



Worldox GX3 and GX4

Switching from a Network Drive Installation to a UNC Installation

TECH NOTES AND TUTORIALS

Version 1.0

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INTRODUCTION

This document provides steps for switching from an existing Worldox installation based on drive letters to a UNC system. One reason you may want to use a UNC system is to protect files from ransom ware such as CryptoWall. CryptoWall malware can corrupt and encrypt documents on a network if a site is infected with this virus. One way to prevent CryptoWall is to switch to a pure UNC setup (no mapped drives). Currently, based on the information we have regarding these viruses, they only affect mapped network drives. If your site does not use any mapped drives it should dramatically reduce your risk of being affected by CyptoWall and similar types of ransom ware. For details about these viruses, see the Worldox Knowledge Base article entitled, *Documents Become Corrupt or Encrypted on the Network Due to CryptoLocker or CryptoWall Malware*.

Note: After you have finished switching to a UNC based system and you no longer need network drive letters for anything else, you may want to remove them from the site's login scripts and un-map them on any PCs that still have them mapped.

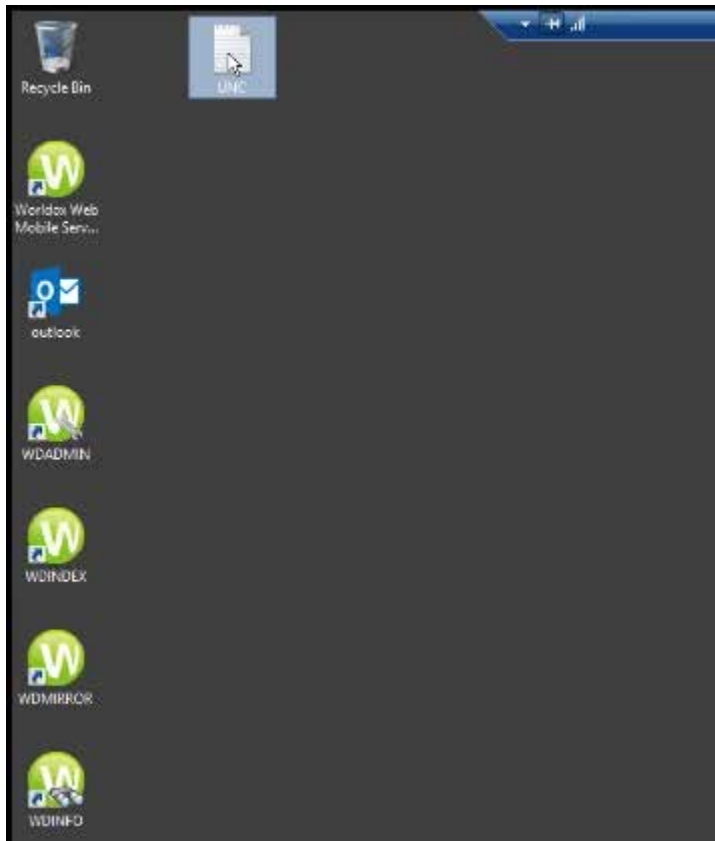
REQUIREMENTS

- § The system change must be made during downtime. Please ensure that no users are using the system. Please also shut down Worldox and all related applications (Worldox Web, all connectors, WDINFO, WDADMIN, etc.) .
- § Use the Worldox Indexer (WDINDEX.exe) to do a Database Init and Build. This change requires an Init and build of the Profile and Text Databases, so please factor in time requirements for this during planning.
- § For GX3, please run the WDUPDATE.exe utility. For GX3 sites, you need to run WDUPDATE and get on current code before making this change.
- § Identify the Cabinets that need to be changed.
- § Document which drive letters are mapped to which shares.
- § Identify Audit Trail and database folder locations because you will need to point to them from UNC setup.
- § Identify any add-ons that the site is using (Worldox Web, Connectors, etc.)
- § Citrix RDS for remote access
- § Identify any shortcuts that use a /cp switch. You'll need to convert it from drive letter-based system to a UNC system.
- § The Worldox Client. Plan whether to reinstall on each PC or push out to a new WDMIRROR.INI file.
- § Identify any new global folder-based bookmarks.
- § Are the network drive letters used for anything else besides Worldox? Make sure that legacy apps do not also depend upon this drive letter.
- § Review the Indexer's Schedule.

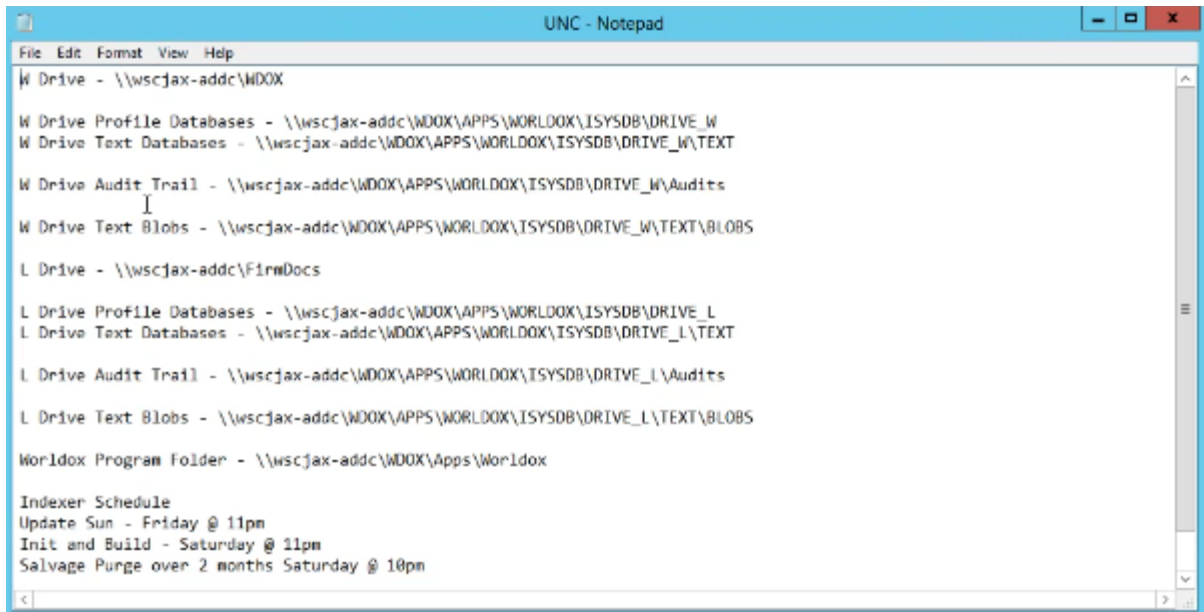
- § Ensure that the site has a good backup.
- § Schedule downtime for the switch to the UNC installation.

REPLACE DRIVE SHORTCUTS WITH UNC PATHS

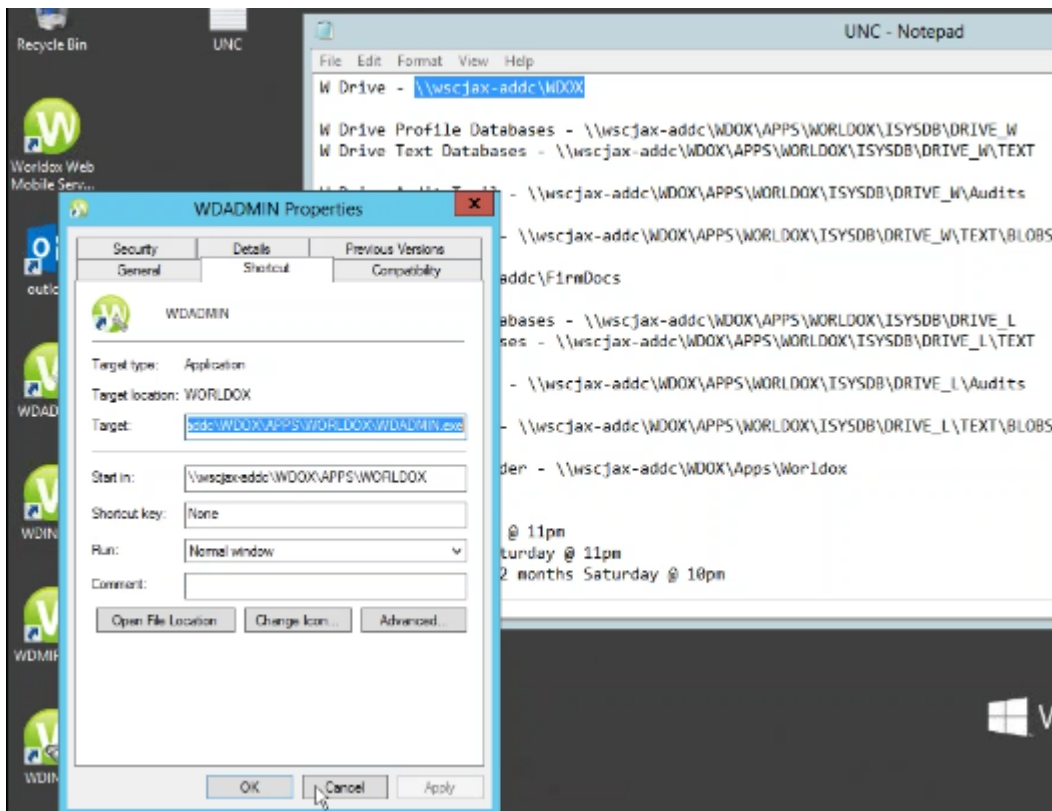
1. Ensure you have met all the requirements of the planning phase. For example, shut down Worldox, connectors, Worldox Web, etc.
2. If at a GX3 site, run WDUPDATE.
3. From the site's Worldox Indexer PC, change properties of shortcuts to Worldox applications (WDADMIN, WDINDEX, WDINFO) so they point to UNC locations.



