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# ***Worldox GX3 Installation/Configuration***

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## **CHECKLISTS**

Version 1.1

Revised 4/6/2012

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## 1 OVERVIEW

Worldox installs and upgrade projects are all different. No two firms run their business the same way, treat user access the same, or have the same security needs and document management priorities.

Though every site has unique requirements, the *process* of installing Worldox never changes. Here is a best-practice checklist to help you get it right the first time.

### 1.1 A Caveat

Worldox may be easy to use, but it's not exactly plug and play software.

Installing Worldox requires deep understanding not only of the application suite itself, but more importantly, of the technical environment, workflow and business requirements at individual customer sites. Certain initial set-up decisions - how client profile groups are structured and linked, for example - cannot be easily changed post-installation.

In short, it's much better to get the install right the first time. Before you do installs or upgrades, be sure to check out the documentation available for download from World Software.

- **Worldox Site Planning Guide**

This Guide assists planning for Worldox installation, shows you how to structure profile groups and fields to properly manage documents at your firm.

- **WORLDQX GX3 Configuration and Admin Guide**

This is the master reference for Worldox Administrators and Managers. Instructions for checklist items presented here are presented in the 3-volume configuration and admin guide.

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#### Notes:

- *Both guides are available for download here, on the Worldox Knowledge Base:*

<https://knowledgebase.worldox.com/>

*If you are a current, maintenance Worldox customer, but do not yet have access, just email Technical Support at:*

[support@worldox.com](mailto:support@worldox.com)

*You will have your ID and password in minutes.*

- *Your other main resource is Worldox technical support. Please do not hesitate to call us. (See contact information below.) We can help you plan effectively, and can answer any questions you may have as the install goes forward.*
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## 1.2 Documentation

You can access the latest versions of Worldox installation, administration and user guides by clicking the **Documentation** link on the Worldox Knowledge Base.

<https://knowledgebase.worldox.com/>

You can register for an account from the main page and World Software will email you a password to gain access.

## 1.3 Contacting **WORLDOX** Technical Support

World Software Technical Support is available to Worldox Maintenance Agreement customers free of charge between 9:00 am and 7:00 pm Eastern time, Monday through Friday, except on common American business holidays.

Before calling Technical Support, please do the following:

- Call from the computer that is giving you trouble if you are calling about a specific machine or user.
- If the problem involves an error message, try to leave the message on-screen. If that is not possible, then please *write down the exact error message*. Or, capture that message image on-screen and send it to us. (Just hit the **Prt Scr** key on your keyboard, then paste the image into a Word document.)

To contact Worldox Technical Support:

- Call: **1-201-444-3290**
- Email: [support@worldox.com](mailto:support@worldox.com)

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**Note:** *Providing remote access to World Software Technical support is often a necessary part of the troubleshooting process. Remote access sessions give World Software support technicians the information needed for expedient and effective problem resolution.*

