

DocAve™ Upgrade Guide

From Version 4.1 to 4.5



About This Guide

This guide is intended for those who wish to update their current version of DocAve 4.1 to the latest DocAve 4.5. It is divided into two sections: the server upgrade and the client upgrade. It should be noted that the server upgrade should be performed first in order to ensure the easiest setup for the client package.

*Note: All media servers and web servers must be upgraded to version 4.1.6.0 or above to run the updating tool!

*Note for Previous 4.1 to 4.5 Upgrade Tool Users

An error was found in the previous patch causing the media server upgrade to fail. If you have downloaded and installed a version of this patch before January 29th, 2008, please download the fix from the following link:

http://download.avepoint.com/docave/DocAve_4.1To4.5_UpgradeTool_Patch.zip

Follow the instructions below to apply the upgrade fix:

Step	Action
1	Stop all remote Media Server services.
2	Manually backup the following files under "C:\Program Files\AvePoint\DocAve4\VaultServer\DocAvePatch\lib" from the remote Media Server: <ul style="list-style-type: none">• DocAve-patch.jar• Docave-util.jar• Docave-xml.jar
3	Replace the files in the previous step with those included in the zip file provided above.
4	Start all remote Media Server services.

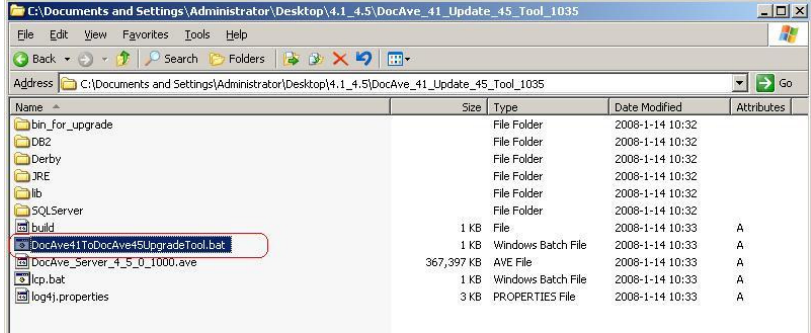
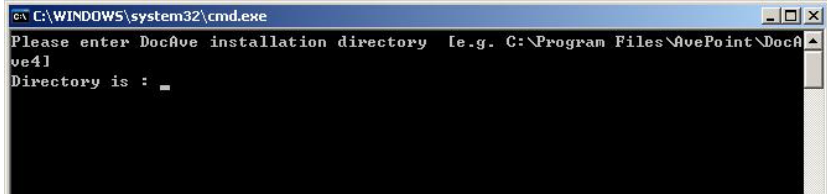
You can now continue to the "Server Upgrade" section below to complete the 4.1 to 4.5 upgrade process.

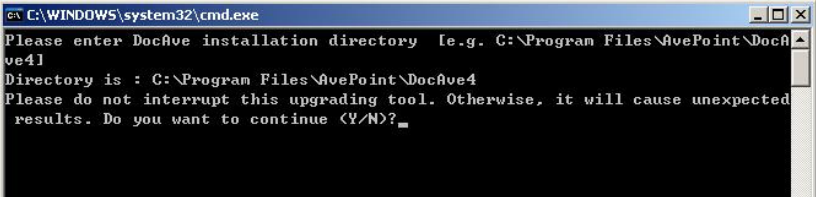
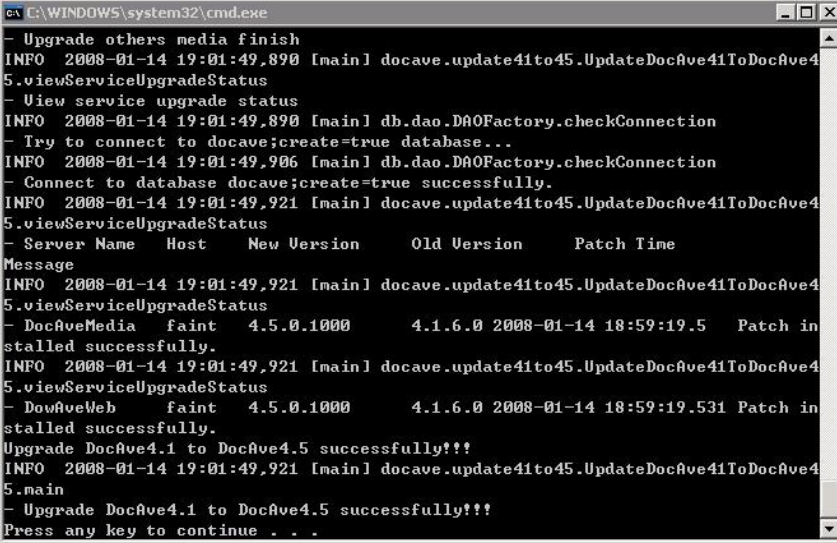
Server Upgrade

