Installing & Configuring Worldox
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Note: This document started out as a checklist for myself to make sure I had taken care of all the items I wanted to. As it expanded, I realized other people might find it useful, especially in considering various tradeoffs involved in certain choices.

Some of this information is relevant for firm administrators; some is more relevant to your consultant.

I   What the Client Needs to Decide/Provide

A. How Many Cabinets Will the Firm Need?

Generally speaking, small or medium-sized firms do not need more than three or four Cabinets (formerly called Profile Groups), namely:

- A general Cabinet for all your documents. Only rarely do I encounter a valid argument for more than one Cabinet. One exception is that rare firm that has a well-organized forms bank administered by a forms librarian. In this case I have set up a "forms" Cabinet that is read-only to everyone except the librarian, who maintains and edits the forms.
- An "Admin" Cabinet for confidential documents: Human Resources, Accounting, Management Committee, etc. Frequently this group resides on a totally different share that most people do not have access to.
- A "Personal" Cabinet for an individual's personal documents. There are three ways to do this:
  - A Cabinet that points to the user's C: drive. This is the default. It does have disadvantages however, namely that it is not indexed or backed up, so if the individual's hard drive fails, their documents are lost. Also, if they change computers their documents may not come with them (an extra step for IT in the move process).
  - A Cabinet that points to the user's network drive (frequently the H: drive). This is also not indexed, but it IS backed up, and if an individual changes assignments the drive will follow them.
  - Create "individual" client/matters (e.g., 8888/john) for personal documents, then create security so that each individual can access only their documents. This takes more time to set up, but has the advantage that their documents are both indexed and backed up. In addition, from a managerial point of view, Worldox administrators can examine the documents if necessary.
- A "Legacy" Cabinet to store documents created before Worldox was implemented and pending their incorporation into the Worldox structure.

B. What Document Types Does the Firm Need?

Attached is a list of shipping document types. Some you will not need and you will want to add others. Keep in mind that with document types "less is more" and that generally 30-50 is a reasonable number. With the new client/matter/doc types "Favorites" function, users can by default see just the last 20 document types they have used, so it is feasible to expand the doc types somewhat. Obviously different practice areas will want types unique to their area. Your consultant may have canned specialty doc type lists (e.g. for Bankruptcy, Litigation, Real Estate, IP).

C   Client/Matter Lists

Where will the firm get its client matter lists from? Does the firm have a time & billing or practice management program it wishes to integrate Worldox with? How will this be maintained on an ongoing basis? In addition to a client/matter list, you will also need a list of users, including their initials and their network login (not the password, just the login) in an Excel or *.csv format.

D Security

Do specific practice areas need to set up security groups for their own documents (aside from the Admin profile)? Are there any Chinese Wall or other security requirements?

E Deleting Documents

The firm may wish to prevent people from deleting documents. This not only prevents human error, but protects against discontented employees who just want to see how much damage they can do before quitting. The most efficient way to do this is to limit the "delete" function to sending documents to the"Salvage Bin" (like the Recycle Bin on your desktop). The firm can then recover these if necessary or have them purged after some period of time has elapsed.

F Email

What policy/recommendation does the firm wish to make about email? In the abstract the best course is to move emails to Worldox (lightens the load on Outlook & makes it more efficient). However, if you have extensive remote access to email via Smartphones, you may be better off copying emails to Worldox. Note that if the firm is using a Practice Management Program (Amicus, Time Matters, Practice Master, Clio, RocketMatter), it should only store and process emails in ONE program to avoid confusion. Given its greater search capabilities, Worldox is usually the better choice.

G Integration

In addition to the normal Word/Excel etc. integration, what other programs do you use? E.g. Document Comparison (Workshare or other); Roxio for writing files to CD, Print to PDF from Outlook, saving files from the Windows Fax & Picture Viewer, custom upload to e.g. court for Electronic Court Filings, or real estate or other registration web sites . How much manipulation of PDF files do you do (markup, combination, bates numbering, etc.)? What versions of Acrobat are you using? Do you use an electronic signature program such as DocuSign or RightSignature?

On installation, a firm administrator (office manager, senior partner) should be walked through the "Integration" list in Worldox Admin. In particular, many firms use multiple versions of Acrobat.

H Document Footer

Does the firm you wish to print a document footer automatically? If so, what information should it contain? Just the document ID, client/matter information, etc.?

I Save Outside Worldox

By default, "Save Outside Worldox" is enabled. The firm should decide if this should be standard or available only to certain people (Managers have this right by default).

