Tips and Tricks for Upgrading to eDOCS DM 10

Webinar

Session Questions and Responses

eDOCS Product Management
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Tips and Tricks for Upgrading to eDOCS DM 10 ILTA Webinar

The “Tips and Tricks” presentation that was held as part of the ILTA eDOCS Webinar series on January 14, 2015 had several questions asked during the presentation. This document is a response to the questions asked as well as the ones that were not covered during the presentation due to time constraints.
1. **Have the Library Maintenance functions been added to the DM 10 Management Studio?**

   The implementation of the Library Maintenance features into the new DM Management Studio is on the product roadmap for version 10.1 which is currently scheduled for the second half of calendar 2015.

   The eDOCS DM Roadmap summary is available here on the OpenText Knowledge Center:

   https://knowledge.opentext.com/knowledge/lisapi.dll/Open/29500895

2. **Is it a recommended best practice to build out new DM Servers instead of upgrading current ones? If not, is there any benefit to doing things that way?**

   Yes, it is always recommended to start with new server installs with the latest DM product updates as well as Operating Systems and their updates. New environments are typically more efficient because the Windows registry and hard drives are not fragmented; the event logs and system caches are empty or cleaner, as examples.

   However this is not mandatory. The DM 10 software can be installed on top of an existing DM 5.3.x Server as long as the version of the operating system is supported by DM 10.

3. **We are on Hummingbird DM 5.1.0.5. What is our migration path?**

   At a high level the eDOCS DM database will need to be upgraded to the DM 5.3.1 schema with the DM 5.3.1 Library Generator utility that is included in the Tools directory of the DM 10 image. Once it is upgraded to 5.3.1 it can then be upgraded to 10 following the steps in this presentation.

   However there are some additional steps that are required in an upgrade from 5.1.0.5 to DM 10, mainly due to the fact that the supported platform versions are different between the product versions.

   The eDOCS DM 5.1.0.5 software supported MS SQL Server 2005 was the most current version at the time and the mainstream support for this product from Microsoft ended in 2011. Your SQL database will need to be moved to a version of MS SQL server that is supported with DM 10 prior to upgrading the database schema.

   You will also need to deploy new installations of the DM 10 Servers and Clients because the versions of the platforms supported in DM 5.1.0.5 are no longer supported with DM 10 and as a result upgrades cannot be performed.

   We recommend that you contact OpenText Support or Global Services to further discuss the upgrade steps for your environment.
4. Which Office suites are compatible with eDOCS DM 10?

The Microsoft Office 2013/365 and 2010 are supported as well as Office 2007 which had limited testing; it is recommended to upgrade to a more current version of Office.

Corel X3 and X5 and Lotus 123 version 9.7 and 9.8 are also supported.

The eDOCS DM 10 release notes include additional details for the supported platforms and integrated applications.

https://knowledge.opentext.com/knowledge/lisapi.dll/Open/54162347

5. Is the DM 10 Server 2008 32 bit?

Yes, the eDOCS DM 10 Server is a 32-bit application that runs on the Windows Server 2008 and 2012 64-bit operating systems.

6. It currently takes us two weeks for an index rebuild; what should we expect if we go through this upgrade?

When upgrading to eDOCS DM 10 you do not need to rebuild your DM Indexes from previous versions. Depending on which version you are upgrading from, the document filters for the DM Indexer and Viewer may be different from what was used to originally index the documents. In some instances this difference may cause an offset in the search term highlighting within the DM viewer and you may want to reindex if this is the case for your environment.

The new eDOCS DM 10 Management Studio introduced several new re-indexing options so you can now use “From last edit date” or “Range of Documents” instead of having to reindex all of the DM documents at once.

7. Is eDOCS Email Filing compatible with eDOCS DM 10?

The Email Filing version 4.3 scheduled to be released in January 2015 will support the following new feature in DM 10:

- Modern Save Interface
- Declare Record function
- Last Profile Edited By column
- Date Time column
- New Profile Security table link
- DM 10 Folder Inheritance (exclusion settings)
8. Where on the website can we find the slides from today?

Today’s presentation was originally delivered at Enterprise World as well as additional DM 10 product overviews, the presentations are available here:

https://knowledge.opentext.com/knowledge/cs.dll/Open/55611644

9. Will an eDOCS DM 5.3.1 Client work against a DM 10 Server with the database schema at the DM 10 version?

Yes.

10. Can a DM 10 Client access a DM 5.3.1 Server?

No. A newer version of the DM Client is not supported with an older version of the DM Server because the DM server will not understand or know what to do when the new features in the client are used.

The DM 10 client checks the version of the DM Server when the user performs a login and if the DM Server is an earlier version then DM 10, the login will not be successful.

11. What happens to the index if a user name is changed (e.g., somebody gets married)?

The DM Server can detect this change and re-indexes the metadata fields where the name has changed. This occurs for all fields, not just a user name.

12. Are the changes to the API from DM 5.3.1 to 10 detailed in a specific document?

Yes. They are included in the DM 10 Release Notes.

https://knowledge.opentext.com/knowledge/lisapi.dll/Open/54162347

13. Are the changes to the API from DM 5.3.1 to 10 detailed in a specific document?

Yes. They are included in the DM 10 Release Notes.

https://knowledge.opentext.com/knowledge/lisapi.dll/Open/54162347
14. Is Kofax Capture compatible with eDOCS 10?

Please contact Kofax technical support to confirm which version of their products and eDOCS are supported together.

http://services.kofax.com/support/details/contact/kofax-support-detailed-contact-info.php

15. When you say all DM Servers must be upgraded to 10, do you mean servers in a fail-over configuration? What about DM Servers outside of a particular fail-over configuration?

Yes, all DM Servers that are configured in a cluster must be upgraded to DM 10 at the same time.