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## 2 CHECKLISTS

### 2.1 WDADMIN

<b>License &amp; Password</b>	
<input type="checkbox"/>	Make sure you have a correct and proper license number and maintenance agreement number.
<input type="checkbox"/>	Set any passwords needed for access to WDADMIN and/or to certain Worldox functions. <ul style="list-style-type: none"> <li>▶ <u>Where</u>: Access passwords can be defined and changed in the <i>Edit &gt; Passwords</i> dialog. Select <i>Passwords</i> on the WDADMIN <i>Edit</i> pull-down menu.</li> </ul>
<b>Domains</b>	
<input type="checkbox"/>	Define all domains, if the firm will be deploying Worldox via WAN. <ul style="list-style-type: none"> <li>▶ <u>Where</u>: In the <i>Edit &gt; Domains</i> dialog. Select <i>Add/Edit</i> on the WDADMIN <i>Domains</i> pull-down menu.</li> </ul>
<b>Users</b>	
<input type="checkbox"/>	Identify and profile Worldox users - anyone who will have access to Worldox. <ul style="list-style-type: none"> <li>▶ <u>Where</u>: You can import a user list via the <i>Import &gt; Users</i> dialog; select <i>Import</i> on the WDADMIN <i>Users</i> pull-down menu. You can also add users individually via the <i>Edit &gt; Users</i> dialog, accessed by selecting <i>Add/Edit</i> on the <i>Users</i> pull-down menu.</li> </ul>
<input type="checkbox"/>	Make sure all user network logins synchronize with Worldox. <ul style="list-style-type: none"> <li>▶ <u>Where</u>: This is done per individual user, on the <i>Network</i> tab of each <i>User Record</i> dialog. You can do this as you first create the user record. If you have imported users, open the <i>Edit &gt; Users</i> dialog by selecting <i>Add/Edit</i> on the WDADMIN <i>Users</i> pull-down menu. Double-click any listed user to see the <i>User Record</i> for that person.</li> </ul>
<input type="checkbox"/>	Define Manager/Administrator access as needed. <b>Note</b> : the default 000000 "master user" must be a manager. <ul style="list-style-type: none"> <li>▶ <u>Where</u>: Via checkbox setting on the <i>General</i> tab of the <i>User Record</i> dialog, accessed as noted in the previous checklist item.</li> </ul>
<input type="checkbox"/>	Make sure that all users have unique <i>User ID numbers</i> , and that none of these IDs are zero. <ul style="list-style-type: none"> <li>▶ <u>Where</u>: This check is done in the <i>Edit &gt; Users</i> dialog, accessed by selecting <i>Add/Edit</i> on the WDADMIN <i>Users</i> pull-down menu.</li> </ul>

User Name	Inits	Seq#	User Code	Is U/M	WD/Web?	User ID#
Master User	CDA	0359	000000	Manager	Yes	1
Aguilar, Alex	27	0000	AAGUIL	User	Yes	27
Alexis Albright	28	0000	AALBRIGH	User	Yes	28
Alaine, Allison	29	0000	AALLISON	User	Yes	29
Almeida, Al	30	0000	AALMEIDA	User	Yes	30
Argonot, Arianna C.	31	0000	AARANA	User	Yes	31
Aronson, Alan H.	32	0000	AARONSON	User	Yes	32
Bush, Aszam	33	0000	ABACCH	User	Yes	33
Barreto, Amela	34	0000	ABARRETO	User	Yes	34
Coyle, Andrew	AC	0000	AC	User		458
Temp Account	AT	0000	ADC	User	Yes	20
Bakerman, Bill	BB	0000	BB	User	Yes	23
Jackson, Bodie	4	0000	BJAC	User		4
Jeffers, Brad	BJ	0000	BRAD	User	Yes	21
Donerty, Chris	CD	0003	CD	User	Yes	15
Client View	CV	0000	CLIENT	User	Yes	25

FIGURE 1: Looking for duplicates and zero values in the User ID# column.

- If it is not already visible, you have to add the *User ID#* column in this dialog. Left-click on an empty (gray) area in the column header bar, then select *User ID#* from the list. That adds this column.
- Now scan the list. You are looking for duplicates, or zero values. These are rare in new installs, but are sometimes seen in upgrade installations.
- If you see any duplicates or zero-value user ID#s, please contact Worldox technical support before continuing. (See contact info in Section 1.2 on page 2.)

- Define mirroring and start-up options (for the entire user group).
- ▶ *Where:* This is done in the *Edit > Users* dialog, accessed by selecting *Add/Edit* on the *WADMIN Users* pull-down menu. Select *Mirroring* or *Startup* from the *Options* pull-down menu.

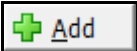
### Security

- Customize security groups to accommodate the security needs at this site. Typically, this involves blocking or allowing access to folder locations or features for groups, subgroups and/or individual users, reflecting a coordinated, strategic approach to Worldox security.
- ▶ *Where:* This is done in the *Edit > Group Security* dialog, accessed by selecting *Groups* on the *WADMIN Security* pull-down menu.

## Profile Groups

- Define and create your profile groups.

This step varies greatly site to site, depending on what data is available to identify documents and how the firm needs to access those documents. Once again, profile group structure should reflect a coordinated, strategic approach. Planning is everything here; you have to fully understand a firm's business in order to do this step properly.

- ▶ **Where:** Profile groups are created in the *Edit Profile Group* dialog, accessed by clicking  at the bottom of the WDADMIN *Edit > Profile Groups* dialog. (To reach *Edit > Profile Groups*, select *Add/Edit* from the *Profile* pull-down menu.)