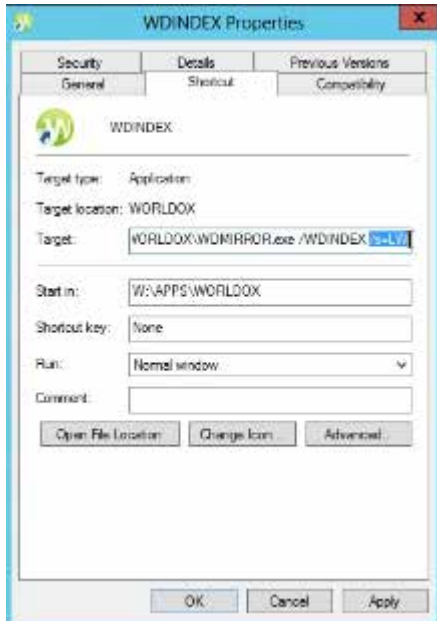
- In Notepad, enter UNC locations into a text document. During the planning phase, you should write down all of the locations and save them into a text document. An example is below:



- Copy drive information to shortcuts. For example, in the text document, copy the W drive.
- Right-click the WDADMIN shortcut and select Properties. In the Target and Start in fields, remove the "W:" and replace it with the share name. Click **Apply** to make this a UNC shortcut.



7. Right-click the WDINDEX shortcut. Replace the "W:" with the share name. In the Target field, remove the "/s=W" that is at the end of the path for now. After you have finished the process of switching to UNC you can return to this to edit it. You can enter the correct syntax for UNC's you want to index. Click **Apply**.



8. Right-click the WDINFO shortcut. Replace the "W:" with the share name. Click **Apply**.

EDIT THE WORLDOX.INI TO POINT TO A RELATIVE PATH OR UNC

In the Worldox.INI file, edit the Eafile section so that Home does not point to a mapped drive:

```
[Eafile]
Home=
```

It should be either a relative path

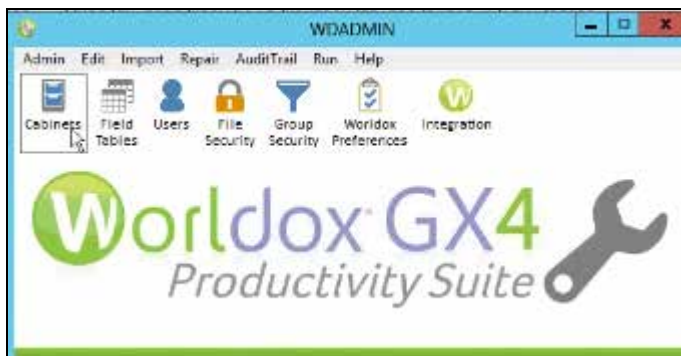
```
[Eafile]
Home=.\SHARED
```

Or an absolute path point to the UNC for the SHARED folder

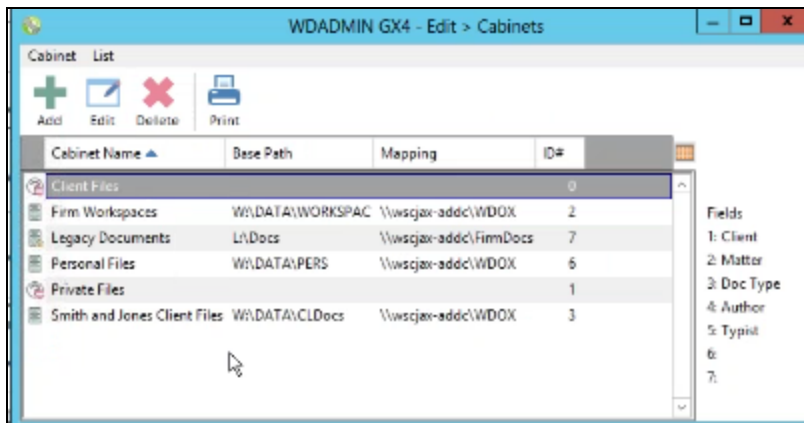
```
[Eafile]
Home=\\SERVER\SHARE\WORLDOX\SHARED
```

EDIT CABINET PATHS IN WDADMIN

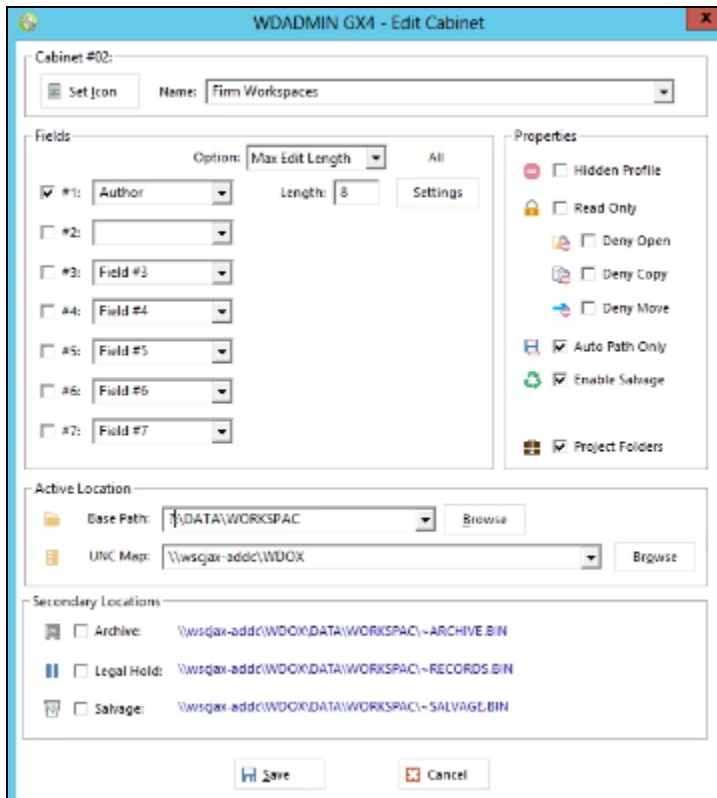
1. Now that you have changed shortcuts to be UNC-based, start WDADMIN. Edit Cabinets to be UNC-based rather than drive letter-based.



In the following example, production cabinets point to the W drive and the legacy cabinet points to the L drive. (Drive letters will of course vary from site to site.)



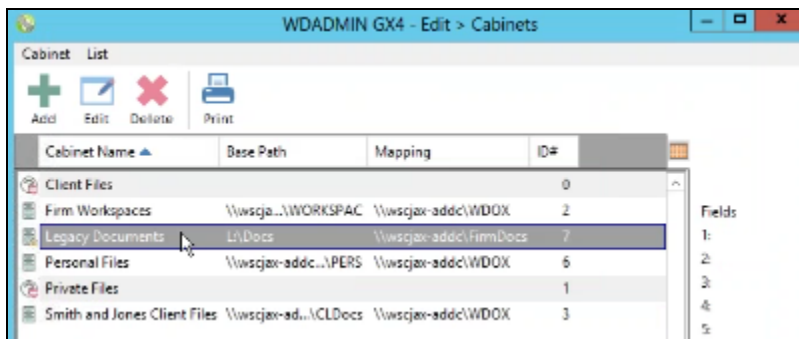
- In the Firm Workspaces cabinet, for Base Path, the letter W is replaced with a ? (question mark). Save your changes.