During this process, the data stored in the "Vault Server" folder will be backed up to a new folder named "Vault Server 41." This is to ensure a backup is made should any problems arise during the upgrade. After the backup is created, the original folder will be overwritten with the data from DocAve 4.5.

*Note: Before running the application provided, please make sure that the "VaultServer" and "VaultClient" folders under the DocAve4 installation directory are not set to "Read Only." This will cause the upgrade tool to fail.

This upgrade should be performed on the machine where the DocAve 4.1 Server is installed.

Step	Action
1	<p>Using the link provided by your AvePoint representative, download "DocAve_4.1To4.5_UpgradeTool.zip" to the desktop (or to a convenient location) on the server's machine. Extract all contents.</p> <p>*Note: The zip file <u>must</u> be extracted in order to avoid corruption of the upgrade</p>
2	<p>Verify the installation path of the DocAve directory before proceeding. You will be required to enter the path in Step 4. The default path is "C:\Program Files\AvePoint\DocAve4."</p>
3	<p>Navigate to "DocAve41ToDocAve45UpgradeTool.bat" and run the batch file. A command prompt should open.</p> 
4	<p>Input the path of the current DocAve 4.1 directory.</p>  <p>*Note: The example directory provided is the default installation path.</p>

<p>5</p>	<p>When prompted if you wish to continue the installation, type "Y" and press enter.</p> 
<p>6</p>	<p>The data appearing on the screen indicates that the program is running. After a successful upgrade, press any key to exit the upgrade program.</p> 

You have now successfully upgraded the DocAve Manger and Media Server! Please proceed to the DocAve Client upgrade portion of this manual to complete the upgrade process.

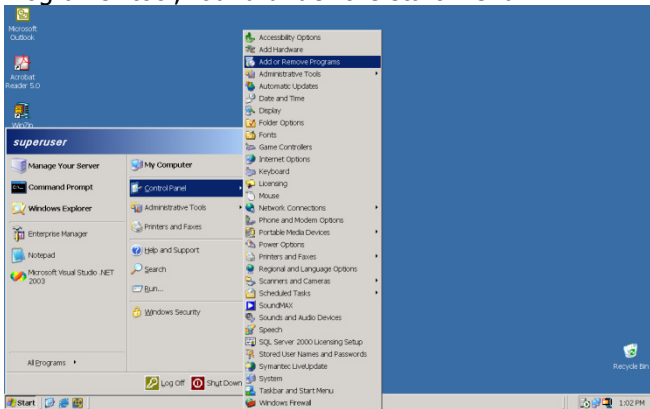
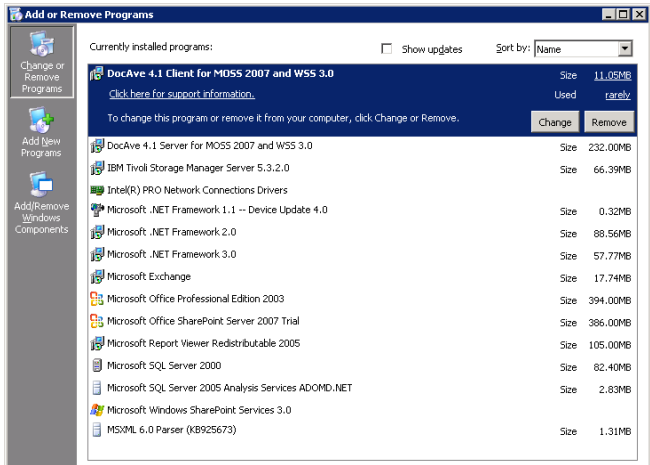
Client Upgrade