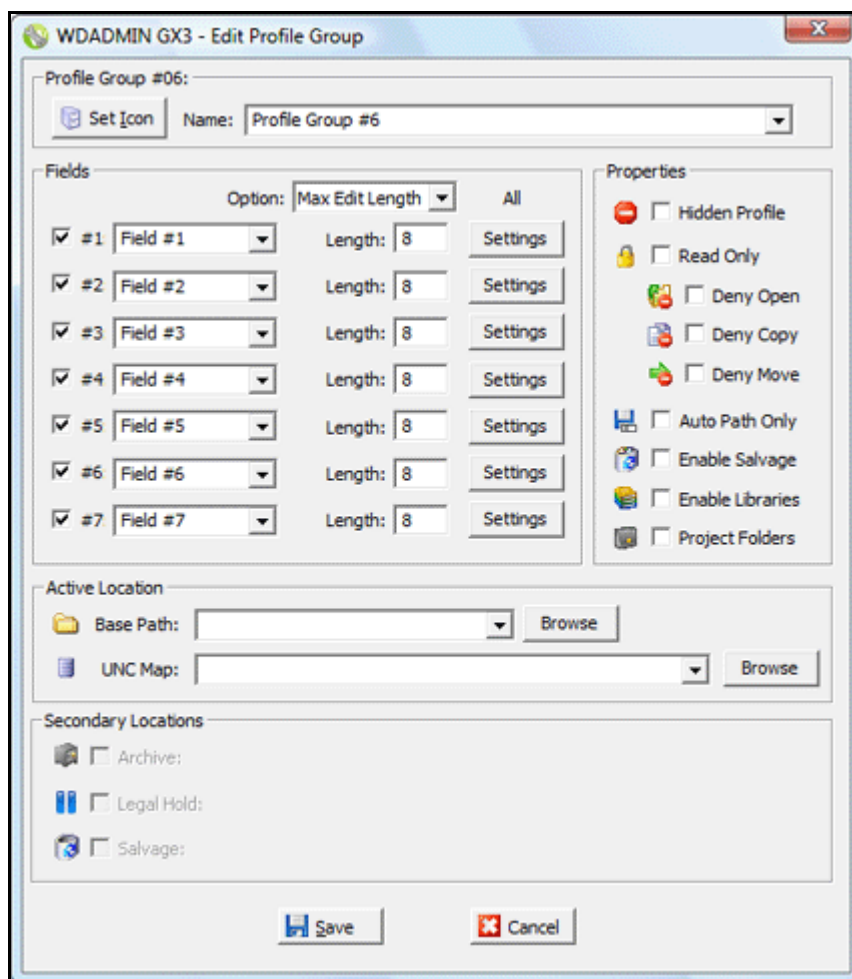
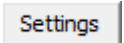
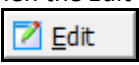


FIGURE 2: The Edit Profile Group dialog in WDADMIN.

- Make sure each profile group created has a valid base path defined, and correct UNC mapping.

- ▶ **Where:** Profile group base path/UNC locations are defined in the *Active Location* section of the *Edit Profile Group* dialog, accessed by selecting *Add/Edit* from the WDADMIN *Profile* pull-down menu.



