



DOCUMENTS 7

Upgrade Guide

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Introduction

This document describes how to upgrade from DOCUMENTS 6-4 SP1, DOCUMENTS 7.1(with or without R1 or R2 or R3) and DOCUMENTS 7.2 to DOCUMENTS 7.2 SP1. If, for example, you want to upgrade from DOCUMENTS 6.3, you must *first* upgrade from 6-3 to 6.4 SP1 and *then* to 7.2.

INVOICES 5-6 functionality is included in DOCUMENTS 7.2. However, upgrading from INVOICES to DOCUMENTS is not supported or covered here.

COLLECTOR 6-2 is now supported for use with DOCUMENTS. However, upgrading from COLLECTOR as used with INVOICES is not supported or covered here.

COLLECTOR 6-3 cannot be used with DOCUMENTS 7.2, and you cannot upgrade from INVOICES 5-6 SP1 + COLLECTOR 6-3 if Smart XML or other features specific to COLLECTOR 6-3 are used.

REPORTER 7 is now supported for use with DOCUMENTS. However, upgrading from REPORTER as used with INVOICES is not supported or covered here. REPORTER must be installed from scratch and configured specifically for DOCUMENTS (see *REPORTER Installation Guide* included on the DOCUMENTS CD).

FORMS cannot be used *with* any version of DOCUMENTS (though they can run on the same computer), and you cannot upgrade from FORMS to DOCUMENTS.

Preparation

- Make a note of your current database settings : SQL Server, Database name, Username, and Password.
- Make sure you have the user name and password for the SQL Server where DOCUMENTS databases reside.
- Make sure you know your current license server settings.
- Make sure you have the login name and password for the users that run services on any application server(s).
- When upgrading from DOCUMENTS 6-2, update any add-ons that use the XMLFormatter class to match the new location of XMLFormatter in the API. See *API Help*.
- In earlier versions of DOCUMENTS, a Batch ID could be specified in the **Batch** dialog of an Input task and used to track batches, and their documents. In DOCUMENTS 6-4, this was replaced by a Batch tag. Any previously used Batch IDs are lost during the upgrade process.
- Be aware that when your upgrade is complete, you must test any pre-existing add-ons, and recompile any that are not working properly.

