export the File. (The File requires a Client ID and Matter ID, and a File Type that maps to a Worldox Cabinet.)

Cabinet assigned to a File

To see the **Worldox Cabinet** for a file, open the **File Details** and choose **Admin** on the navigation list in the control panel. The **Cabinet** that maps to the **File Type** is shown in the brad view.

Note: A **Cabinet** is shown only for files whose **Client Matter** information has been exported to Worldox.

Viewing documents from Person Details

To add or access documents on a file from **Person Details**, choose **Documents** in the navigation bar.

In the **Documents** view, click the **View In Worldox** button. The **Worldox Search** dialog opens. Make the appropriate selections.

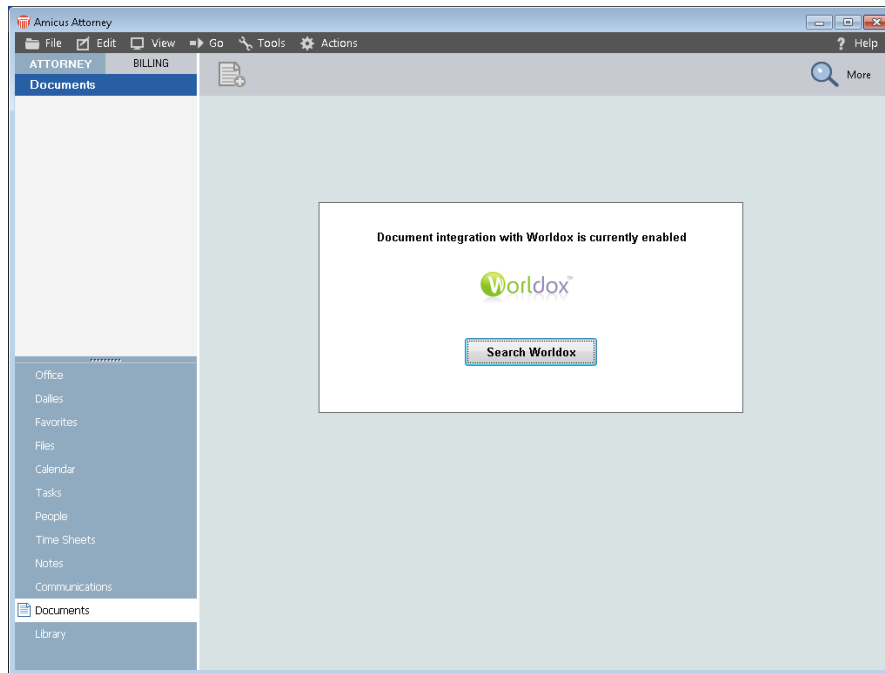## Viewing documents from the Library

A Library Page can be associated with a Resource that is a document. This is done from the **Launch Details** view of the **Library Details** dialog.

If you wish to associate a Worldox document, select the **This Library resource is access via the firm's document manager** checkbox before clicking the **Path/URL** button. Worldox automatically opens to a list of documents in the **Worldox Cabinet** set by default for this purpose by your Amicus Administrator.

Viewing documents from the Documents module

To access documents from the **Documents** module, click the **Search Worldox** button on the screen. This search function is described in the following section.


Searching documents

You can search Worldox for documents from the following places in Amicus Attorney:

- **File Details**—Choose **Tools > Search Documents** or click **Search Documents** on the Amicus Advanced Toolbar.

- **Files Index**—Choose **Tools > Search Documents** or click **Search Documents** on the Amicus Advanced Toolbar.

- **People Details**—Choose **Tools > Search Documents** or click **Search Documents** on the Amicus Advanced Toolbar.

- **Library**—Click the Search Library link in the control panel and then, in the **Search** dialog that appears, click the **Search Worldox** button at the top right.

- **Documents module**—Click the **Search Documents** button on the screen.