<input type="checkbox"/>	<p>Define and create the field structure (hierarchy) for each profile group. Before you actually create and configure these fields, plan it out on paper. Then ask yourself if that scheme makes sense. By this we mean several things. Fields have to line up with data of actual value in identifying and finding documents. Fields should also reflect a distributed (multi-level) directory structure, so that documents are stored efficiently.</p> <p><b>Note:</b> The <i>Worldox GX Site Planning Guide</i> can be a great help in planning out profile groups. (See Section 1.1 on page 4 to find out how you can get a copy.)</p> <ul style="list-style-type: none"> <li>▶ <b>Where:</b> Individual profile group fields are defined in the <i>Fields</i> section of the <i>Edit Profile Group</i> dialog, accessed by selecting <i>Add/Edit</i> from the <i>WDADMIN Profile</i> pull-down menu.</li> </ul>
<input type="checkbox"/>	<p>Define field settings (field linking, folder, format, et al.), to ensure accuracy.</p> <p><b>Note:</b> The <i>Worldox GX Site Planning Guide</i> can be a great help in structuring and linking fields. (See Section 1.1 on page 4 to find out how you can get a copy.)</p> <ul style="list-style-type: none"> <li>▶ <b>Where:</b> Settings for each field are defined in <i>Field Settings</i> dialogs, which are accessed by clicking  to the right of each field on the <i>WDADMIN Edit Profile Group</i> dialog. You can use the <i>Options</i> drop-down field on this dialog to set fields without having to open <i>Field Settings</i> dialogs.</li> </ul>
<input type="checkbox"/>	<p>Make sure any temp or hidden profile groups not in use are free of base paths and mapping. This is mainly a concern in conversions or upgrades, or anytime you use temporary profile groups to complete a set-up. Best practice is to hide profile groups not in use. This is effective in terms of what users can see, but does not go far enough. You should clear base path and UNC field entries for any such group. This eliminates unnecessary processing and cuts down on possible errors.</p> <ul style="list-style-type: none"> <li>▶ <b>Where:</b> Select <i>Add/Edit</i> from the <i>WDADMIN Profile</i> pull-down menu. When the <i>Edit &gt; Profile Groups</i> dialog appears, select the hidden profile group, then click . Base path and UNC settings can then be cleared in the <i>Edit Profile Group</i> dialog.</li> </ul>
<input type="checkbox"/>	<p>For each profile group, make sure the <i>Properties</i> fields (<i>Auto Path Only</i>, <i>Enable Salvage</i>, et al.) are correctly set.</p> <ul style="list-style-type: none"> <li>▶ <b>Where:</b> Profile group properties are set in the right-side <i>Properties</i> section of the <i>Edit Profile Group</i> dialog, accessed as noted above.</li> </ul>
<b>Fields</b>	
<input type="checkbox"/>	<p>Populate all fields with valid data.</p> <ul style="list-style-type: none"> <li>▶ <b>Where:</b> Field codes can be imported, via the <i>Import &gt; Field Tables</i> dialog. Select <i>Import</i> on the <i>WDADMIN Fields</i> pull-down menu. You can also add field codes individually via <i>Edit &gt; Field Tables</i> dialogs, accessed by selecting <i>Add/Edit</i> on the <i>Fields</i> pull-down menu, then selecting a profile group when the <i>Select Profile Group</i> dialog appears.</li> </ul> <p>In the <i>Edit &gt; Field Tables</i> dialog, click on any left-side field button to access the table for that field:</p>

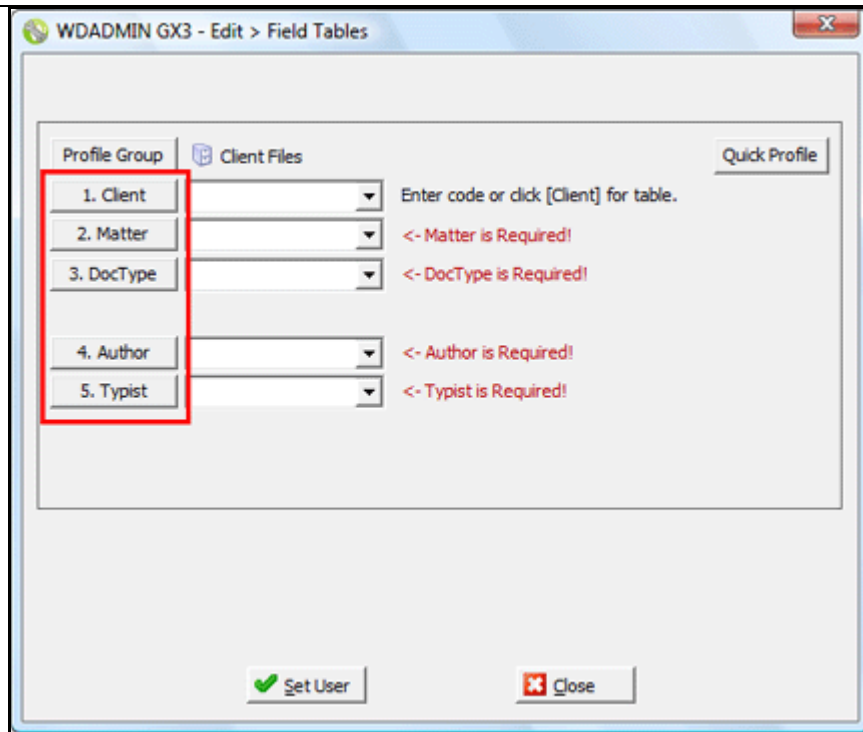


FIGURE 3: Click field buttons to access field tables in Edit > Field Tables dialogs.

