

ACS Technical Bulletin



Moving AutoEDMS to a New Fileserver *For use only with AutoEDMS v6.5*

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The following is a list of general guidelines for moving a "production" AutoEDMS v6.5 system from one network fileserver to another. Because each network operating system and network environment (i.e., your company) have their own special characteristics and configuration requirements, it is the responsibility of you and/or your company's Information Systems staff to make sure the NEW network fileserver and other related components are capable of hosting the AutoEDMS system.

Note: This document is written for those with AutoEDMS configuration and/or administration experience. If you need further details on how to perform the procedures referenced in this document, please consult the AutoEDMS online manuals found in the *AE InfoCenter*.

1. **Updating AutoEDMS** - Before starting the process of moving AutoEDMS to the new fileserver, be sure to make sure the latest product updates have been downloaded and applied. This will assure that you have the most current utilities available to simplify the move process. For more information on updating AutoEDMS, consult the "Getting Program Updates" chapter in the online *AutoEDMS Setup & Administration Manual*.
2. **Database Engine** - If your AutoEDMS system utilizes a "client/server" configuration of the Pervasive.SQL (Btrieve) database engine, you will need to make sure the fileserver components are installed and running properly on your NEW fileserver before you proceed with any AutoEDMS configuration steps. It may also be necessary to reinstall the Pervasive.SQL client component on each workstation (see Note).
Note: Before reinstalling the Pervasive.SQL client, run AutoEDMS Station Setup on the first workstation as instructed in **Step 7** below and test AutoEDMS, **Step 8**. If AutoEDMS runs properly, you won't need to re-install P.SQL client software on the other workstations.
3. **Drive Mapping** - If you plan to utilize a particular "mapped" drive letter for the location of the AutoEDMS system on the NEW fileserver, make arrangements with your network administrator so that when you login to the network, that drive letter is available. Also, if the OLD fileserver is still active, it would be best not to be connected to it while doing setup & configuration of AutoEDMS on the NEW fileserver.

4. **AutoEDMS Installation on the New Server** - It isn't necessary to do a "fresh" installation of AutoEDMS on your new fileserver. You can simply copy the entire AutoEDMS _SysRoot: folder (e.g., AEW65) over to the new fileserver. Most customers locate their own system files, i.e., their "AutoEDMS Development Environment" folder, within the AutoEDMS folder structure, so copying the AutoEDMS folder should bring everything over to the new fileserver... but be sure you know where your Form & database files are located before you start the transition so you can plan accordingly. See **Step 6** below.

Note: If your firm is utilizing a Wide Area Network configuration of AutoEDMS, with Forms & ACL programs installed on the "remote site" workstations, but the database files located at the "central site" where you're moving AutoEDMS to a new server, you should use QwikForm at each "remote site" to check the DDF file(s) and make sure they contain the correct paths to related Form and database files. See **Step 6b** below.

5. **Workflow Routes Record Database** - You can eliminate some possible configuration work if you make sure ALL checked-out AutoEDMS records are checked-in before moving AutoEDMS over to the NEW fileserver (see Note below).

If you don't meet both requirements in the Note below, and you can't check-in all records before moving AutoEDMS, use the "Workflow Route Manager" to update path information stored in workflow records as described in **Step 6g** below.

Note: You will not need to check-in all Workflow records if you meet both of the following requirements:

- a) Your managed data files (i.e., the files being managed by AutoEDMS) are not being moved to a new location.
 - b) Your Workflow and regular AutoEDMS database files are located under the AutoEDMS _SysRoot: (installation) folder. This is the "normal" AutoEDMS configuration, except in WAN configurations where the shared database files are located outside of the _SysRoot: folder.
6. **Path Settings (and related issues)** - Any path currently saved in AutoEDMS using a Dynamic Drive Mapping (DDM) or Universal Naming Convention (UNC) type of path would need to reflect the new fileserver and volume names. Changes (if needed) must be made with AutoEDMS utilities as described below.

Potential areas where paths may need to be checked or changed are as follows:

- a. **Form Registration** - you will need to update the registration for each of your Forms in the copy of AutoEDMS on the new fileserver. From the AE InfoCenter, run the **Form Registration** utility under the Setup branch – you should be able to update the existing records by simply browsing to the location of the Form's DDF file(s) to update the path.
- b. **Form Display Definition file(s)**, i.e., the DDF file for each of your AutoEDMS Forms - You must check the DDF file(s) and make sure they contain the correct paths to the related Record Database (RDB), Record Definition (RDF), Project Database (PDB), New Record ACL, and Form Background Image files (refer to **Step 6c** below). You would do this in QwikForm by selecting **File | Form Properties**, and choosing the "Btrieve" tab

Note: If your firm is utilizing a Wide Area Network configuration of AutoEDMS, with Forms & programs installed on the "remote site" workstations, but the database

files located at the "central site", it will be necessary to check the DDF file(s) located at each "remote site" to make sure they contain the correct paths to related Form & database files.

- c. **Form Background Image .TXT file** "<formname>.TXT" - This file, which stores the paths to the Form's background images, might need updating (see Note below). Updating the paths can be done with a simple text editor such as Notepad. The file is located in the same folder as the Form's DDF file.