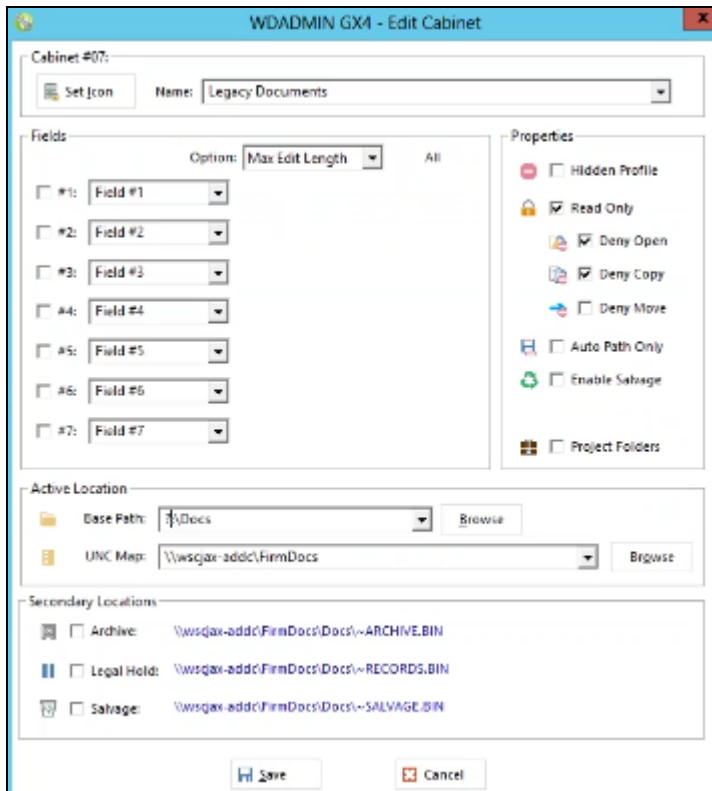
- The UNC Map should already have the server and share name that the drive letter is mapped to.

Note: If a site's cabinet has no path in the UNC Map field, please be aware that favorite files for the user's personal INI file would be saved based on the letter drive. When you cut them over, the favorites would disappear.

- Go to the other Cabinets that are mapped to the W drive and replace the W with a question mark. In the following example, all the production drives that used W have been switched over to use a question mark. Save your changes.

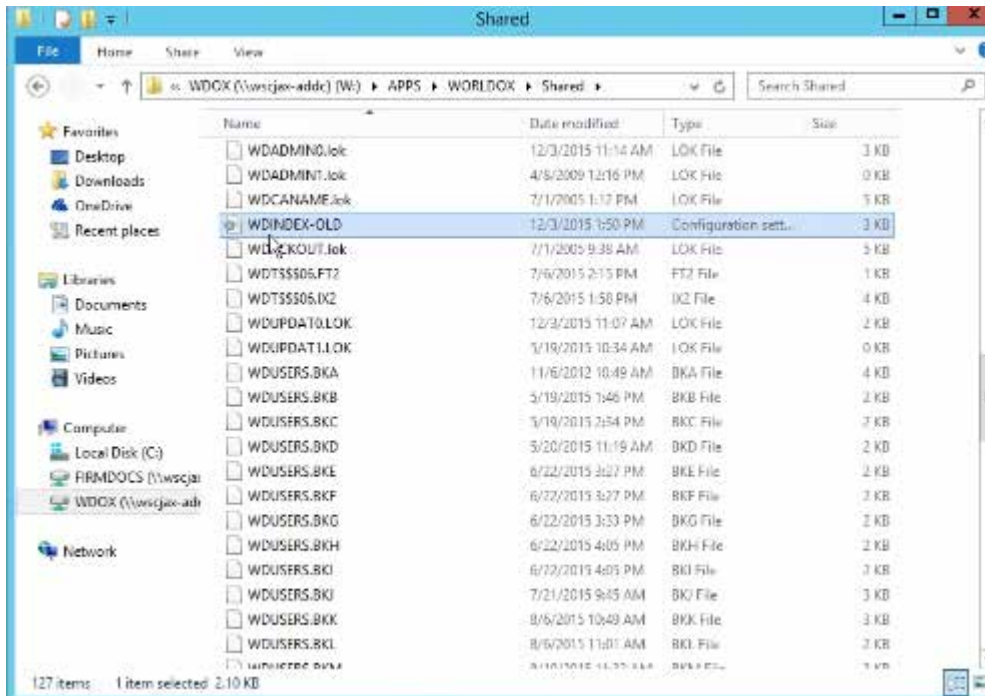


5. If you want to, you can have a mixed environment. For example, you could make production cabinets be UNC-based and leave the Legacy cabinet with a letter drive. However, in this example, the L drive for legacy is changed to use a question mark. Save your changes.



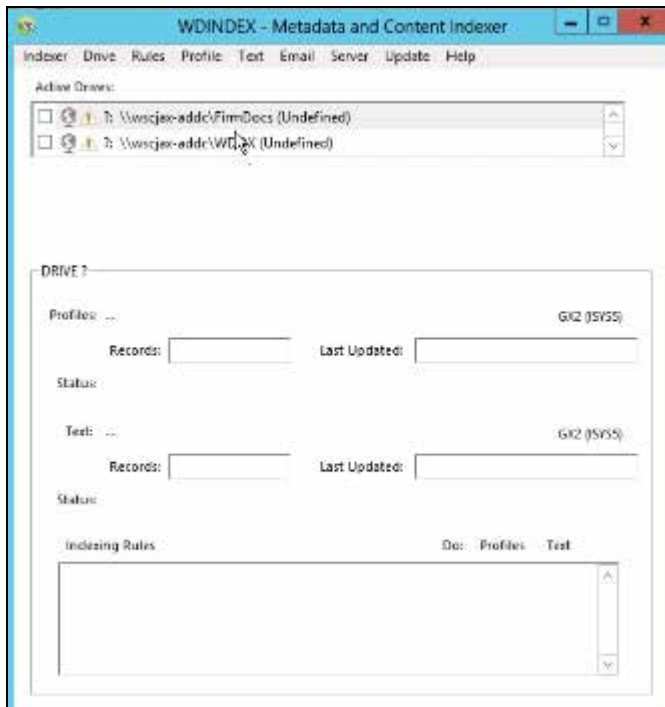
SET PROPERTIES FOR PROFILE AND TEXT DATABASES IN WDINDEX

1. Next, navigate to the Worldox folder on the site's server. Go to the Shared folder and find the existing WDINDEX.INI file and rename it to WDINDEX-OLD.



When you start the indexer, it will create a new WDINDEX.INI. Then you can re-set properties. The only thing in that WDINDEX.INI file will be information that pertains to new UNC environment and you won't have information left over from old drive letter-based system.

