AutoStore 7.0: Upgrading and best practices

Information:

New Features, Fixes and Enhancements of AutoStore 7.0

KofaxAutoStoreReleaseNotes_7.0.6_EN.pdf

Product Upgrade Path

This release of AutoStore supports upgrading from these versions of the software:

- 5.0 and all Service Packs for the following OEM versions of AutoStore 5.0:
  - Express
  - Workflow
  - Enterprise
  - Smart Document Travel
  - KyoCapture
- 6.0 and Service Pack 1 for all OEM versions of AutoStore 6.0

Upgrading from version 5.0 and Service Pack versions of 5.0 is supported only on Microsoft Windows Server 2008 R2 and Microsoft Windows Server 2008 (32- and 64-bit). The AutoStore Installation Guide provides information on installing and upgrading the software. If you are upgrading, make sure to test the configuration on an existing AutoStore 7 server before starting the upgrade process.

Current Maintenance Required

For the following changes current license maintenance is required prior to upgrading to AutoStore 7.0

- Updates
- Upgrades
- New components
- Hot Fixes
Backup of Configuration Files

The following configuration files should be copied from the existing AutoStore Production Server to a safe network storage location. This will serve as a repository in the event that any files are lost or become unusable due to mistakes when making modifications during the upgrade process:

- AutoStore CFG File(s)
- Script or code files associated with AutoStore. This may include:
  - MFD Specific scripts/code files
  - VBScript Process or Route Components
  - AutoCapture Scripts
- Local Access Database(s)
- Icon files (for use with MFD Capture Components)
- CSV or other text data files
- Record Service Account and Passwords for the AutoStore Service

Test Server Environment

Care has been taken to verify the accuracy of information provided in this article, and other documents from Kofax Support regarding upgrading to version 7.0. However, as each customer installation and configuration is unique, it is not possible to account for all scenarios and foresee all specific situations. For this reason, Kofax Support highly recommends that the upgrade is first attempted in a sandbox (test environment). The sandbox should match the production environment as closely as possible in all parameters: hardware, operating systems, other auxiliary or required software, networking, load balancing, fault tolerance features, etc...

Installation of AutoStore 7.0

Refer to the AutoStore 7.0 Installation Guide for instructions on installation of the new AutoStore 7.0 Software on the Test Server. Once installed, follow the licensing instructions in the Installation Guide and use the evaluation license key to license the test server for a 30 day test period. Copy all configuration files identified above to the test server. It is important that paths remain consistent. If the files are copied to a different location on the test server, manual changes will be required to the configuration. It is recommended that any changes be done after preliminary testing is complete and followed up with additional testing. Load the configuration on another AutoStore 7 server to identify any potential issues that may exist between your existing AutoStore CFG files(s) and AutoStore 7.0. Issues may be related to changed, retired, or new components. If any components show as a red icon with a white cross instead of the usual icon please contact support in order to receive appropriate guidance.

Testing AutoStore 7

It is strongly recommended that a test plan be prepared that tests functionality for all AutoStore workflows. It is not
advisable to introduce any new AutoStore Workflows until after all testing of existing workflows is complete. Execute the
test plan and identify any failures or inconsistencies.

Important: For best resolution of issues, document the test cases along with the resulting problems clearly before contacting Kofax Support for troubleshooting assistance. Additionally, be prepared to send sample documents, log files, and screen shots, if requested by Support. It is recommended that the production AutoStore 5.0 or 6.0 Server remain in operation for daily use during the test period. The evaluation license is provided as a measure to ensure ample testing time before migrating the production server to AutoStore 7.0

Migration to Production Environment

Once the test period is complete and all workflows are verified to perform as expected, the following steps outline the process for migrating to production. Based on our experience there are two approaches for migration:

1. Promotion of Test Server to Production Status
   - If the test server is to become the new production server, the AutoStore Licenses on the old production server must first be expired.
   - The new test server can now be licensed as the production server

2. Replacement of AutoStore 5.0/6.0 with AutoStore 7.0 on existing Production Server
   - First, remove the AutoStore 5.0 Software via Windows "Add or Remove Programs" Feature. It is advised that you first remove any AutoStore add-ons, service packs, and hot-fixes that are listed in the Windows "Add or Remove Programs" Feature and then remove AutoStore. Remove these items in reverse numerical order when possible (Example: Remove Service Pack 2, then Service Pack 1).
   - Next, install the AutoStore 7.0 Software following the installation instructions in the installation guide.
   - Apply a new AutoStore 7.0 license. Contact Support at imsupport@kofax.com to get a new INV for your AutoStore 7.0 server. Please reach out to Kofax Support at least 2 business days prior to the scheduled upgrade to request the new v7 INV.

Rollback and Restore Features

Reverting back to 5.0 or 6.0 from a 7.0 installation on the same machine is not supported. Once a system is upgraded from 5.0 (or 6.0) to 7.0 it is not possible to revert back.