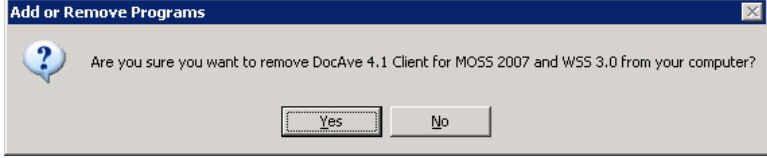
The upgrade of the Client DocAve program can be done in two ways. The first requires an uninstall of the original 4.1 Client Package followed by a complete install of the new 4.5 package. The second method can be done using the DocAve 4.5 GUI, but the Server package must be upgraded first in order to use this option.

Note: If you are currently using Auditor, Archiver, or TrashBin, an IIS restart will be required if the uninstall/reinstall method is used. Using the DocAve 4.5 GUI will not require this restart, and is therefore recommended over Option 1.

Option 1: Uninstall/Reinstall

DocAve 4.1 Client Un-installation

Step	Action
1	<p>DocAve 4.1 Client can be removed using the Microsoft "Add or Remove Programs" tool, found under the start menu:</p> 
2	<p>To uninstall the DocAve 4.1 Client, locate "DocAve 4.1 Client for SharePoint 2003 and WSS V2", and click "Remove."</p> 

3	<p>To continue with the un-installation of the DocAve 4.1 Client, click "Yes" to verify removal, and the DocAve 4.1 Client will be removed.</p> 
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DocAve 4.5 Client Installation

Installation Prerequisites:

- The machine must be a SharePoint Front-End Web Server
- The account used must have administrative rights to your SharePoint and SQL system machines

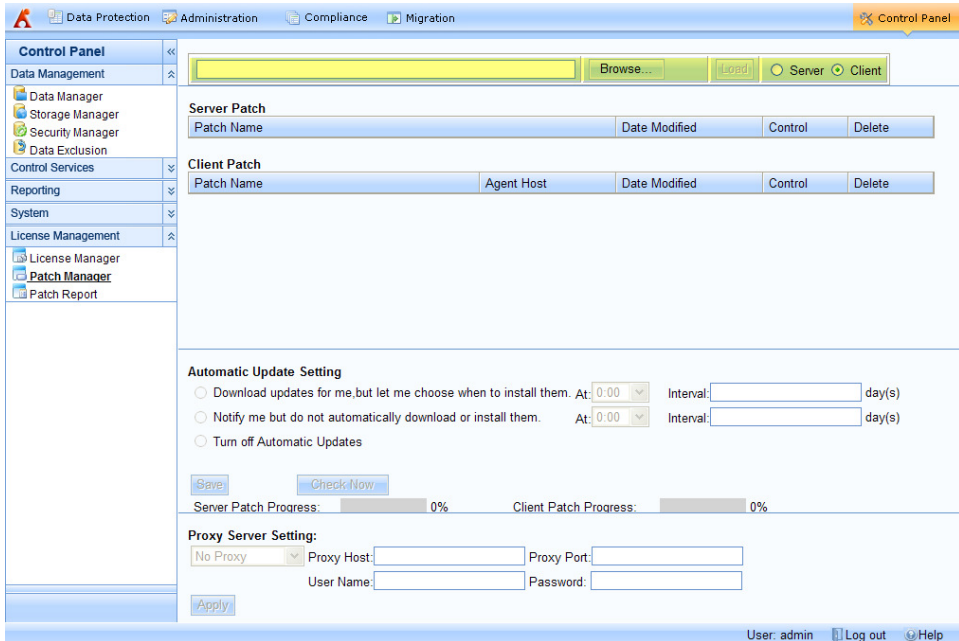
Step	Action	
1	On the machine where you wish to install the DocAve 4.5 Client, open the DocAve 4.5 Client folder. Double click on the file entitled "setup.exe" and the DocAve 4.5 Install Wizard will launch.	
2	Click "Next" to continue.	
3	Review the license agreements for AvePoint and click on the button to select "I accept the terms in the license agreement." Click "Next."	
4	Enter the desired Username and Organization at the Customer Information screen. Verify all information and click "Next."	
5	Select the setup type from "Complete" or "Custom."	
	If...	Then...
	Complete	Select the radio button next to "Complete," then click "Next." *Note: With this selection, all program features will be installed, and DocAve will be installed in the default installation directory "C:\Program Files".

