ProSystem *fx*® Document

Server Upgrade from Version 3.7 to Version 3.8

This Document will guide you through the upgrade of Document Version 3.7 to Version 3.8. Do not attempt to upgrade from any other version of Document. You can find the most current updates [here](#).

Stop the Web site where Document is installed

1. Right-click **My Computer** and choose **Manage**.
2. In the Computer Management section, expand Services and Applications.
3. Expand Internet Information Services.
4. Expand Web Sites.
5. Right-click the Web site where Document is installed and choose **Stop**.

Stop the Document services on the server

1. DocumentWatcher
2. RoutingQueue
3. TaxDocuWatch

I. **Backup Files**

1. Log in to the SQL Server Machine.
   - Open SQL Enterprise Manager or SQL Management Studio.
   - Back up Common_DB.
2. If you have a Client Portal and a SSL (Secure Sockets Layer) certificate applied, do the following:
   - Log onto the Client Portal server and browse to **C:\Program Files\ProSystem fx Document\ClientPortal** (C:\Program Files\ProSystem fx Document is the default install location, the application may be installed in another location) and make a copy of the file *Web.config*.
3. Verify that you have a backup of the Extended and Managed Storage areas.

II. **Install Document**

1. Log into the Document server as the Document domain admin service user account (the one you will be using in step 5 below).
2. Run Setup.exe from the downloaded install package.
3. On the launch pad, click the Document Server button.
   a. If required software has not been installed, a screen displaying the required software that must be installed is displayed
   b. Click **OK**. After software installation has completed, the InstallShield Wizard will resume
   c. The 3.8 installer launches. Click **Next.**
   d. Accept the License Agreement and click **Next**.
4. The *Install Document to* folder will display with the default location populated in the *Destination Folder* dialog.
   a. Accept the default or click **Change** to browse to and select a different path.
   b. If Document 3.7 is not installed to the Default Web site, select the Web site where Document is installed and click **Next**.
5. Click **Next** on the *Login Information* page after entering your Document domain administrator account (must be in the format domain\username)
6. Select the Permission key disk drive path radio button and click Browse.
   a. Browse to the Document 3.7 installation folder and open the Permission Key file, *fxperm02*, and click **Next**.
7. In the *Server Selection* dialog, the Portal Web Server install option will be available if the Permission Key contains licensing for the Client Portal. The Portal MUST be installed on a separate server. Uncheck the Portal Web Server box and Click **Next**.
8. In the *Web and Application Servers* dialog, do the following:
   a. Enter the appropriate Portal Server name if licensed.
   b. Click **Next**.
9. In the *Database Server* dialog click **Next** after entering your Database Server information.
10. In the *New Indexing Service Catalog* dialog, accept the default value or change the drive letter to a valid drive letter that exists on the Application server for the Catalog Path field and click **Next**.
11. In the *Ready to Install the Program* dialog click **Install**.
12. At the completion of the install, click **Finish**.
13. DO NOT install the Workstation on the Document Server.
14. Exit the Launch Pad.

Post Upgrade Server Procedures

1. Start the Web site where Document is installed
   a. Right-click **My Computer** and choose **Manage**.
   b. In the Computer Management section, expand Services and Applications.
   c. Expand Internet Information Services.
   d. Expand Web Sites.

     e.   Right-click the Document web site and choose **Start**.

     f.   Click on Web Service Extensions

     g.   Verify that ASP .net v2.0.50727 is set to Allow

     h.   Right-click on the Document web site and Choose Properties

     i.   Select the ASP.NET tab and verify that 2.0.50727 is selected in the dropdown

     j.   Select OK and close the Computer Management console

2.   Launch Internet Explorer and log into http://<document server name>/documentadmin using the User Name = administrator and the Password = password

     a.   Click the **Database Link** in the Manage section and verify that all fields are populated. Click the **Test** button to verify database connectivity.

     b.   Log out of the Document Administrator Home Page.

Configure Services on the Document server

NOTE: All services have a default Start Delay of 2 minutes.