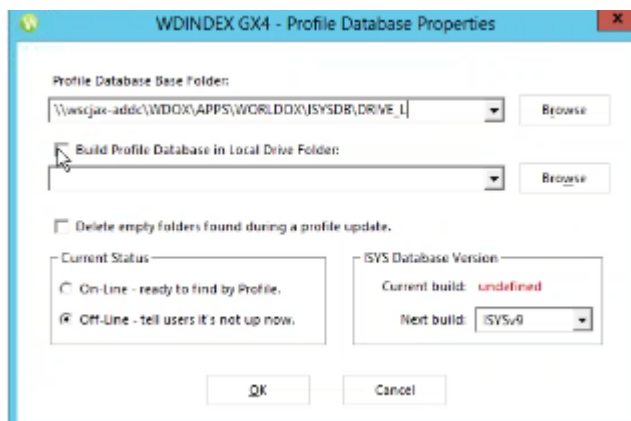
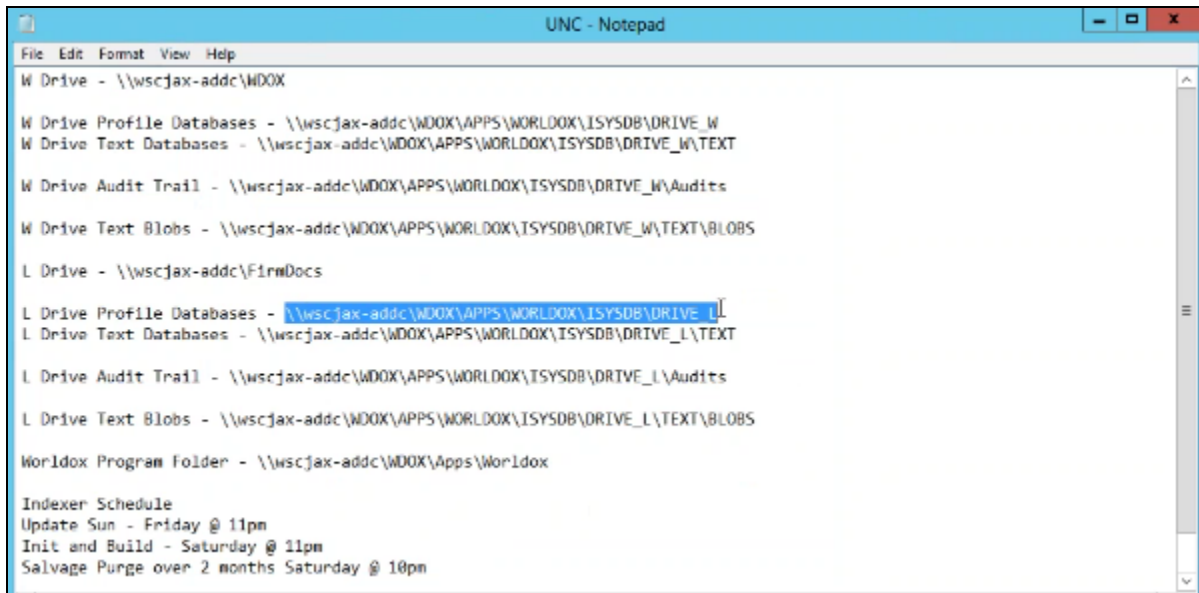
- Next, open WDINDEX to set properties for profile and text database locations. Please note that there are no drive letters shown in the following example, just the UNC's.



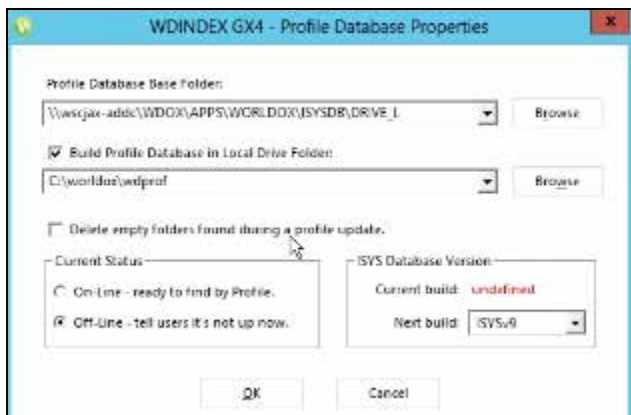
- Set up the profile text properties for each of these resources. In this example, there are two resources, but your site may have one or more than three and so on.
- Check the Firm Docs drive and from the Profile menu select **Properties**.



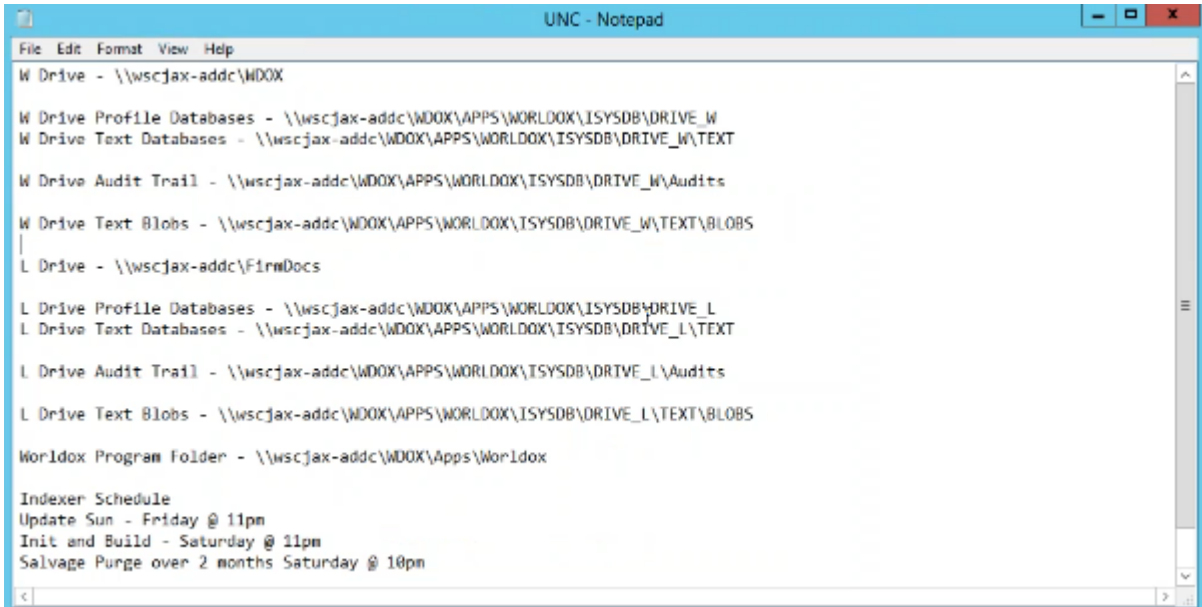
5. Instead of using the default, open the text document where you saved drive information. In this example, copy the L drive profile databases path from the text document and copy it into the WINDEX Profile Database Properties dialog.



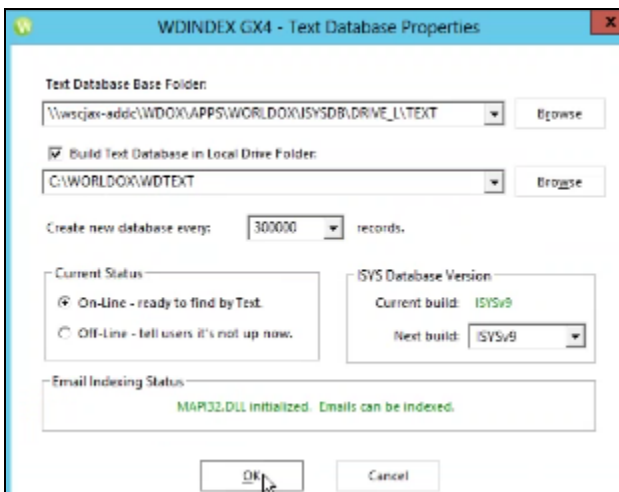
6. Check the **Build Profile Database in Local Drive Folder** option and browse to the WDPROF folder.



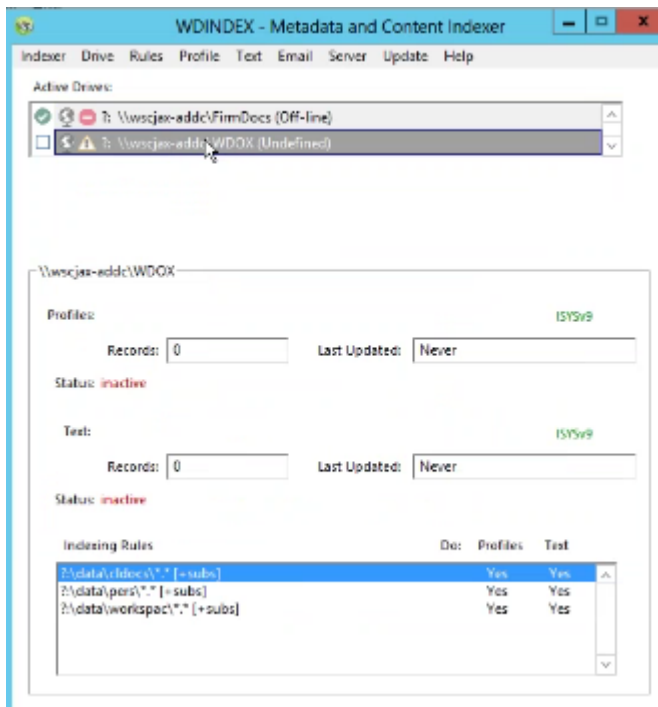
7. Ensure that ISYSv9 is selected as the **Next build** option. Click **OK**.
8. From the Indexer's Text menu select **Properties**. You can view the text properties path and then validate it by checking your text document (L Drive Text Databases in the following example).