Note: If the Form was developed in an AutoEDMS "Development Environment" under _SysRoot:, and all the paths in the <formname>.TXT file refer to "_SysRoot:", no changes would be needed in the TXT file.

- d. **ACL Program Registry** - The paths to AutoEDMS ACL programs that are run from Form, Execute menu may need to be updated. You would do this from the AE InfoCenter in the **ACL Program Registration** utility under the Setup branch. You should be able to update the existing records by simply browsing to the location of the file(s) to update the path.

- e. **Storage Path Field** - If the physical location of your managed document or drawing files has changed with the move of AutoEDMS to a new fileserver, the "storage path" field of each record in the Record Database must be updated (for each Form) – see Note below. This path information can be revised manually, one record at a time. Or, it can be revised (much more quickly) in multiple records with a single step by using the "Database Management Tool" (an ACL program). The Database Management Tool ACL program file is named "dbmngt.acl", and can be found in the ACL-FORM folder of the AutoEDMS system folder... you can run it from the **Form | Execute** menu option, or add a button to the AutoEDMS ToolBar that runs this ACL file – for an example, see “Demonstration Form #1”, which has a button configured to run the Database Management Tool.

Note: If the managed files are not being moved, simply make sure the Storage Path information in the records is correct. Or, if the managed files were located in folders under the AutoEDMS system folder (i.e., _SysRoot:), and "_SysRoot:" is part of the Storage Path, you will not need to modify the Storage Path information.

- f. **Project Path** - The path for each AutoEDMS “Project”, if you are using Projects, may need to be modified - also see Note below. The Project path information can be revised manually, one record at a time, from within AutoEDMS by selecting **Project | Update**. If you have more than just a few Projects, the path can be revised in multiple Project records with a single step by using the “Project Update” ACL program (the filename is PrjUpdate.acl in the _SysRoot:ACL-FORM folder), which you can run from the **Form | Execute** menu option by selecting “Use any ACL Program”.

Note: If the project data directories were located under the AutoEDMS system folder (i.e., _SysRoot:), and "_SysRoot:" is part of the Project path, you will not need to modify the Project paths.

- g. **Workflow Routes Record Database** - After you move (copy) AutoEDMS to the new fileserver, run the **Workflow Route Manager** and review a few of the route database records. On the “Record” tab, check the paths to the RDB and Form files. On the

“Origin” tab, check the Path to the original file. If you find that any of the paths need to be modified, use the “String Substitution” feature on the Tools pulldown menu.

If the paths stored in the route database records are not correct, users will not be able route or check-in documents that were “in-route” at the time you moved AutoEDMS to the new fileserver.

- h. **Workflow Route Template(s)** - If Workflow route templates were customized to refer to folders or files located outside of the AutoEDMS system folder (_SysRoot:), then the Workflow route templates may need to be updated – see the Note below.

Use the **Visual Workflow Designer** utility to examine the “File Handling” tab of the Start step of all route template file, and make sure any paths entered will be correct. If your route templates run custom ACL programs, you should check the paths to those files as well – see Note below.

Note: Workflow route templates that were created with the optional "Advanced Workflow Designer", like routes that run ACL programs at particular steps, cannot be updated with the standard "Visual Workflow Designer". If you suspect the Advanced designer was used to create your route templates, contact your Authorized AutoEDMS Dealer or ACS Software, Inc., for assistance.

- i. **Extension Association Registry** - if you are using the “Extension Association Registry” as the default “application source”, you should check to make sure paths stored in the Extension Association Registry are correct if they refer to folders and files located outside of the AutoEDMS system folder. This can be done from the AE InfoCenter in the **Extension Association Registry** utility under the “AutoEDMS Registration Databases” branch, which is under the “Setup” branch.

If you’re not sure whether the Extension Association Registry is being used in your AutoEDMS system, refer to the topic “Defining the Application Source” in Chapter 3 (Linking & Launching Applications) of the online *Customization & Development Manual, Part 2*.

Note: In most cases, access to Extension Association is restricted to AutoEDMS users that have "manager" rights.

- j. **AutoTitleBlock System** - if you are using the “AutoTitleBlock System”, you should check to make sure paths stored in the AutoTitleBlock Registry are correct if they refer to folders and files located outside of the AutoEDMS system folder. This can be done from the AE InfoCenter in the **AutoTitleBlock Registry** utility under the “AutoEDMS Registration Databases” branch, which is under the “Setup” branch.

Note: In most cases, access to the AutoTitleBlock System configuration is restricted to AutoEDMS users that have "manager" rights.

- 7. **Station Setup** - After moving (copying) the entire AutoEDMS system over to the new fileserver, updating the configuration as described above in **Step 6**, and drive mappings (if used) are set up as they will be during normal operations on the new fileserver... run **AutoEDMS Station Setup** (from the AE directory on the new fileserver) at the first workstation.

If that workstation had previously been running AutoEDMS, Station Setup will read the "Station ID" from the AUTOEDMS.INI file on the workstation. If it had not previously been running AutoEDMS, you will need to determine the proper "Station ID" for that workstation.

8. **Testing** - Test AutoEDMS thoroughly from the first workstation, performing the procedures used by system users during daily operations.
9. **Station Setup on Other Workstations** - With all necessary changes made according to the details in **Step 7**, and testing completed as per **Step 8**, run Station Setup on the rest of the AutoEDMS workstations.

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