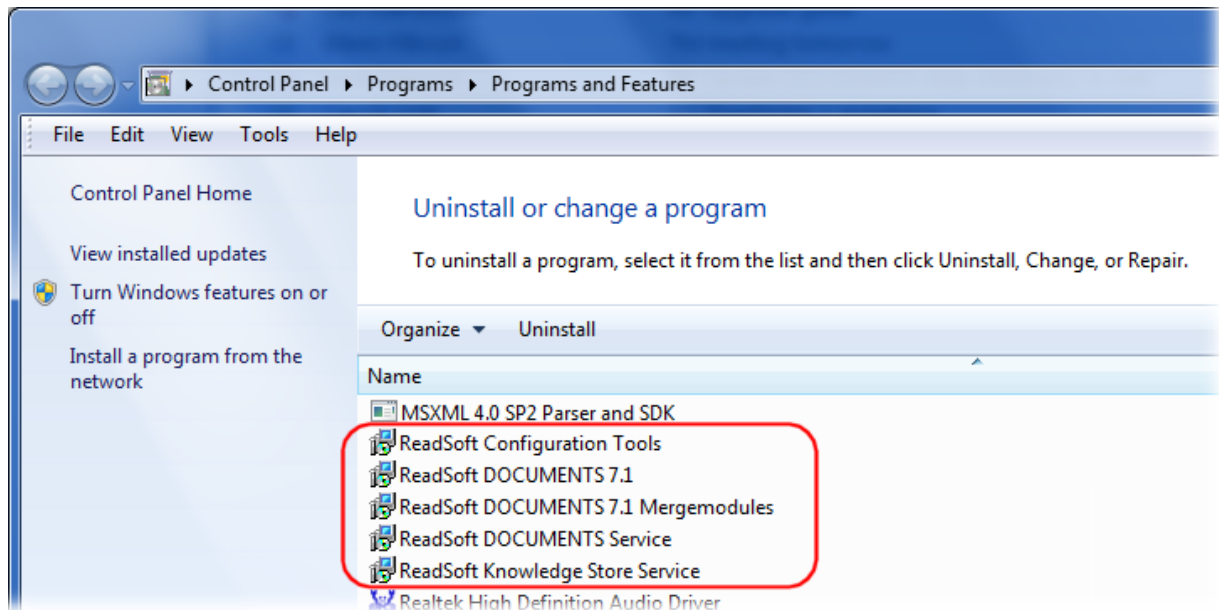
Reduce and back up system data

1. Process all documents through to output until your DOCUMENTS production database is empty.
2. Stop the ReadSoft Production service on any machine(s) where it is currently running.
3. In the Administration module, on the **Supervision** tab, check to make sure that there are no batches remaining in the system.
4. Close all Production modules that are currently running.
5. Create a backup of the entire configuration database using the Administration module.
6. If your DOCUMENTS installation includes one or more solutions that use the Invoice modules (available in DOCUMENTS 7.1 R1 and later):
 - Run a rigorous maintenance plan that clears out as many invoice definitions as can reasonably be deleted. Get rid of the oldest definitions and those that have performance problems. Be sure that unused learning invoices are also deleted.
 - Export all data and objects from the database.
 - **Warning:** Invoice profiles may need to be exported one at a time. Those with many invoice definitions (for example more than 1000) require extreme amounts of RAM memory during export and result in large files. An invoice profile that has 2000 invoice definitions can be about 1 GB in size. If desired, contact ReadSoft Support for assistance.
 - Back up Invoice configuration files, in particular *.evm, *.job and *.ehix.
 - Save all of the initialization files (*.ini) with new names. This includes all Eoglobalextra.ini files. After the new version of DOCUMENTS is installed, you can copy any customized settings from your old initialization files to the ones for your new DOCUMENTS version.
7. Back up the service configuration file (RSProdSvc.exe.config.behaviour or RSProductionService.exe.config.behaviour, usually located in C:\Program Files\ReadSoft\DOCUMENTS\Bin) on servers where the ReadSoft Production Service will be run.
8. To be on the safe side, back up the DOCUMENTS and DOCUMENTS_PRODUCTION databases (these are the default names) in SQL server, using SQL Server Management Studio. Please refer to MSDN documentation for how to do this.

Uninstall DOCUMENTS

Uninstall existing versions of all of these ReadSoft programs and components, if present:

- ReadSoft Configuration Tools.
- DOCUMENTS (listed as “ReadSoft DOCUMENTS” in the list of programs).
- DOCUMENTS prerequisites (listed as “ReadSoft DOCUMENTS Mergemodules”).
- ReadSoft DOCUMENTS Service.
- ReadSoft Knowledge Store Service.



Install the new version

1. Install DOCUMENTS 7.2. See *DOCUMENTS 7 Installation Guide* for instructions.
2. Create new configuration and production databases. See *DOCUMENTS 7 Installation Guide* for further information.
 - 🔴 **When upgrading from DOCUMENTS 7.2 to DOCUMENTS 7.2 SP1, you don't need to create new databases. During the installation, specify the current database and license settings.**
3. Install DOCUMENTS Service on servers where the Production Service will be run. See *DOCUMENTS 7 Installation Guide* for further information.
4. Reinstall the service configuration file (*.behaviour from step 7 on page 5) on the server(s) where the Production Service will run.
 - 🔴 **Important:** When upgrading from DOCUMENTS 6-3 and earlier, you need to rename this file to `RSProductionService.exe.config.behaviour` because the name of this file changed in later versions.

Make sure that the “localpath” points to the `Bin` directory of the installation directory if you installed DOCUMENTS 7.2 in a different location than your previous version.

- 📘 **Note:** If you are upgrading from DOCUMENTS 6-2, you should know about the new service configuration advantages, which became available as of 6-3 SP1. See the [“Production as a service: Overview” topic in *DOCUMENTS Help*](#).