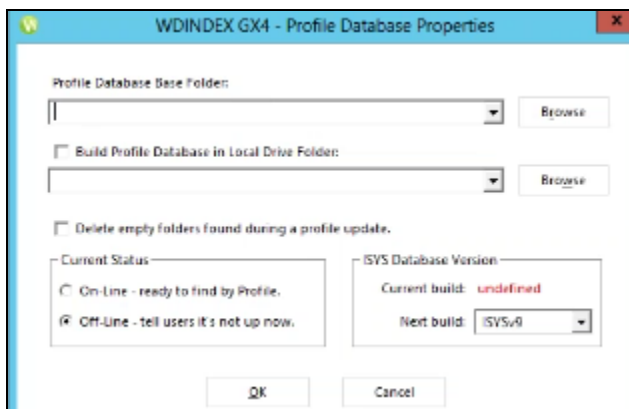
9. Check the **Build Text Database in a Local Folder** option and ensure that ISYSv9 is selected as the Next build option. Click **OK**.



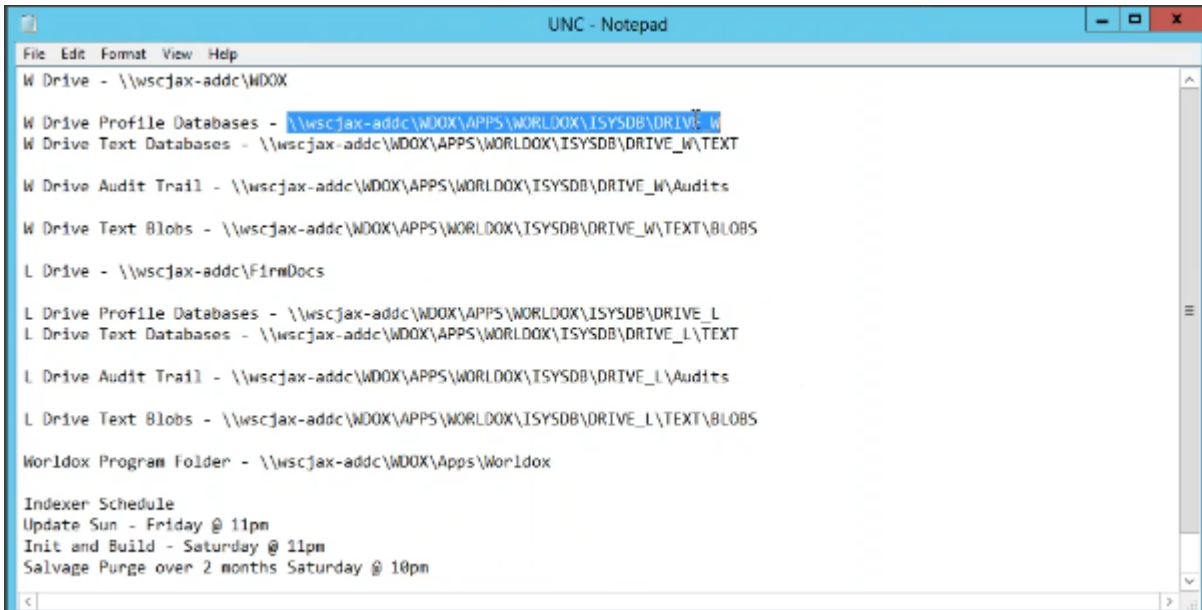
10. Now do the same thing for the old W drive which is now the new WDOX.



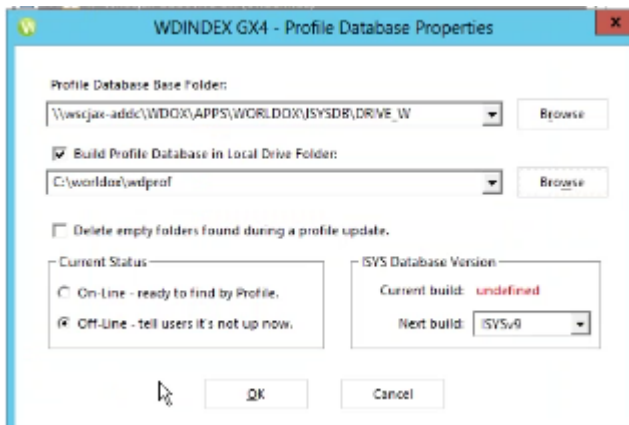
From the Profile menu, select Properties. Remove the default path.



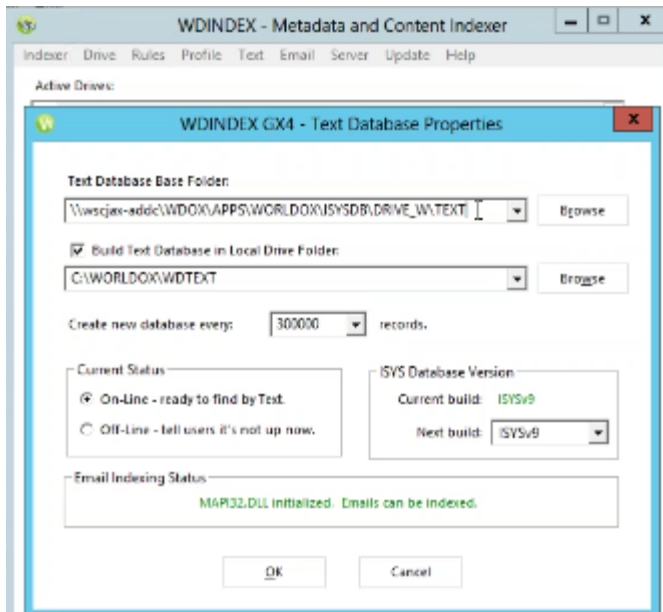
- Copy the W Drive Profile Databases path from the text document and paste it into the Profile Database Base Folder field.



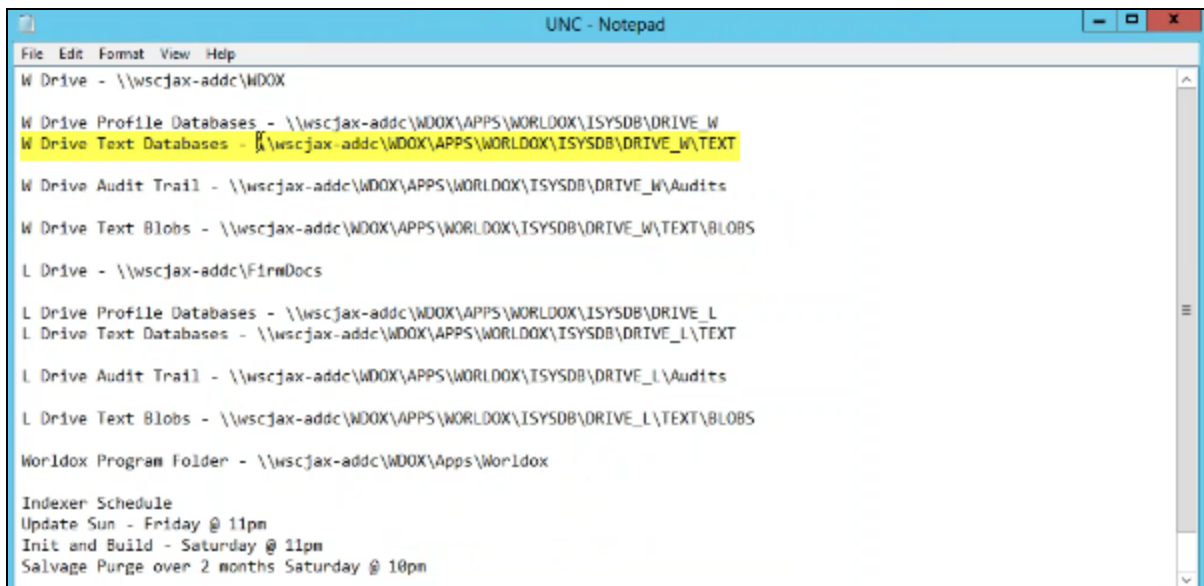
- Check the Build Profile Database in the Local Drive Folder option and browse to the local WDPROF (C:\worldox\wdprof in this example). Ensure that ISVSv9 is selected as the Next Build option and click OK.