- **Search**—Choose **Tools > Search** and then, in the **Search** dialog that appears, click the S**earch Worldox** at the top right.
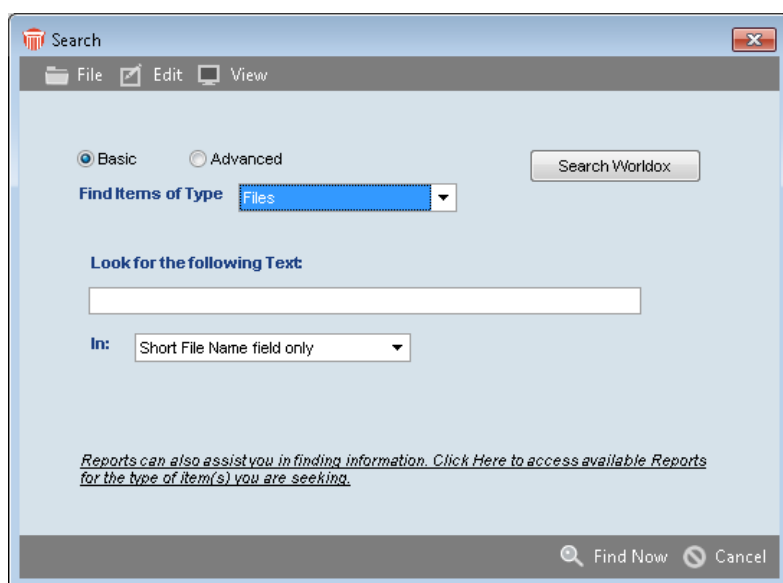
In all cases, the **Search Worldox** dialog appears auto-populated with as much information available.
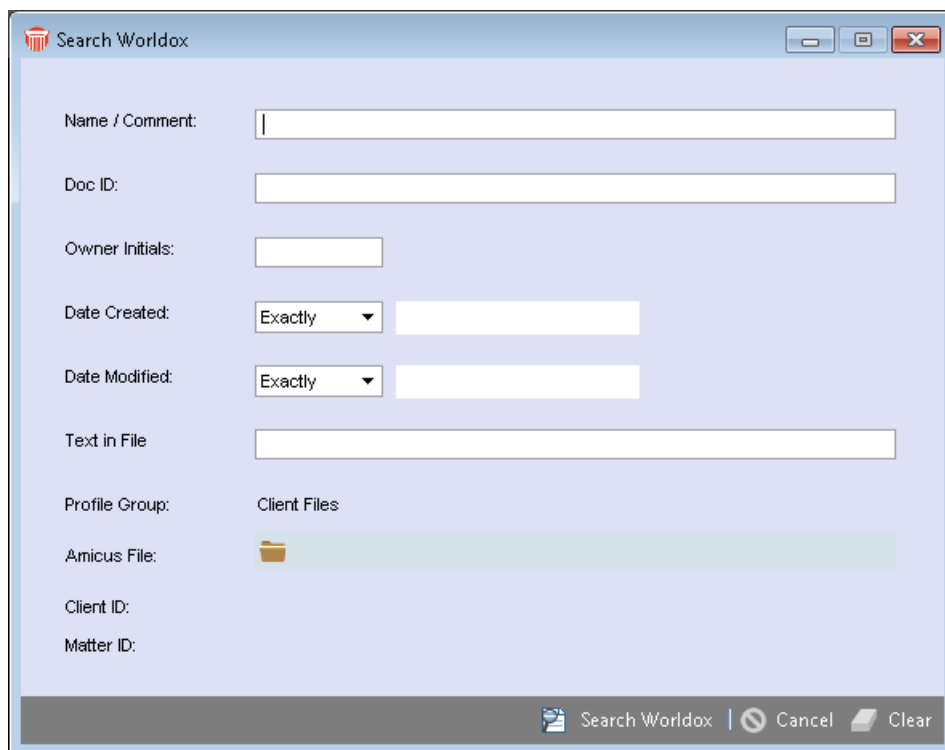
The **Cabinet** and **Amicus File** information will be filled in automatically depending on where you commenced your Search. Alternatively, your default **Cabinet** (set in your Preferences) will be assigned. Fill in search details as desired.

You can apply the search capabilities of Worldox to your advantage when using the **Text in File** field. For example, you can use the wildcard character "*" for word stemming—searching for "pres*" will find words such as "pressure", "president", and "press". You can use the AND and OR operators—searching for "breach AND contract" returns any document that has both terms. To search for complete, literal phrases, enclose the words in quotation marks. For more information, see the Text Searching topic in the Worldox Help. When finished, click **Search Worldox**. The results appear in Worldox.

Document assembly

We recommend that Worldox be running whenever you generate documents from Amicus Attorney. Unlike in the Amicus Document Assembly workflow without Worldox integration, the Amicus Save Options will not appear. Use the Save function in Worldox to save the document to the desired Document Cabinet with the appropriate Client and Matter values. This will result in the document being accessible from the Amicus File.

NOTE: If Worldox is not running when a document is generated, an AMICUS Save Options dialog might appear. Although this dialog includes options for adding the document to Amicus as a Document or Library Page, this command will not result in an Amicus Document record appearing on the File.

Amicus Tasks Toolbar

If the Amicus Tasks Toolbar is installed, smart tags will be enabled in Microsoft Word and Excel. Note however that the Toolbar buttons for adding to Amicus and checking documents in/out are disabled. The Link will manage the document's visibility within Amicus based on its Worldox Cabinet attributes.

E-mail Integration

When an e-mail is saved to Amicus (either automatically or manually), its attachments will not be saved automatically as Amicus Documents. Worldox handles the management of these documents, and they will appear on the appropriate Amicus File based on their Worldox Cabinet attributes.