- Make sure field data is properly indexed. This is mainly a concern in conversions or upgrades. Best practice is to test the integrity of field tables via the *Repair* function

► Where: This is done in the *Fields > Repair* dialog, as follows:

- a. Select *Repair* from the WDADMIN *Fields* pull-down menu.
- b. When the *Select Profile Group* dialog opens, select the profile group in which you are testing fields. That opens the *Fields > Repair* dialog.

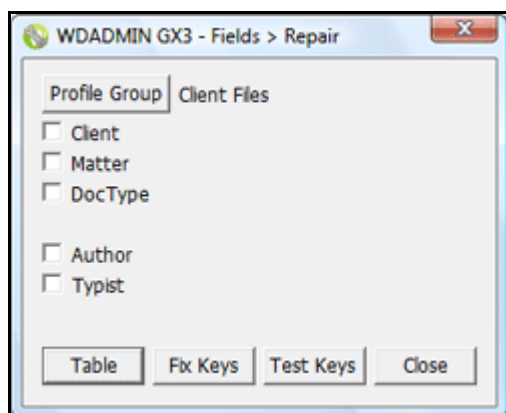

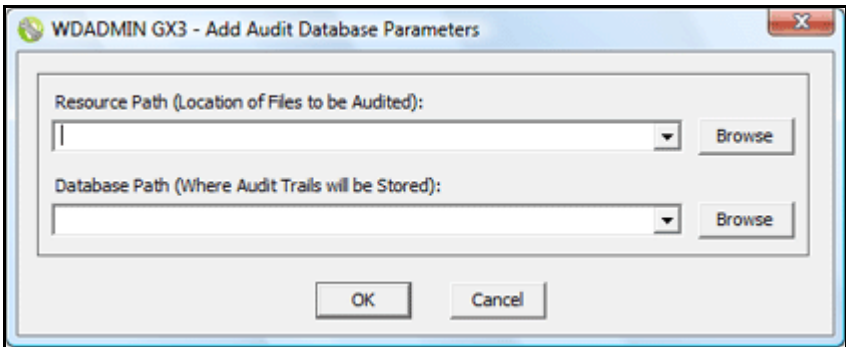



FIGURE 4: Testing fields, in the Fields > Repair dialog.

- c. Click checkboxes to select fields for testing, then click Test Keys.

<b>Audit Trail</b>	
<input type="checkbox"/>	<p>Define and create audit trails, for each network resource in use.</p> <p>▶ <i>Where:</i> Audit trails are configured in the <i>Audit Trail Paths</i> dialog, accessed by selecting <i>Configure</i> from the <i>WDADMIN Audit Trails</i> pull-down menu.</p>
<input type="checkbox"/>	<p>Make sure audit trails files are in locations that are properly mapped, and to which all users have full rights.</p> <p>▶ <i>Where:</i> This is part of the audit trail definition process. In the <i>Audit Trail Paths</i> dialog, accessed as noted above, click  in the toolbar. That opens the <i>Add Audit Database Parameters</i> dialog:</p> <div style="text-align: center;">  </div> <p><i>FIGURE 5: The Add Audit Database Parameters.</i></p> <p>This same dialog - retitled as <i>Edit Audit Database Parameters</i> - is available for existing audit trails. Just click an audit trail to select it in the <i>WDADMIN Audit Trail Paths</i> dialog, then click  in the toolbar.</p>
<input type="checkbox"/>	<p>Make sure audit-trails are root-defined, and that one audit trail is configured for each system resource.</p> <p>▶ <i>Where:</i> Audit trails are configured in the <i>Audit Trail Paths</i> dialog, accessed as noted above.</p>

## 2.2 **WDINDEX**

### 2.2.1 Accessing the Indexer

It's assumed here that you are working on the designated PC used for indexing at your firm. There are a couple ways to access the indexer. You could open the *WDINDEX* applications in the *Worldox* program folder on the network server. The better way – the way we recommend – is to always run a mirrored copy of the indexer.