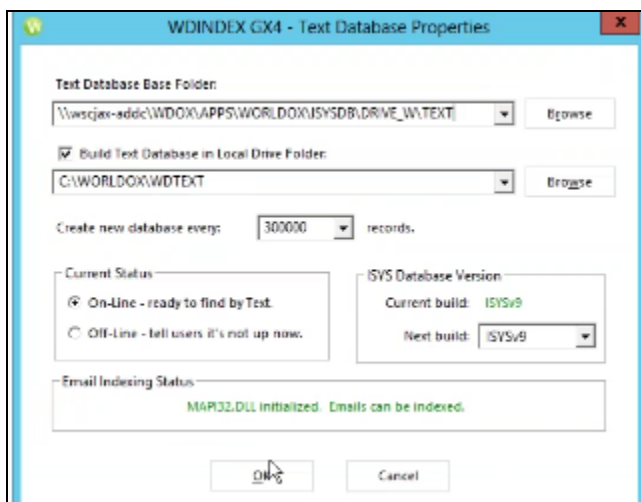
- From the Text menu, select **Properties**. The correct path should be in the Text Database Base Folder path already.



However, you can refer to your text document to validate the path (W Drive Text Databases).



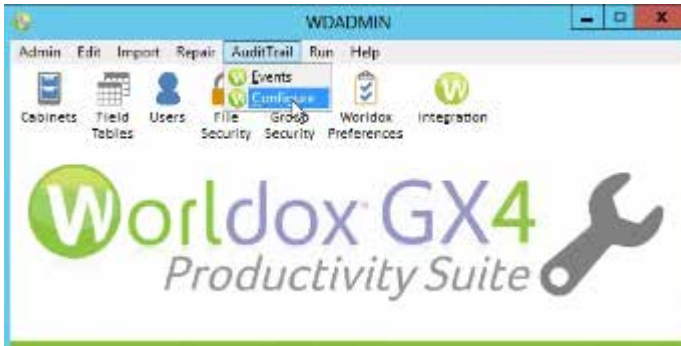
14. Check the **Build Text Database in Local Drive Folder** option and check the default path. Ensure that ISYSv9 is selected as the Next Build option and select **OK**.



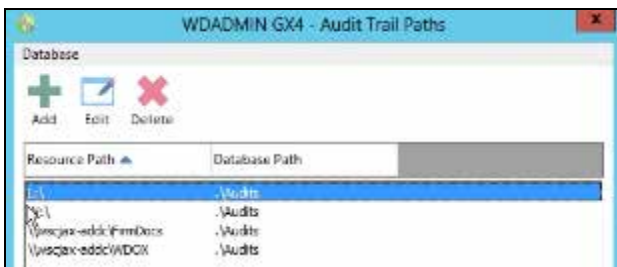
Now you have created the properties. The reason for this is because there are sub-folders under your database structure that contain files you will need to use going forward. One is the Audit trail folder. In GX4 only, the other is the network Blobs folder.

VERIFY THE AUDIT TRAIL CONFIGURATION

1. Close WDINDEX and restart WDADMIN. Verify the Audit trail configuration. From the AuditTrail menu, select **Configure**.



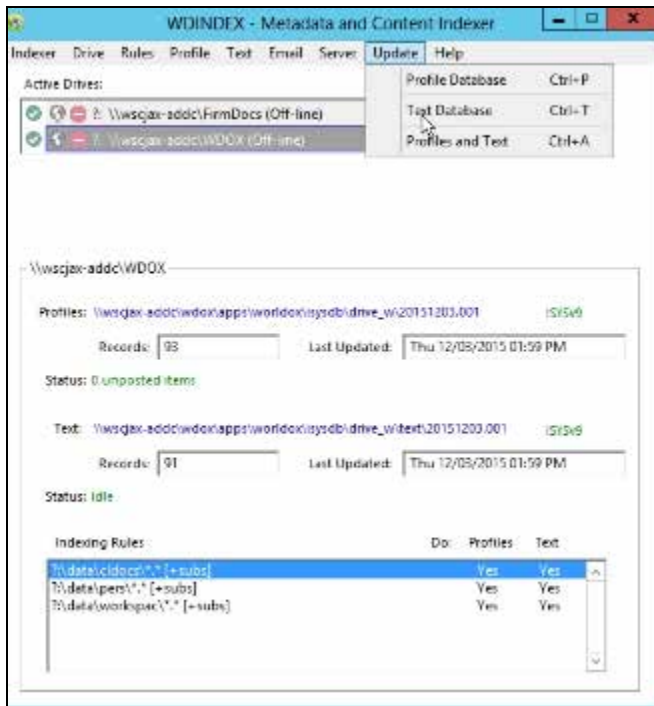
2. You can view the UNC's that W and L drives used to map to.



3. Highlight the L and W drives and select the **Delete** option for both because you no longer need those resources.
4. Then for the new UNC values listed, set the proper UNC location of the existing audit trail folder for that resource.
5. Exit WDADMIN and start WDINDEX so you can run the Init and Build of the databases.

INITIALIZE AND CREATE PROFILE AND TEXT DATABASES IN WDINDEX

1. Check the Active Drives. From the Update menu, select **Profiles and Text**.

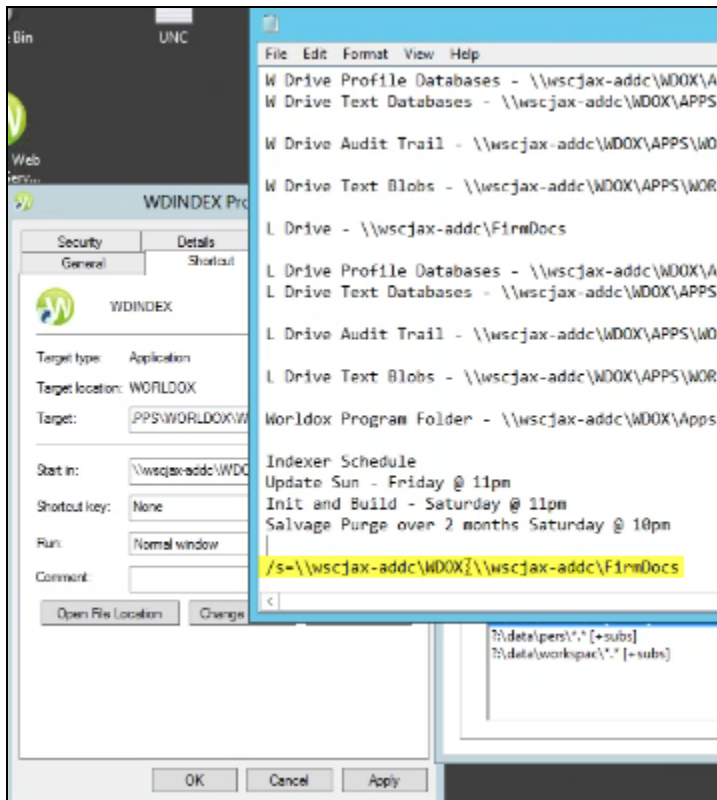


2. Select **Initialize and Create Profile and Text databases** to build new databases that are based upon the UNC s (not mapped drives). At a customer site, this may take hours due to the amount of files they have.

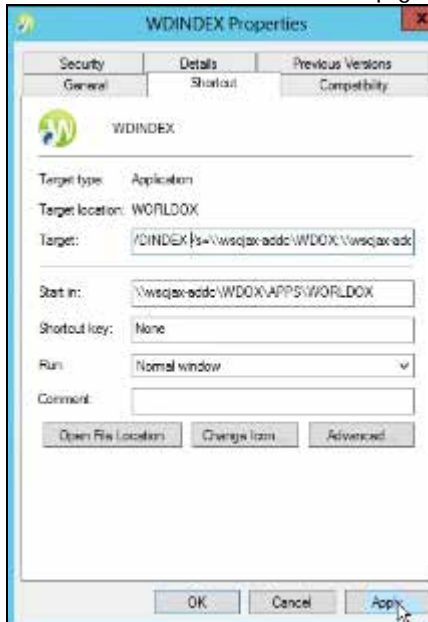


EDIT SHORTCUT PROPERTIES

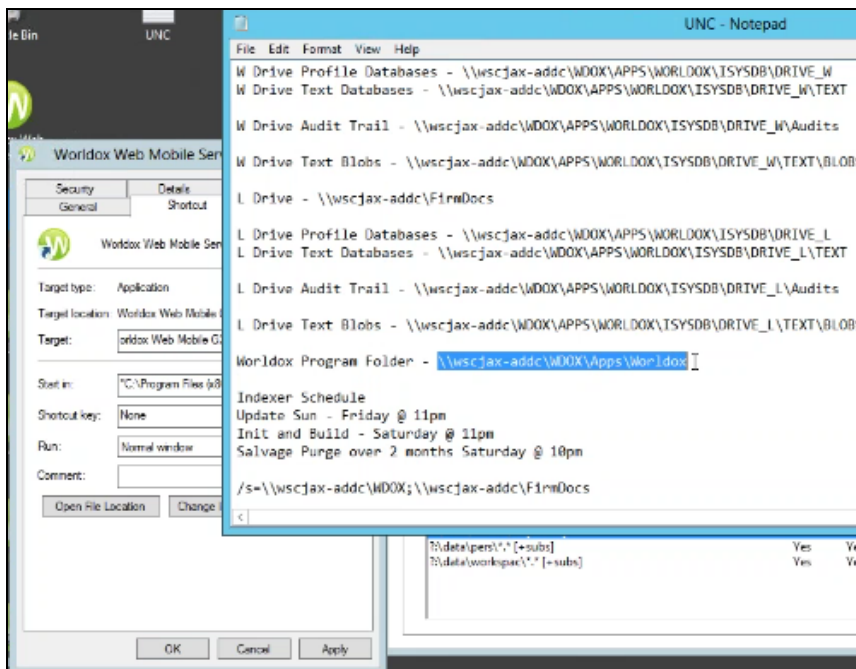
1. While the databases are running, you can tweak shortcut properties. For example, right-click WDINDEX. You can add back the /s= network shares information. In the following example, it is selected in the text document. Note: When working with UNC's, you need to separate them with a semi-colon (;).