	Custom	<p>Select the radio button next to "Custom," then click "Next." From here, you may change the installation directory from default (C:\Program Files\AvePoint\) to another location.</p> <p>The "Space" button will show the drives available for installation with the associated available space.</p>
6	Click "Next," the DocAve Client installation process will automatically detect the end user's SharePoint environment version and select either "For SharePoint 2003" or "For MOSS 2007."	
7	Click the "Install" button to begin installing DocAve 4.5 Client.	
8	<p>Once the installation is complete, the DocAve Agent Configuration window will appear.</p> <p>It is recommended to use the default settings unless a known conflict with an existing port exists.</p>	
	If...	Then...
	SharePoint 2003	<ul style="list-style-type: none"> • DocAve Server Name: The computer's host name or IP address for the machine on which DocAve Server is installed • DocAve Network Service Port: The default port number is 11000 • DocAve Agent Host Name: Current machine's host name or IP address • DocAve Agent Host Full Name: Current machine's fully qualified domain name. • DocAve Agent Port: The default port number is 10103 • DocAve Web Server / WAS CE Port: default is 8080 • DocAve Browser Port: The default port number is 10105 • Archiver/Auditor Port: The default port number is 10107 • Archiver Search Port: The default port number is 10108 • User Account / Password: An account which has administrative access to both the SharePoint Front-End Web Server and your SQL Server MUST be used. A SharePoint service account is recommended. • AgentType: Check the box in front of the agent function.

		Click "Confirm" to continue.
	MOSS 2007	<ul style="list-style-type: none"> • DocAve Server Name: The computer's host name or IP address for the machine which DocAve Server is installed • DocAve Network Service Port: The default port number is 11000 • DocAve Agent Host Name: Current machine's host name or IP address • DocAve Agent Host Full Name: Current machine's fully qualified Domain name • DocAve Agent Port: The default port number is 10103 • DocAve Web Server / WAS CE Port: The default port number is 11003 • DocAve Browser Port: The default port number is 10105 • User Account / Password An account which has administrative access to both the SharePoint Front-End Web Server and your SQL Server MUST be used. A SharePoint service account is recommended. • AgentType: Check the box in front of the agent function. <p>Click "Confirm" to continue.</p>
9	You can select the "Encrypted" checkbox to have DocAve encrypt all data transmission between the client and the server. It will run automatically and does not require a password.	
10	The installer will configure the DocAve 4.5 Client with the selected name and port designations. Installation is now complete. Select "Finish" to exit the DocAve 4.5 Client Install Wizard.	

Option 2: Using DocAve 4.5 Patch Manager

This process requires DocAve 4.5's Server to already be updated. Please follow the steps listed in the section for the Server upgrade if you have not already done so. This setup takes place from the GUI of the DocAve 4.5 Server's machine.

Step	Action
1	Download the DocAve 4.5 Client patch as a zip file to the machine on which the DocAve server is located. *Note: Do not decompress this file.
2	Change the extension from ".zip" to ".ave" by renaming the file.
3	Open the DocAve 4.5 GUI and navigate to "Control Panel."
4	Under the control panel, select "License Management," followed by "Patch Manager."
5	<p>Along the top panel, select "Client" and then "Browse." Locate the ".ave" file you created in Step 2 and press "Load."</p> 
6	Select the Client you wish to update and press "Apply" next to the loaded patch.

Congratulations, you have now upgraded to DocAve 4.5! Please visit www.avepoint.com to learn about the new modules and enhancements included in this version, or contact your AvePoint account representative for any further questions or information.