To do that, type this into the *Run* line under your *Windows Start* menu:

*Drive:\networklocationofworldox\wdmirror.exe /wdindex*

(Drive being the network drive on which *Worldox* was installed.)

You can also use a UNC in the *Run* field:

`\\unc\of\networklocation\wdmirror.exe etc`

Running the indexer mirrored avoids conflicts and interruptions in indexing.

- Make sure that Indexer storage locations are properly mapped, and that all users have full rights to these locations.

► *Where*: Indexer file storage can be checked per drive in the main *Indexer* window:

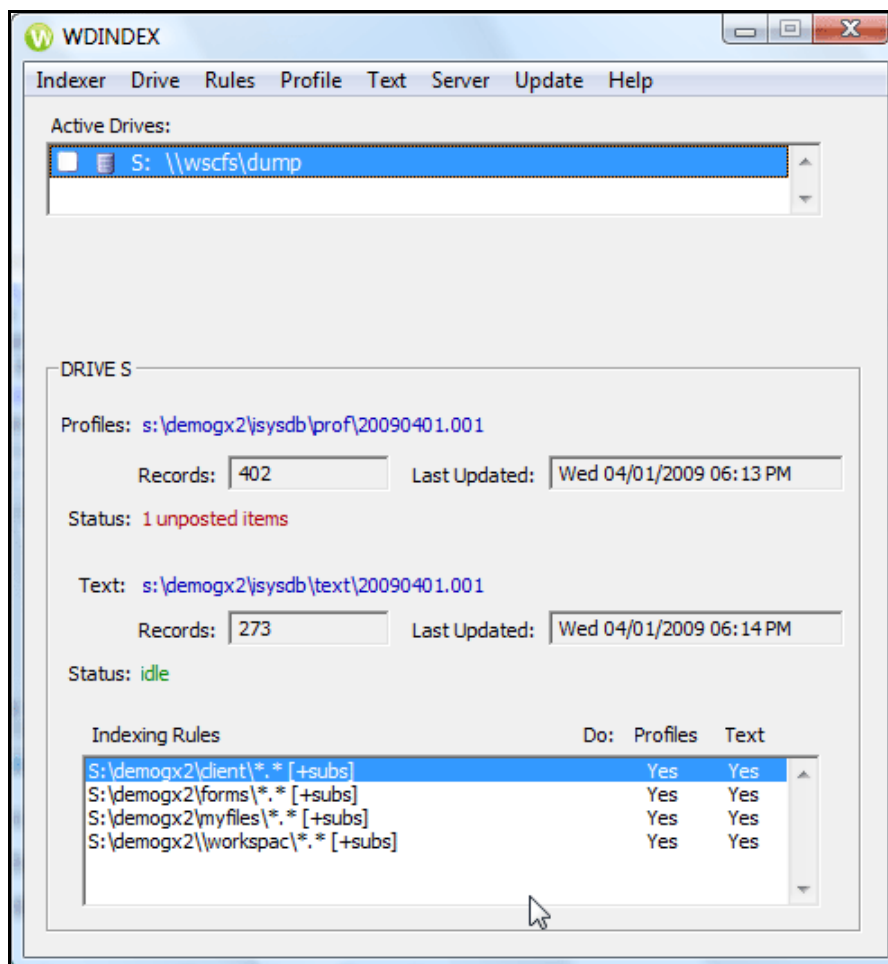




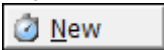
FIGURE 6: The Indexer main window.