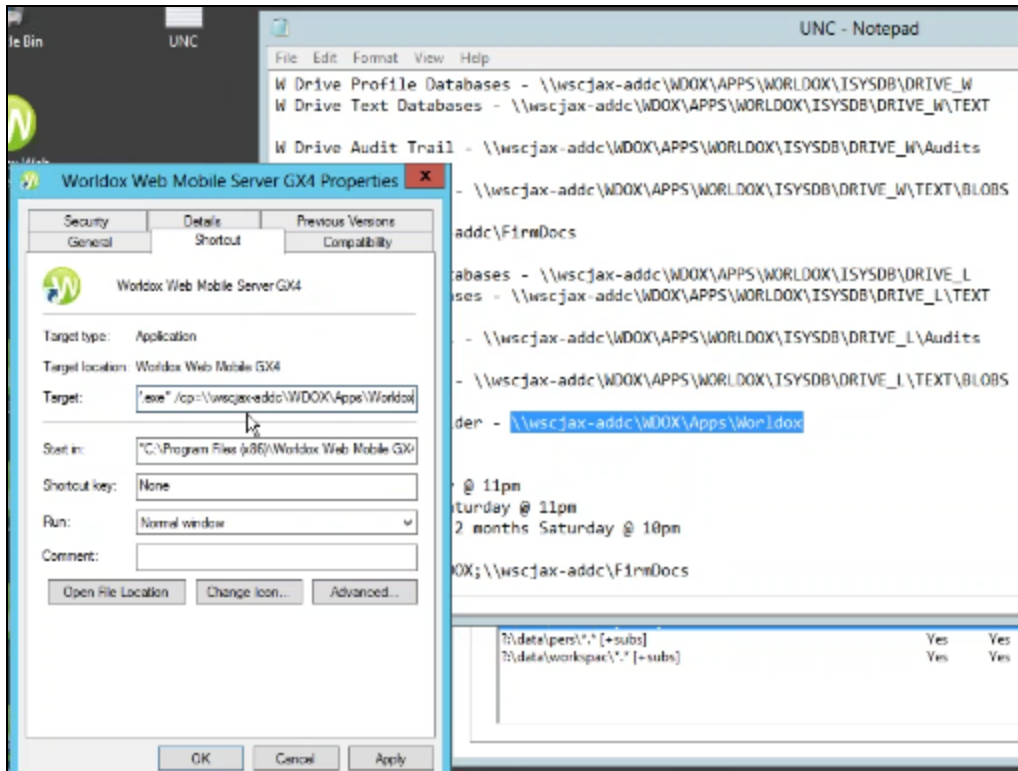
- Copy and paste the path into the WDINDEX Properties Shortcut's Start In field. Click **OK**. If you also have this shortcut in the Startup group on the Indexer PC, please be sure to also modify it there.



- Please also note that for shortcuts that use /cp switches (for example, Worldox Web), it uses a proxy. Right-click Worldox Web and select Properties. In the Target field where you see /cp, replace that with the UNC. In the text document, highlight the Worldox Program Folder path. Copy it.



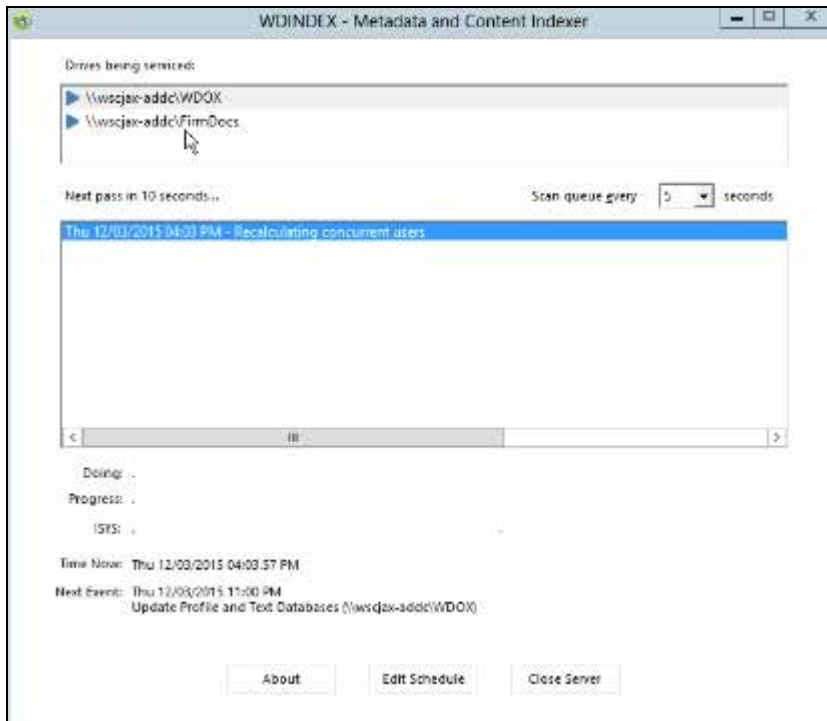
Then paste it into the Start in field.



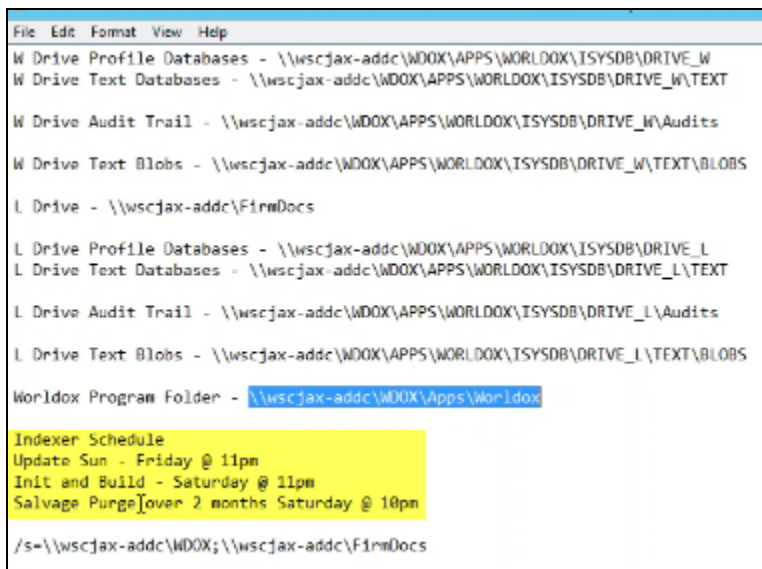
4. The next time you start the Worldox Web proxy on the Indexer, it will for the copy of Worldox on the network based on the UNC location and not based upon the drive letter location. Click **Apply**. If you have any other shortcuts using the /cp switch, modify those as well. (Some might be Citrix RDS, Worldox Enterprise backends, etc.)

