

UPGRADE INSTRUCTIONS – DOCUXPLORER 2021 RETAIL VERSION

DocuXplorer 2021 is, by far, our most comprehensive version of DocuXplorer. Because of the extensive new features and the fact that the data from the version you are on must be converted to DocuXplorer 2021, this update is not as simple as past updates have been. While the written instructions are provided below and can be performed on your own, you must make sure you have performed a full backup of your data in the current version before executing this process. We cannot be held responsible for not following this step.

That said, without our Super Support package, clients are encouraged to purchase a Level 2 support ticket, so that we can ensure the update is performed without any issues and with as little downtime as possible. Our technicians are specially trained to handle this process and will be able to do it much faster than it would take you internally.

Part 1 - Verify and Backup:

1. Disable any backup or syncing software that may try to access the DXLibrary files.
2. Open DocuXplorer
3. Confirm with your end users that the documents you see in DocuXplorer are the correct production set of documents.
4. Click File <Connect/Create Library>
5. Click “Properties”
6. Copy the “Library Connection Path” to your clipboard.
7. Close DocuXplorer
8. Go to Start < Run> in the operating system (or hold the Windows key + R)
9. Paste the file path and press Enter.
10. The files in this folder represent all of your data in DocuXplorer. Copy this entire folder to a backup disk.
11. Check your backup copy of the Library to make sure it is the same size as your production library and has the same number of files. If there is a discrepancy, try backing it up again. Do not proceed until you have a good backup of your data. Also make a copy of your ..\Program File \DocuXplorer folder.

****An unexpected system error during the conversion process may require that you recover the entire library from your backup. For that reason, also make sure any library data saved outside of the library folder location is also backed up. Without a backup available, you may lose access to all of your data****

Part 2 - Data Preparation

1. Open DocuXplorer as an Administrator if security has been enabled
2. For users running DocuXplorer Personal, skip step 3
3. Right-click on “Library” in the left pane at the top of the hierarchy
 - a. Choose “Connect Cabinet”
 - b. Connect all Cabinets that have been disconnected from the Library, until the window reads that there are no unconnected cabinets. There is never a reason for a cabinet to be disconnected unless directed to do so by DocuXplorer Support.

****You may have disconnected drawers or cabinets saved on a DVD or another hard drive location. Include all of your DocuXplorer data that you would like to have access to at any point in the future****

4. Right-click on "Library" in the left pane at the top of the hierarchy
5. Choose "Perform Maintenance"
6. Click OK (do not select the option to reclaim drive space)
7. For each Cabinet, perform the following:
 - a. Right-click on the Cabinet
 - b. Choose "Connect Drawer"
 - c. Connect all Drawers that have been disconnected. Drawers, like Cabinets, should never be disconnected unless directed to do so by DocuXplorer Support.
 - d. After all Drawers are connected, right-click on the Cabinet and select "Perform Maintenance".
 - e. Click the box to "Include all Drawers"
 - f. Click OK (do not select the option to reclaim drive space)
 - g. Allow the maintenance to complete (you'll see the Cabinet highlighted in blue again, it may take a few minutes for each cabinet)
 - h. Repeat this process for all cabinets.

Part 3 - Update & Convert

1. Type the link below into your web browser's address bar:
<https://download.docuexplorer.com/docuexplorer2021retail.exe>
2. Save the file to your computers C:\DXDocs or your downloads folder.
3. Before running the newly downloaded version:
 - a. Make sure you have installed the latest updates and service packs for your operating system.
 - b. Make sure users have closed DocuXplorer and all Microsoft applications.
 - c. Follow the on-screen instructions to complete the installation.
4. Registration Information: DocuXplorer retains your activation code, so there is no need to re-register your product.
5. Firewalls - If you have an Internet connection, allow DocuXplorer on the workstation to communicate through any firewalls so that we can inform you of any available updates, and give you the choice to automatically download and install. On the server, enable the ads.exe service to communicate internally via the default port of 6262.
6. Antivirus Software - Exclude all DocuXplorer database files from your antivirus software auto-protect process. Exclusions specify the files that should not be scanned by file name extension or by specific file name. File extensions to exclude are .ADT, .ADM, .ADD, .AI, .AM, .ADI and .TMP.
7. Indexing Software - Exempt the DocuXplorer database files from being regularly indexed by software like Google Desktop, Yahoo Desktop, or MSN Desktop.
8. Once the installation has completed, restart DocuXplorer
9. Once DocuXplorer is started, it will identify that a conversion process is required and prompt you to confirm that you have completed your "Data Preparation" steps above.
10. Once you confirm, it's OK to proceed with the conversion and it will start and display the work in progress. The process will take about 30-60 minutes per 100 gigabytes, so do not run any other applications during the conversion. Even if the dialog title reads "not responding," do nothing!
11. Once the process completes successfully, it will ask if you wish to restart DX (DocuXplorer). If the process fails, it will prompt you to email the result to DX Support for review.
12. If you wish to restore your system, simply restore the ..\Program Files\DocuXplorer and ..\DXDocs\DXLibrary folders. Be sure to delete the existing folders first.