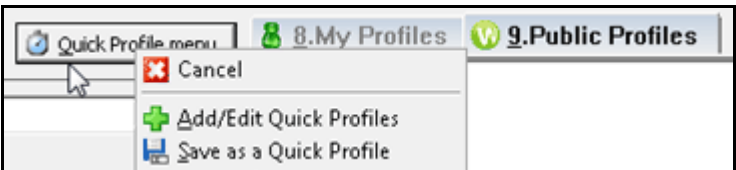
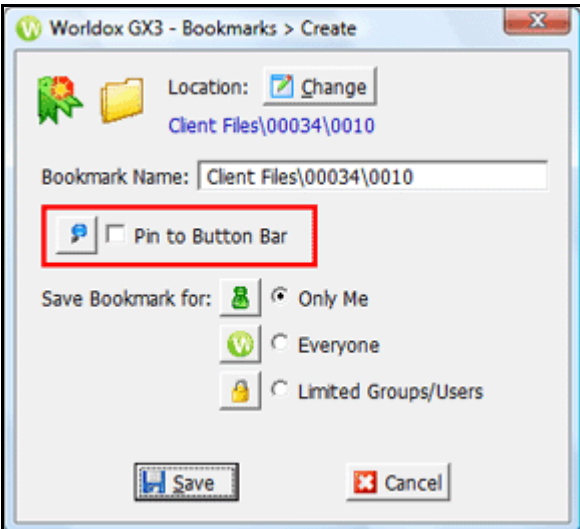
Here you see a list of all drives that have associated base paths defined. Worldox users must have access rights (full access preferable for the *Profiles* folder, at least read-only and execute for the *Text* folder) to folders where Indexer files are stored.


- If the site has a large “legacy” data store, make sure that this is its own database, separate from live data.

<input type="checkbox"/>	Check to see that the PC used for indexing has the proper mail client installed. For example, if a site uses Outlook, the Indexer PC itself also has to have Outlook installed.
<input type="checkbox"/>	<p>Make sure that the Indexer PC has an adequate supply of RAM and enough free local disk space, and that it is setup properly.</p> <p><b>Note:</b> At too many sites, clients pick the oldest, most outmoded machines to serve as indexers. That's a short-sighted approach, and can lead to endless problems. Part of installation is making sure your customer understands the need for speed and for room to grow in their indexers.</p>
<input type="checkbox"/>	Make sure the Indexer has a valid Windows login and necessary rights - to every drive and folder in which documents and other Worldox-related files are stored.
<input type="checkbox"/>	<p>Check Indexer "rules". Are they correct?</p> <p>▶ <i>Where:</i> Indexer rules are defined per drive, and list in the <i>Indexer Rules</i> field at the bottom of the main <i>Indexer</i> window. To add rules, click a listed drive to select it, and then select <i>Add</i> from the <i>Rules</i> pull-down menu. You can also edit individual rules by selecting them in the <i>Indexer Rules</i> field, then selecting <i>Edit</i> from the <i>Rules</i> pull-down menu.</p>
<input type="checkbox"/>	<p>Add indexer shortcuts. (optional)</p> <p>The mirrored access specified in Section 2.2.1 for running the indexer mirrored via the <i>Run</i> field:</p> <p style="padding-left: 40px;">The <i>Drive:\networklocationofworldox\wdmirror.exe /wdindex</i></p> <p style="padding-left: 40px;">(<i>Drive</i> = the drive which Worldox was installed.)</p> <p>Can be more specific. You can both access and start the indexer using this syntax in the run field:</p> <p style="padding-left: 40px;"><i>Drive:\networklocationofworldox\wdmirror.exe /wdindex /s</i></p> <p style="padding-left: 40px;">(S= the drive being indexed. Multiple drives can be specified, separated by “;”)</p>

### 2.3 Worldox Client

<input type="checkbox"/>	<p>Create the basic set of search templates.</p> <p>▶ <i>Where:</i> New search templates can be created by clicking  in the Worldox toolbar.</p> <p>When the <i>Search Templates</i> dialog opens, click  in the toolbar.</p>
<input type="checkbox"/>	<p>Create the basic set of quick profiles.</p> <p>▶ <i>Where:</i> Quick profiles are created in WDADMIN, in the <i>Edit &gt; Quick Profiles</i> dialog. Start WDADMIN, and then select <i>Quick Profiles</i> from the <i>Edit</i> pull-down menu. When the <i>Edit &gt; Quick Profiles</i> dialog opens, click  at the lower left. You'll then select a profile group and fill out the <i>New Quick Profile</i> dialog form.</p>