1.   Document Watcher

     a.   Select Start | Programs | <product name> Document | Document Watcher. The Document Watcher Icon will appear in your system tray.

     b.   Right-click the icon and select **Setup**.

     c.   Enter a default Class Name, Subclass Name, Default Year, and Expiration Years which will be applied to all documents cataloged by the Document Watcher Service.

     d.   Click **Save, OK**, and **Close** the window.

     e.   Right-click the icon and select **Start**.

2.   Routing Queue

     a.   Select Start | Programs | <product name> Document | Routing Queue.

     b.   In the task bar, Right-click the **Routing Queue** icon and select **Setup**.

     c.   Enter the Account ID, click **Get Offices** and then choose the companies that you want the Routing service to monitor. Click **Finish**.

     d.   Right-click the **Routing Queue** icon and select **Manage Routing Queue** and select **Start/Continue**.

3.   TaxDocuWatch

     a.   Select Start | Programs | <product name> Document | TaxDocuWatch.

     b.   In the task bar, right-click the **TaxDocuWatch** icon and select **Setup**.

     c.   Enter the Account ID, click **Get Offices** and choose the companies that you want the TaxDocuWatch to monitor. Click **Finish**.

     d.   Right-click the **TaxDocuWatch** icon, select **Manage TaxDocuWatch** and select **Start/Continue**.

NOTE: If the services fail to start, the service Logon password must be changed. From **Administrative Tools/Services** right-click the service, select **Properties** and in the properties dialog select the **Logon** tab and reset the password. Perform for each service.

III. **Install Portal**

1. Log in to the Portal Web server.
2. Browse to the install location for the Portal and copy the following files to the server desktop:
   a. C:\Program Files\<product name>\ClientPortal\web.config
   b. C:\Program Files\<product name>\ClientPortal\Bin\client.exe.config
3. Run Setup.exe from the Downloaded install package
4. On the launch pad, click the Document Server button.
   a. If required software has not been installed, a screen displaying the required software that must be installed is displayed.
   b. Click **OK**. After software installation has completed, the InstallShield Wizard will resume.
   c. The 3.8 installer launches. Click **Next.**
   d. Accept the License Agreement and click **Next**.
15. The *Install Document to* folder will display with the default location populated in the *Destination Folder* dialog.
   a. Accept the default or click **Change** to browse to and select a different path.
   b. If the 3.7 Portal is not installed to the Default Web Site, select the Web site where the Portal is installed and click **Next**.
16. For the *Logon Information* dialog, enter your Document domain administrator account information (or if the Portal is installed in a DMZ and is not on the domain, use a local administrator account). Click **Next**.
17. Browse to the Portal install location folder and open **fxperm02**. Click **Next**.
18. In the *Server Selection* dialog, Document Web Server install options will be available. Uncheck the Document Web Server and Document Application Server boxes and click **Next**.
19. In the *Web and Application Servers* dialog, do the following:
   a. Verify the Portal Server name.
   b. Enter the appropriate Document Server names.
20. Click **Next**.
21. In the *Ready to Install the Program* dialog click **Install**.
22. Click **Finish** to the Completed message.
23. DO NOT install the Workstation on the Portal Server.
24. Exit the Launch Pad.

IIII. Open Internet Information Services Manager and verify that ASP.NET v2.0.50727 is allowed.
   a. Open the Properties of the Document Web site and select the ASP.NET tab.
   b. Verify that the ASP.NET version dropdown field displays *v2.0.50727*.

IV. SSL Configuration
   a. Open the file **C:\Program Files\Prosystem fx Document\ClientPortal\web.config**
   b. Change *http:* to *https:* for the tag <add key="DocUploadHandlerURL" value="http://PortalServerName/clientportal/DocUploadHandler.ashx"/>
   c. PortalServerName must be changed to the external portal address. Example: FirmName.portal.com
   d. **Close** and **Save** the web.config file.

Document Drive Install – Refer to *Document Drive Install* on the installation DVD. The Document Drive must be updated to the 3.8 version on all workstations.