II Pre-Installation

A Indexer

Depending on the size of the firm, the Indexer should be a reasonably robust PC with plenty of memory. It can also be a virtual machine, but you need to ensure adequate provisioning in terms of memory and storage. Note the following:
- "Power Saving" features that turn off the network card should be disabled.
- Anti-virus should be disabled on the C:\Worldox directory.
- Automatic updates should be turned off. Otherwise the Indexer will reboot in the middle of the night and not log back in again. The Indexer will not be running and users will not be able to find their documents.
- Create a lmhosts file in c:\windows\system32\drivers\etc that points to the IP address of the file server where Worldox and the data will be located.
- Make sure the Indexer has a static IP address.

- Set the network speed to the speed of the switch, not "auto-detect." *Note*: in some cases, this may slow down the speed of the network connection massively. If so, change it back to "auto-detect."
- Make sure the Indexer has the same drive mappings as all other computers on the network.
- You will need a full copy of Office on the Indexer. Outlook should be installed and configured, but you do not need to set up an actual account. The version of Outlook *must* be the highest version of Outlook anyone in the firm has used or tested in order for the indexer to function properly.
- If you are running MS Server 2008R2 or later, be sure to turn off SMB2 (it can corrupt data) and re-enable 8.3 support.

B   Remote Access

The consultant will need remote access to the Indexer to be able to maintain and troubleshoot Worldox.

C   Drive Mappings

Ideally, you would want three drive mappings: one for the Worldox program (you may be able to use an existing mapping for this); one for ongoing Worldox documents; and one for Legacy documents. Having separate mappings for Legacy documents and Worldox documents makes troubleshooting much easier in the event of a problem.

Since a large percentage of existing documents will not be accessed again, it makes sense to move all existing documents into a "legacy" folder. These documents will be full-text indexed, but if a user needs to edit them, they must be moved into Worldox. If documents have previously been stored by user, the Legacy profile might have one directory level so that users can full-text search only "their" existing documetns.

III Installation

Install Worldox from the Indexer to the server. I prefer to have programs and data on different drive letters, but this is not absolutely necessary.

Run wdupdate.exe to get the latest update before doing anything else.

Installation to the local desktop is a command line: X:/worldox/wdmirror.exe /I where "X" is the path to the Worldox program on the server.

IV Creating Cabinets

The next thing is to create your Cabinets. The default Cabinet contains 4 or 5 fields:
- Client
- Matter
- Doc Type
- Author
- (optionally: Typist)

Some years ago, everyone did both Author and Typist. However, this has fallen out of fashion as so many attorneys now do their own typing. Some firms may want additional fields, but this requires serious thought and discussion.

On the Profile Screen itself,
- Check: AutoName Only; Enable Salvage; Enable Project Folders
- For Legacy Cabinets, set them to Read Only, Deny Open and Deny Copy

You may wish to expand the Max Edit Length to 12

The "Field Settings" screen looks like this
- All fields should be Required and Table Verified
- Client should be a Subdirectory
- Matter should be a Subdirectory and linked to prior field
- Auto-Completion should be on
- Retention Rules should be on if you are going to use them (for deleting files for example)

Options for Sharing/Editing Tables (Making or Editing Client/Matter/DocTypes):
To prevent chaos, you want to restrict the number of people who can open new client/matters and edit the tables. (I once saw a 50-user firm that did not do this and wound up with a client of "~"!).
If you say the table should not be Shared/Editable, you will need to grant rights to the appropriate people to add new client/matter numbers.

Doc Types as a Sub-Directory.
People disagree whether or not to have DocTypes as a directory. Especially for firms with large numbers of files in a given matter (which is more and more common due to email and scanning these days), I find it is much cleaner and prefer to make DocTypes a directory.

This does have a few drawbacks. In particular, you cannot make effective use of the new "My Workspaces" feature. In addition, "Favorite Matters" will not work optimally. If you do make the Doc Types a sub-directory, do NOT link them to specific matters.

When the Cabinet has been created, import the Client/Matter, DocType and User lists. Initialize the DocType list on import so that the unwanted shipping codes are eliminated

V   Configuring the Indexer

To start the Indexer, run xxx\worldox\wdmirror.exe /wdindex /s=pq where "xxx" is the initial part of the path and "pq" refers to the drive letters to be indexed. The indexer should reflect the Cabinets that have been created. If necessary, create additional rules so that all the directories are properly indexed.

If the Indexer is run on a server (not recommended), run it as xxx\worldox\wdindex.exe /s=pq (as above).

Next, set the Indexer schedule. Normally, you want to update the profile and text indexes Mon-Fri nights and Init and Build Sat or Sun. Coordinate the times with the firm backup.

If you wish the indexer to purge the Salvage Bin files after a given period of inactivity (say, 2 months), you need to set that as well.

VI Configuration

Create one file in the main document store.
Move at least one file to the legacy documents and run indexer to initialize both profiles.