If you have multiple DM Servers in your environment that are not setup in a cluster they can share the same DM Library as long as the database is a DM 5.3.1 schema.

When the DM Library is upgraded to the DM 10 schema, all servers accessing that library need to be upgraded to version 10.

16. If we are staggering library upgrades across multiple sites, would that mean a site that has not been upgraded, cannot search a library that has been upgraded and vice-versa?

Yes. If you are upgrading the DM Library to the version 10 schema, all DM servers whether local or remote must be version 10.

The DM 10 Server install has been changed where it no longer runs the Library Generator / Tablecomp as part of the server upgrade, specifically to avoid having DM 5.3.1 servers trying to connect to a DM 10 library schema.

The process is to upgrade all the DM servers to the DM 10 server software and upon completion, run the “eDOCS 10 Library Upgrade Utility” to upgrade the library schema.

For full-text indexing to work across all libraries, all DM Servers and indexers must be upgraded to eDOCS 10.

17. If you don’t upgrade servers at all sites to DM 10, what happens when DM 10 Clients try and access a library in a yet-to-be-upgraded site?

The eDOCS DM 10 Client will not allow the user to login when connecting to a DM 5.3.1 Server or DM 10 Server supporting a DM 5.3.1 schema.
The DM 10 Client requires the DM 10 Server and Library to be version 10 before it can be deployed and used.

18. When upgrading to DM 10 Servers does the previous version of DM Server need to be manually uninstalled?

No. The DM 10 Server install will recognize when a DM 5.2, 5.3.X Server is already installed and will perform an upgrade of that environment.

19. When upgrading to DM 10 Clients does the previous DM Client need to be uninstalled manually?

No, The DM 10 Client install will recognize when a DM 5.2 (Windows 7 only), 5.3.X (Windows 7 or 8.x) Client is already installed and will perform an upgrade of that environment.

20. How much longer will DM 5.3.1 be supported?

The eDOCS DM 5.3.1 software is in Current Maintenance until the end of June 2015. The DM 5.3.1 software will then transition to the Sustaining Maintenance state in July 2015.

The eDOCS DM support lifecycles and definition of the support states is available here:

https://knowledge.opentext.com/knowledge/cs.dll?func=ll&objId=21149218&objAction=browse&sort=name

21. Has anyone tested IntApp Wall Builder with DM10?

IntApp is in the process of upgrading their applications to support eDOCS DM 10. Contact IntApp at support@intapp.com for the latest status.

22. Is the RM Admin Tool updated to 10.0?

Yes, the eDOCS RM Client and RM Admin Tool have both been updated and are included on the DM 10 ISO image.

https://knowledge.opentext.com/knowledge/lisapi.dll/Open/54017765
23. **Would an upgrade of the eDOCS 5.3.1 Client to eDOCS 10, allow users to see the new profile search form?**

   Yes, they are included in the DM 10 Release Notes.  
   https://knowledge.opentext.com/knowledge/lisapi.dll/Open/54162347

24. **Can older DM Clients use the new updated Index?**

   Yes, the DM 5.2, 5.3.x Clients can connect to a DM 10 Server/Indexer when performing searches.

25. **Do the older DM Clients render the new profile search forms?**

   Yes, the DM 5.2, 5.3.x Clients can use the new DM 10 profile search forms.

26. **Is the DM 10 Client Windows 7 SP1 32 bit compatible?**

   Yes, there are two DM Extensions installers; one for Windows 7, 8.x 32 bit (x86) and one for Windows 7, 8.x 64 bit (x64).

27. **How can we tell if the index is done with its upgrade?**

   You will need to enable logging for the DM Indexer and if the log shows the processing of batches of 2,000 documents it is still performing the upgrade. If the log shows processing of single document or smaller batches, it is performing day-to-day updates and the index upgrade is complete.

28. **Does the DM Management Studio replace the DM Server Manager?**

   The intent is for the new DM 10 Management Studio to replace the DM Server Manager over the long term. With DM 10 we included both for convenience for those who want to continue to use the DM Server Manager.

   There are several new features included in the DM 10 Management Studio that are not available in the DM Server Manager.

   Those features include:
   - Reindex a portion of the DM Library
   - User and Group permissions controlling access to the DM Servers/Indexers in the environment and what management functions the user or group can perform.
• The Management Studio is a Windows desktop client that allows you to access all the servers in the environment without having to use remote desktop access to the individual DM Server.

• The Management Studio will be enhanced in future versions to include features from the other DM Management Utilities like Library Maintenance.

29. Can you run the upgrade utility on multiple libraries at different times?

Yes, the DM 10 Upgrade Utility is run on a single library at a time. If you have multiple libraries in your environment you will need to run the upgrade utility against each one of them individually.

30. Does the behind-the-scene work of the upgrade utility, upgrade the existing assigned profile/search forms as well?

The upgrade utility does not change which profile forms are setup within the environment for document profiling or searching based on group or application.

The upgrade utility does upgrade your existing profile and search forms to use the new metadata fields or item type definitions. After the upgrade you will need to check the forms visually.

31. How does one move from Hummingbird V6 to DM 10?

There is no upgrade utility to move from DM 6 to DM 10. You will need to migrate your data from DM 6 to DM 5.3.1 or 10 and then perform new installations of the DM Server and Client software.

OpenText support and Global Services should be contacted on how to migrate from DM 6 to DM 10.

32. When do we change the Hybrid Search setting in the registry? At what point in the upgrade?

Hybrid must be disabled on all DM Servers until the index has finished updating the new fields. Once the index is up to date then hybrid searching can be enabled. The index is still searchable and the correct results will be returned while hybrid is disabled, but the performance will greatly improve once hybrid is enabled.
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