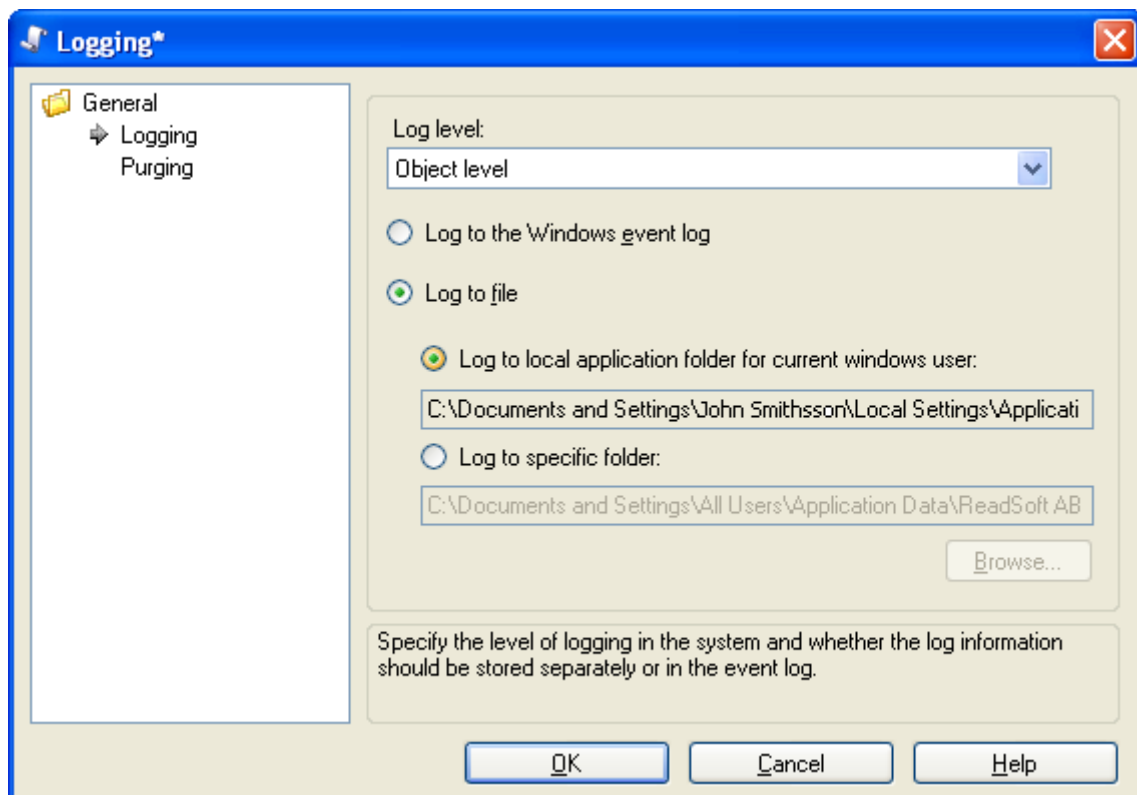
Restore data

1. Using the Administration module, restore the configuration database from the backup that you created in step 5 on page 5.
2. If you are upgrading from DOCUMENTS 6-4 or higher, skip to the next step.

When upgrading from DOCUMENTS 6-3 and earlier, you need to check the **Global policies** for **Logging** settings to see where log files are stored.

Selecting **Log to specific folder** is *not* recommended. If your system requires you to do this, ensure that the path you specify leads to a common server.

Instead, the recommended procedure is to select **Log to local application folder for current Windows user** as shown below. The system then uses a variable to save the log to a path, which is based on the user and the specific Windows operating system he is using.



Logging to local application folder of the current Windows user – recommended.

3. If your previous DOCUMENTS installation included one or more solutions that use the Invoice modules:
 - Using Invoice Manager, import the data and objects that you exported from the database as per step 6 on page 5. (Use **Administration > Import**. See [DOCUMENTS Help](#) if you need further details.)
 - Import master data, if you use it. (Use a maintenance plan. See [DOCUMENTS Help](#) if you need further details.)
 - Restore Invoice configuration files, in particular *.evm, *.job and *.ehix.
 - Copy any customized settings from your old initialization files to the ones for your new DOCUMENTS version.
4. Deploy the solution(s).
5. Test the solution(s).