You can now continue with configuration prior to indexing all the legacy documents, which may take several hours.

A. Preferences

At this point you need to go through and set preferences. I usually make minimal changes. I do disable the spell checker on profiles. People use client names, abbreviations, etc. so that the spell checker tends to be counter productive. I've only ever seen one firm with a sufficiently strong management to enforce spell checking on the profile screen.

One option where there is a tradeoff is whether to set AutoName on Move to on. The advantage of doing this is that documents being brought over from Legacy automatically get a Worldox document ID. Otherwise, people would have an extra check box to check off, which is obviously an invitation to error. The downside is that as people work, if they move a document, it will get a new document ID. See below Section G for some other less common preferences.

B   Preferences in Admin

Some preferences have to be set in Admin: Run ....\wdadmin.exe /ini

- Click the WDINDEX tab, select Common Options and set email attachments to be indexed.

- Under the Worldox options, check the Word integration options closely. These will substantially reduce the need to manually edit *.ini files. There may also be a few surprises (such as whether or not to grant the ability to store *.dot or *.dotx files in Worldox). This is now the place to set the font size for the document stamp, for example.

C   WDVar.ini

A little-known feature of Worldox allows you to substitute terms for the default terms. To me, the most important feature here is to substitute "Last Used By" for "Owner." Many firms want to display the name of the last person who used the document on the document list screen (see below). This is NOT the same as the Author or Typist field. It is derived from the Windows operating system, which refers to it as "owner." Almost everyone finds this very confusing (since they logically think the "owner" is the Attorney the document belongs to).

Therefore, open up wdvar.ini and insert the following:
            [DlgItemAlias]
            *Owner=Last Used By
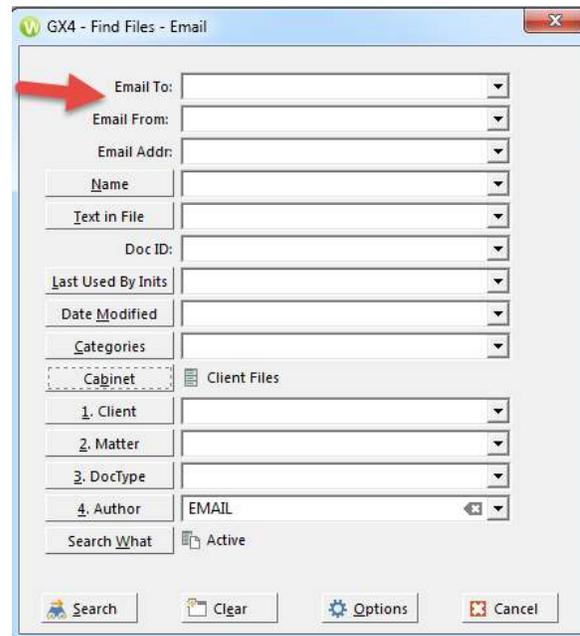You can make other substitutions as desired.
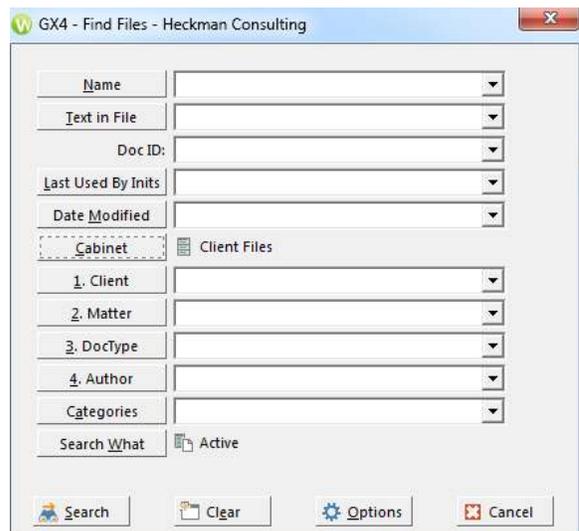
D Profile Search Groups, Worldox Default List and Bookmarks

I generally configure the search display of the base Cabinet as follows:

- I put the Description/Comment and the Text in File fields together at the top. I find it more logical that way.

- I leave only the "date modified" search field. Normally this is sufficient, since the "date modified" will be the last time the file was saved.

- By default Worldox ships with both "Author" and "Typist" fields. Many smaller firms these days do not need both. This is something to be determined with the client.

- It is a good idea to add "Categories" to the search screen as this provides a very powerful addition to functionality. Categories are now searchable.

You should also configure an email search template. "To" and "From" are self-explanatory. "Addr" searches for emails either To or From the person in question. You do not need to enter the full email address: the first or last name or the address all work.

File List Columns

The above Columns are the ones I use for a default Worldox list. Any column can be sorted by clicking on it. I have it sort by date modified in descending order, so that the most recent documents are on the top. Not everyone wants or needs all these columns.

