## UPGRADE INSTRUCTIONS – DOCUXPLORER 2022 ENTERPRISE VERSION

DocuXplorer 2022 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 2022, 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 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 (for up to one hour of time. Additional time required will be billed following completion of the case), 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. Log onto your server as the Administrator
2. Disable any backup or syncing software that may try to access the DXLibrary files
3. From the server, run ..\DXDocs\DXInstall\Docuxplorer.exe
4. Confirm with your end users that the documents you see in Docuxplorer are the correct production set of information
5. Click Tools, < Active Users>
6. Confirm you are the only user in the system and do not allow any other users to open DocuXplorer until after the conversion
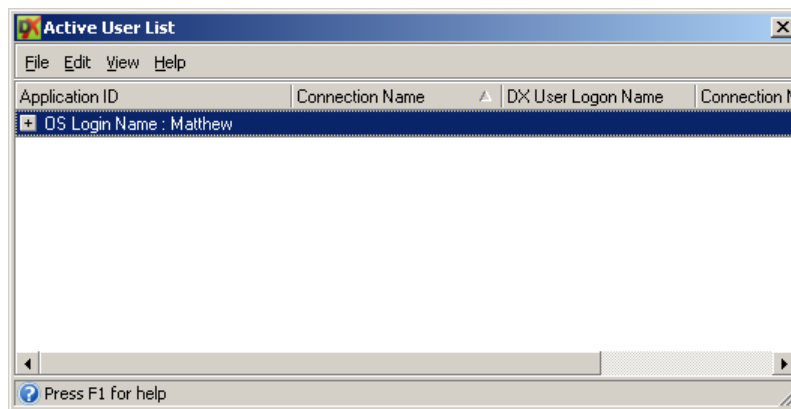
7. Click File < Connect/Create Library>
8. Click "Properties"
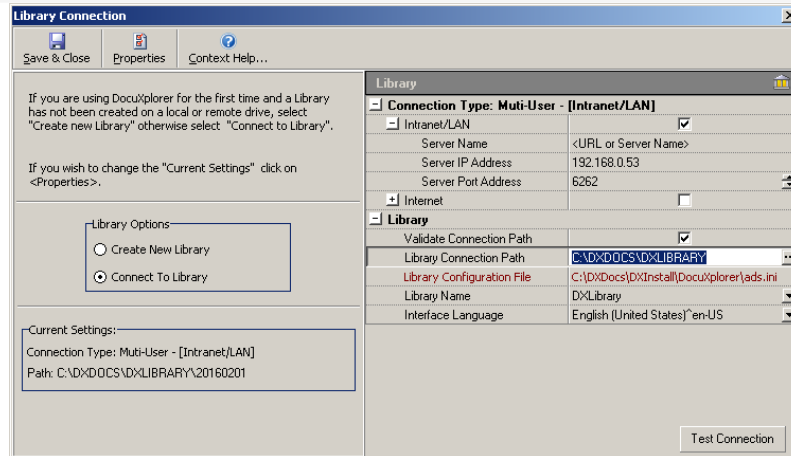
9. Copy the "Library Connection Path" to your clipboard.
10. Close DocuXplorer
11. Go to Start < Run> in the operating system (or hold the Windows key + R)
12. Paste the file path and press enter
13. The files in this folder represent all of your data in DocuXplorer. Copy this entire folder to a backup disk.
14. 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 ..\DXDocs\DXInstall folder

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

Part 2 - Data Preparation

1. Log onto your server as the Administrator
2. Open DocuXplorer
3. Right click on "Library" in the left pane at the top of the hierarchy
4. Choose "Connect Cabinet"
5. 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 <u>saved on a DVD or another hard drive</u> location. Include all of your DocuXplorer data that you would like to have access to, at <u>any point in the future</u>**

6. Right click on "Library" in the left pane
7. Choose "Perform Maintenance"
8. Click OK (do not select the option to reclaim drive space)
9. 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 browser's address bar:
   https://download.docuxplorer.com/docuxplorer2022enterprise.exe
2. Save the file to your server's original installation directory (e.g. (\\Server Name\DXDocs)
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
4. From the server, start the install program and change the default installation directory to your current installation directory (e.g.(?:\DXDocs))
5. Follow the on-screen instructions to complete the installation. (NOTE: Please make sure to select the Advantage database version you are licensed for)
   • Go to Start/All Programs in Windows
   • Click on "Advantage Database Server"
   • Select "Advantage Configuration Utility"
   • Click the "Install Information" tab. This will tell you what version of Sybase Advantage you own
6. DocuXplorer Configuration Utility - After installing the Advantage Database Server, you will be presented with the DocuXplorer Configuration Utility. This utility allows DocuXplorer to conserve computer resources on your server. To configure DocuXplorer resources properly:
   • Enter the number of users to the "Number of Licensed Users" Field
   • Enter the number of Cabinets a user would normally have opened in the Library
   • Click the 'Apply' button
   • Wait for the progress window to disappear before proceeding
7. Registration Information: DocuXplorer retains your Activation Code, so there is no need to re-register your product
8. 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
9. 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
10. Indexing Software - Exempt the DocuXplorer database files from being regularly indexed by software like Google Desktop, Yahoo Desktop, or MSN Desktop

11. Once the installation has completed, start DocuXplorer from the server via ..\DXDocs\DXInstall\Docuxplorer\Docuxplorer.exe
12. 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
13. Once you confirmed it's OK to proceed, the conversion 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 process during the conversion. Even if the dialog title reads "not responding," do nothing!
14. 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
15. If you wish to restore your system simply restore the ..\DXDocs\DXInstall and ..\DXDocs\DXLibrary folders. Be sure to delete the existing folders first

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Version End-of-Life Notice:

All versions of Sybase Advantage Version 11 or prior are no longer supported by Sybase. We recommend that all clients email sales@docuxplorer.com or phone +1 (212) 496-9871 to upgrade their Sybase product to the latest version in order to maintain compatibility with DocuXplorer's Small Business and Enterprise editions. This is a direct purchase from Sybase and has nothing to do with your DocuXplorer licenses.