RESTART THE INDEXER IN SERVER MODE

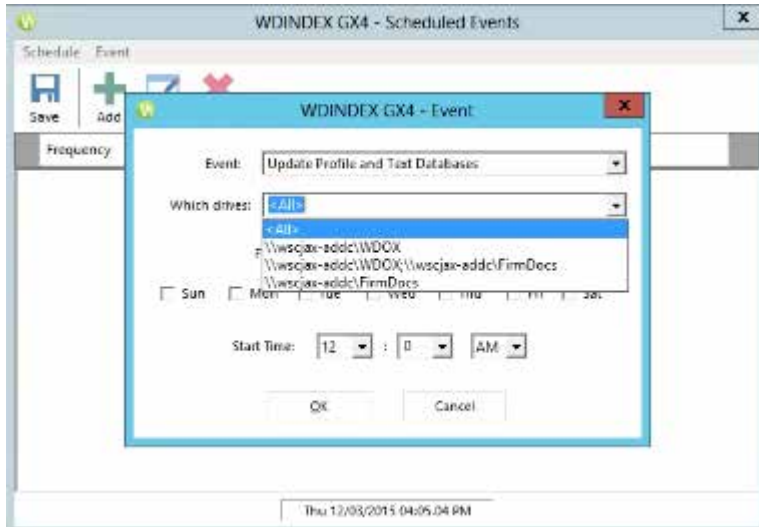
1. Return to the Indexer. If databases have been built, shut it down. Then restart the Indexer in Server mode to check those two resources. In the following example, you can confirm that there are no drive letters anymore.



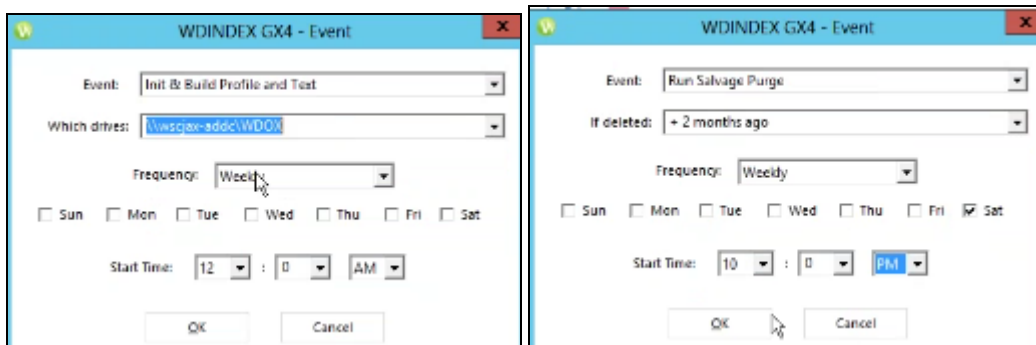
2. You can also select **Edit Schedule** and delete the old times. You can re-set times based on new environment. You can refer to your text document to see the old schedule.



3. You can then add those events to the Indexer's schedule. You might see choices for the Update Profile and Text Databases event if you are in the Server mode (as in the following example) because you are processing those resources. You would not see them in the main level for maintenance mode. If you are in Server mode, at this point, you can select the specific drive to process for a certain event.



4. Add other events for Init and Build Profile and Text and Run Salvage Purge.



Save your Indexer events.

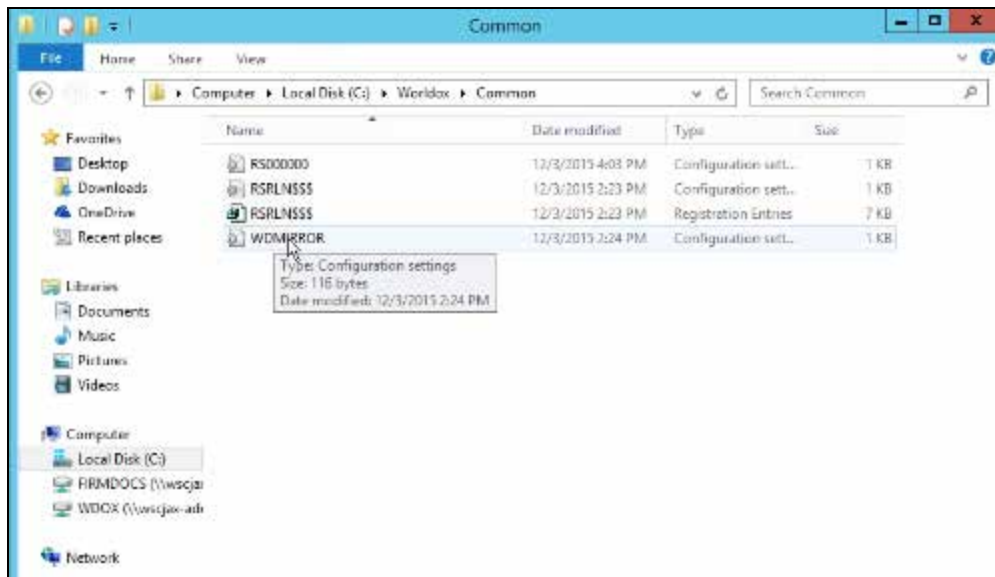
WORLDOX CLIENT SET UP

If you are at a client site where users are running Citrix or RDS, then you simply need to change the shortcut to be UNC-based.

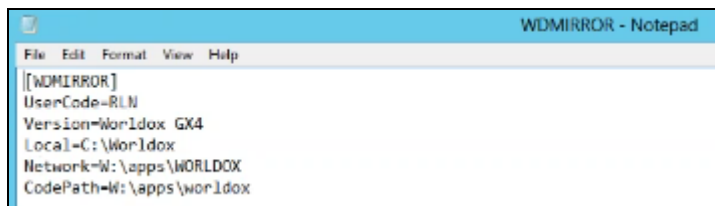
If the client is running Worldox installed locally on every computer, you can visit each computer and access the Start Run line and reinstall the Worldox client from the UNC location.

Or

You can access C:\Worldox\Common and open the WDMIRROR.INI file in Notepad.



Note the Network= and CodePath= lines.



Refer to your UNC text document and copy the Worldox Program Folder path.

```

UNC - Notepad
File Edit Format View Help
W Drive Profile Databases - \\wscjax-addc\WDOX\APPS\WORLDOX\ISYSDB\DRIVE_W
W Drive Text Databases - \\wscjax-addc\WDOX\APPS\WORLDOX\ISYSDB\DRIVE_W\TEXT

W Drive Audit Trail - \\wscjax-addc\WDOX\APPS\WORLDOX\ISYSDB\DRIVE_W\Audits
W Drive Text Blobs - \\wscjax-addc\WDOX\APPS\WORLDOX\ISYSDB\DRIVE_W\TEXT\BLOBS

L Drive - \\wscjax-addc\FirmDocs

L Drive Profile Databases - \\wscjax-addc\WDOX\APPS\WORLDOX\ISYSDB\DRIVE_L
L Drive Text Databases - \\wscjax-addc\WDOX\APPS\WORLDOX\ISYSDB\DRIVE_L\TEXT

L Drive Audit Trail - \\wscjax-addc\WDOX\APPS\WORLDOX\ISYSDB\DRIVE_L\Audits
L Drive Text Blobs - \\wscjax-addc\WDOX\APPS\WORLDOX\ISYSDB\DRIVE_L\TEXT\BLOBS

Worldox Program Folder - \\wscjax-addc\WDOX\Apps\Worldox

Indexer Schedule
Update Sun - Friday @ 11pm
Init and Build - Saturday @ 11pm
Salvage Purge over 2 months Saturday @ 10pm

/s=\\wscjax-addc\WDOX;\\wscjax-addc\FirmDocs

```

Return to the WDMIRROR.INI file in Notepad. Remove the W: from the Network= and CodePath= lines and paste in the Worldox Program Folder path.

```

WDMIRROR - Notepad
File Edit Format View Help
[WDMIRROR]
UserCode=RLN
Version=Worldox GX4
Local=C:\Worldox
Network=\\wscjax-addc\WDOX\Apps\Worldox
CodePath=\\wscjax-addc\WDOX\Apps\Worldox

```

Note: UserCode in the example simply indicates the last user of Worldox. If you have a user code in this file, it will not force Worldox to start up with that user.

You can save this WDMIRROR.INI file on your network and you can push this file out at login time. It can overwrite the existing WDMIRROR.INI file in the existing C:\Worldox\Common folder. When the Worldox Client starts, instead of looking for it in the drive letter location, it will look to the UNC location.

You do not have to change shortcut to WDMIRROR. That will remain the same. Only the WDMIRROR.INI in the Common folder should be changed (as it was in the previous steps).

Once this all completed the final step is to remove drive mappings from all the users workstations and the indexer(s). Depending on how the drives are mapped this maybe thru scripting or workstation visit. In most cases it will simply be reversing the process that currently maps the drives.

SUPPORT

If you have any questions, please contact Worldox Technical Support:

§ Call: 1-201-444-3290

§ Email: support@worldox.com