To set the default columns, first select the desired columns and size them (*Note:* the column here labeled "Last Used By" is selected as "Owner" under "Security."). To select a column, click anywhere in a blank area and select the desired item.

Then right click on the column headers and select "Save Template." Save it and give it a name. Then right-click again and select 'Save." This time associate this column template with the search.

When you are done, save the entire display (including directory tree, whether Preview is selected, etc.) and save it for all options.

You may also want to define column settings for an Email search. It might look like this:

✉ To	✉ From	Description	Doc ID	Ver#	▼ Modified	Client Desc	DocType	Categories

E. Audit Trails

> Configure Audit Trails in Admin, Audit Trails, Configure. Then Index the Audit trails so that the index is set.

F. Email Stuff

Email settings and options are scattered a little bit all over. Here are some of the things I am constantly having to check/look up

- Indexing attachments is under Admin/indexing options under wdadmin.exe /ini (see above)
- To password the ability to opt out of the Email screen that pops up when you send an email, look under wdadmin Passwords To change the defaults, in worldox.ini
    [EmailDefaults]
        SentMail=M   (for copy =C, ignore = A)

- To totally disable the email popup insert the following:
    in worldox.ini
        [Debug]
        WatchSentItems=0
- To disable sent items and/or drop folders:
    in Wdwzmain.ini, set
        [DoSentItems]
        Outlook= 0
- Settings for email display options
        [DoDropFolders]
        Outlook=n
    where 'n' means:
    0 = No integration
    11 = opens Outlook integrated Worldox window. Hybrid of start with old way leading to new way on selection.
    12 = Displays Worldox directly in Outlook.

G. Miscellaneous Other Stuff

In Preferences
File List Options | Column Headers Size Automatically - set to NO
This gives you more flexibility in setting default column widths, especially for email displays
If various confirmation screens bother you, many of them can be changed in preferences

In the worldox.ini file
in the [Debug] section:
FastFavs=0   this will let you change the default list display
If you have a problem with opening user IDs in Admin, or with the Sharefile user selection, you can add a line in the debug section:
GetMapiAB=1 (or 0 if there is a problem opening user IDs in Admin)

Various additional rights and preferences, for example, who has rights to add client/matter numbers or access to the Salvage Bin, need to be set through the Admin program.

Shipping Worldox Document Types

Doc Type	Doc Type Description	Doc Type	Doc Type Description
AAP	AAP	NEWS	Newsletters, Labor Alerts, etc
AFF	Affidavit	NOTICE	Notice
AGREE	Agreement	OBJECT	Objections
AIC	Articles of Incorporation	ORDER	Order
ANSWER	Answer	OUTLINE	Outline
ASGN	Assignment of Agreement	PETITION	Petition
ATTYNOTE	Attorney Notes	PLANAMD	Plan Amendment
BENADMIN	Benefits Administration Doc.	PLANDOC	Plan Document
BILL	Billing & Collection Docs.	POA	Power of Attorney
BOS	Bill of Sale	POLICY	Policy
BRIEF	Brief	POSITION	Position Statement
CAP	Caption	PURCH	Purchase Agreement
CERT	Certificate	REQUEST	Request (other than discovery)
CHART	Chart	RESEARCH	Research - Lexis
COMPLAIN	Complaint	ROUND	Roundtable
CONTRACT	Contract	SEMINAR	Speeches, Seminars & Training
DEED	Deed	SMM	Summary of Material Mods.
DELETE	Document To Be Deleted	SPD	Summary Plan Description
DEPO	Deposition	STIP	Stipulation
DISC-DOC	Discovery-Document Production	SUBPOENA	Subpoena
DISC-INT	Discovery-Interrogatories	TIME	Time Sheets
DISCMISC	Discovery-Miscellaneous	TRAINING	Training Documents
EMPAG	Employment Agreement	TRUST	Trust
ENV	Envelope	VERIF	Verification
EQPLEAS	Equipment Lease	VISUAL	Visual Aids, Overheads,& Trans
EXCEPT	Exceptions	VOIRDIRE	Voir Dire
FAX	Fax	WCFORM	Workers' Compensation Form
FORM	Form	WILL	Will
HANDBOOK	Handbook/Manual		
IMAGE	Image		
IMPORT	Imported Document		
INDEX	Index		
JURY	Jury Charges		
LABEL	label		
LEASE	Lease Agreement		
LETTER	Letter		
LIST	List		
MEMOFIRM	Firm Memorandum (Int. Memos)		
MEMOLAW	Legal Memorandum		
MIN	Minutes		
MISC	Miscellaneous		
MORT	Mortgage Document		
MOTION	Motion		