	<p>You can also create quick profiles while profiling documents. Just click  <b>Quick Profile menu</b> at the top of the profile form:</p> 
<input type="checkbox"/>	<p>Create any basic bookmarks needed, and pin to the toolbar as appropriate.</p> <ul style="list-style-type: none"> <li>▶ <b>Where:</b> To create a bookmark, select <i>Create New</i> from the <i>Bookmarks</i> pull-down menu in Worldox. Two or three additional dialogs appear, depending on the type of bookmark you are creating. As you save the new bookmark, a final, <i>Bookmark &gt; Create</i> dialog appears, offering the choice to pin that bookmark to the Worldox screen frame:</li> </ul>  <p style="text-align: center;"><i>FIGURE 7: Pinning a new bookmark to the Worldox toolbar.</i></p>
<input type="checkbox"/>	<p>Check the feature set ... which Worldox features/tools are available to users at this site? Some features may have to be hidden or enabled globally, while many others will be user configurable. It depends completely on what features the business wants users to have, and whether all users can see all possible features.</p> <ul style="list-style-type: none"> <li>▶ <b>Where:</b> Worldox features can be enabled or disabled within WDADMIN, on the <i>Security &gt; Groups</i> dialog, also in a variety of configuration files stored in the Worldox network folder.</li> </ul>
<input type="checkbox"/>	<p>Test email integration. Does it work as configured?</p>
<input type="checkbox"/>	<p>Test how key applications integrate with Worldox. For each application, test <i>Save</i>, <i>Audit</i>, <i>Search</i>, and <i>Open</i> a new file.</p>

- Make sure default “Styles” are defined for whatever file lists will be in use at the site.
- ▶ Where: Styles are the appearance of various Worldox screen objects, including the width of the left-side path tree, visible work list columns and their size/order, what displays in column headers, and more. Once you have a certain work list set as it should appear, save that style by clicking  in the small toolbar to the right of the *Location* field:

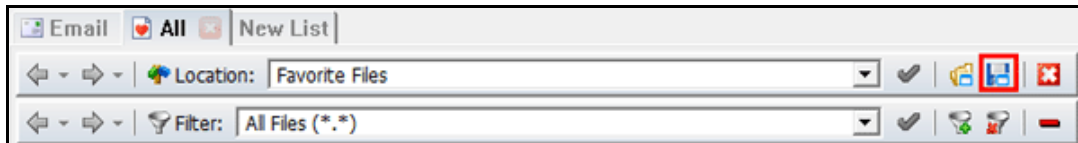


FIGURE 8: Saving styles.

That opens the *Save Window Styles* dialog, where you can specify which style elements to save:

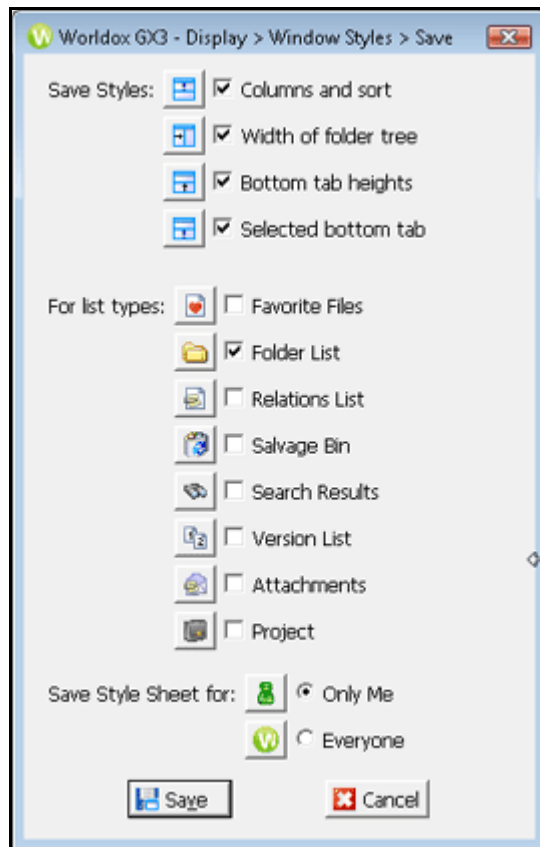


FIGURE 9: The *Display > Window Styles > Save* dialog.

## **APPENDICES**

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