

# ACS Technical Bulletin



## **Moving AutoEDMS to a New Fileserver**

*For use with AutoEDMS v5.0 and v6.0*

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The following is a list of general guidelines for moving a "production" AutoEDMS 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.

Where AutoEDMS terminology or menu names may have changed between Versions 5 and 6, a reference is provided as to what AutoEDMS program, function, or menu option is used to make that particular modification.

**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.

1. **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. It may also be necessary to reinstall the P.SQL / Btrieve client component on each workstation.  
**Note:** Before reinstalling the P.SQL / Btrieve client, run AutoEDMS Station Setup on the first workstation as instructed in Step 4 and test AutoEDMS. If AutoEDMS runs properly, it won't be necessary to re-install P.SQL / Btrieve client software.
2. **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 to not be connected to it while doing setup & configuration of AutoEDMS on the NEW fileserver.
3. **Workflow Routes Record Database** - Before moving AutoEDMS over to the NEW fileserver, make sure ALL checked-out records are checked-in. The reason for doing this is because it may not be possible to complete the Workflow route on records that were checked-out at the time AutoEDMS was moved.
4. **Station Setup** - After moving (copying) the entire AutoEDMS system over to the new fileserver, and drive mappings 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 been running AutoEDMS, you will need to determine the proper "Station ID" for that workstation.
5. **Form Registry** - you will need to update the registration for each of your Forms in the copy of AutoEDMS on the new fileserver. You should be able to update the existing records and simply browse to the location of the Form's DDF file(s) to update the path.

v6 = AE InfoCenter, Setup..., Setup, Form Registration

v5 = AE Setup, Forms, Modify

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.

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

- a. **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 6b below).

**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 files.

v6 = AE InfoCenter, Setup..., FormTool

v5 = AE Setup, Advanced Form Tool icon

- b. **Form Background Image .TXT file** "<formname>.TXT" - This file, which stores the paths to the Form's background images, might need updating. 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 that file.

- c. **Attaché Registry** - Attaché Registration must be run after a Form's DDF has been modified, regardless of whether or not changes are made within Attaché Registration.

v6 = AutoEDMS, Form, Execute, Customization Menu, Attaché Registration folder

v5 = AutoEDMS, "AutoEDMS Configuration" flowchart, Form Configuration button

**Note:** In most cases, access to Attaché Registration is restricted to AutoEDMS users that have "manager" rights.

- d. **ACL Program Registry** - The paths to AutoEDMS ACL programs that are run from Form, Execute menu may need to be updated.

v6 = AE InfoCenter, Setup..., ACL Program Registration

v5 = AE Setup, ACL\_Program, Modify

- e. **Storage Path Field** - The "storage path" field of each record in the Record Database must be updated (for each Form). This field can be revised manually, one record at a time. Or, it can be revised 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 "dbmgnt.acl", and can be found in the ACL-FORM folder of the AutoEDMS system folder... the simplest way to utilize it is to add a button to the AutoEDMS ToolBar that runs this ACL file.

- f. **Project Path** - The path in each AutoEDMS Project may need to be modified from within AutoEDMS. Also see Note below.

v6 = AutoEDMS, Project, Update

v5 = AutoEDMS, Project, Modify

**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** - this can be resolved by checking in all checked-out records before moving the AutoEDMS system 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, then the Workflow route templates may need to be updated. See Note below.
    - v6 = AE InfoCenter, Setup..., Development, Visual Workflow Designer
    - v5 = AE Setup, Visual Workflow designer icon

**Note:** Workflow route templates that were created with the ACS "Advanced Workflow Designer", an optional developer tool, cannot be updated with the standard "Visual Workflow Designer".
  - i. **Extension Association Registry** - if used in your AutoEDMS configuration, Extension Association records should be updated if they refer to folders and files located outside of the AutoEDMS system folder.
    - v6 = AutoEDMS, Form, Execute, Customization Menu, Extension Association folder
    - v5 = AutoEDMS, "AutoEDMS Configuration" flowchart, Extension Association button

**Note:** In most cases, access to Extension Association is restricted to AutoEDMS users that have "manager" rights.
  - j. **AutoTitleBlock System** - if used in your AutoEDMS configuration, AutoTitleBlock records should be updated if they refer to folders and files located outside of the AutoEDMS system folder.
    - v6 = AutoEDMS, Form, Execute, Customization Menu, AutoTitleBlock System folder
    - v5 = AutoEDMS, "AutoEDMS Configuration" flowchart, AutoTitleBlock System button

**Note:** In most cases, access to the AutoTitleBlock System configuration is restricted to AutoEDMS users that have "manager" rights.
7. **Testing** - Test AutoEDMS thoroughly from the first workstation, performing the procedures used by system users during daily operations.
8. **Station Setup on Other Workstations** - With all necessary changes made according to the details in Step 6, and testing completed as per Step 7, run Station Setup on the rest of the AutoEDMS workstations.

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