Docusnap 11

Upgrade from Docusnap X to Docusnap 11

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1. Introduction

This HowTo describes the upgrade from Docusnap X to Docusnap 11.

Please also note the more detailed HowTos regarding Docusnap 11:

- New features and changes in Docusnap 11
- Installation and configuration

These can be found in our Knowledge Base.

If you encounter problems during the upgrade, please inform our support team:

- E-mail: support@docusnap.com
- Phone: +49 (0) 8033 6978 - 4444

2. Requirements

2.1 General requirements

- For the free upgrade to Docusnap 11 an active service contract or an active lease is required!
- The existing activation key remains valid

2.2 System requirements

Docusnap Client / Docusnap Server

- Recommended is at least Windows 10 / Windows Server 2016
- At least 4 GB RAM or more
- At least 2 CPU cores or more
- .NET Framework 4.8

Database Server

- Version 2017 or higher is recommended
- Please note: If Docusnap and the Microsoft SQL Server, or other software, are on the same system, the hardware requirements must be adapted accordingly.

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3. Upgrade from Docusnap X to Docusnap 11

3.1 Stop active jobs

Before you start the upgrade, check if scheduled jobs are active. If there are active jobs, stop them.

Switch to the tab **Automation - Scheduled Jobs** to check this. You can then stop active jobs using the **Cancel Job** button.

3.2 End Docusnap Client Applications

The next step is to make sure that all Docusnap client applications are closed. An up-to-date overview of which colleagues have opened the Docusnap Client can be found in the status bar of Docusnap X:

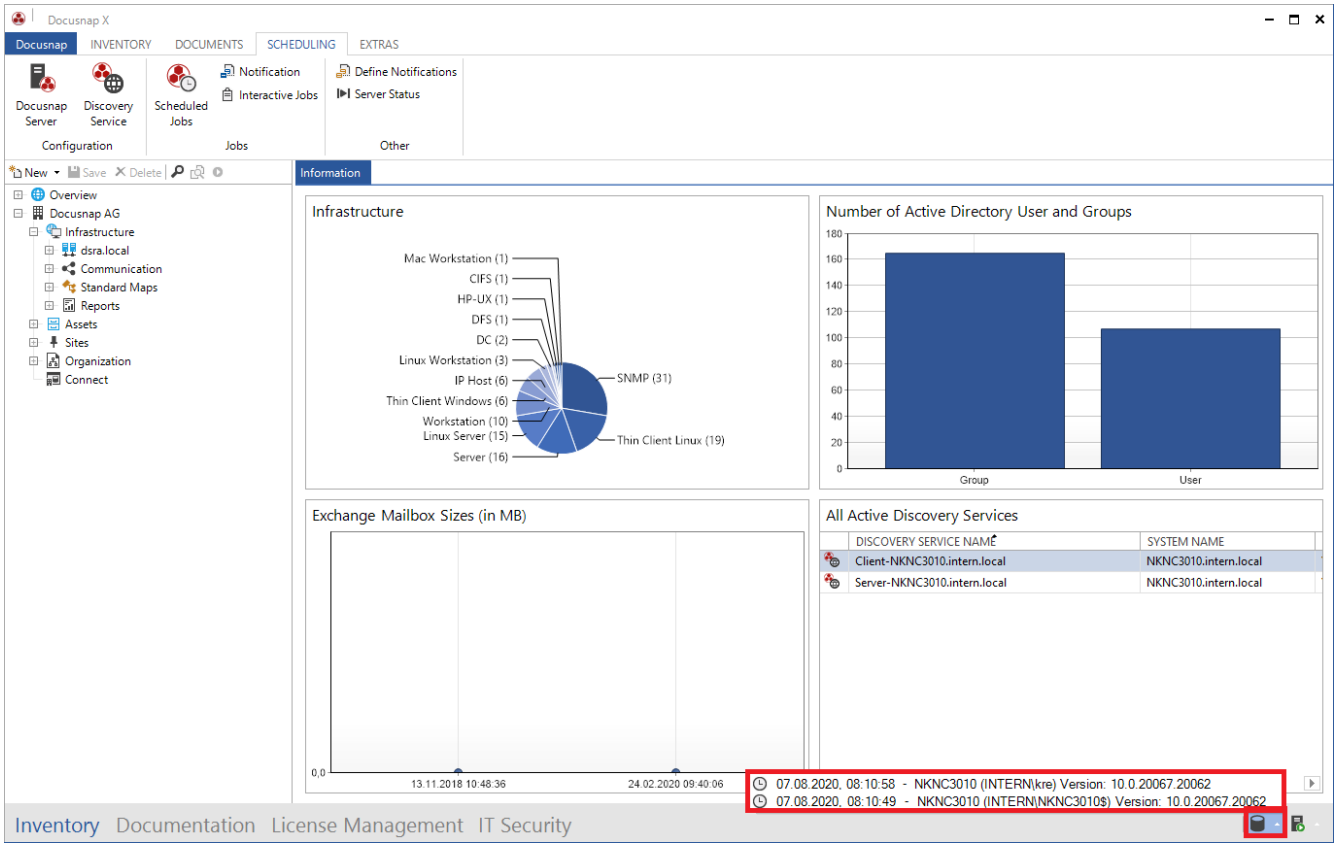

Figure 1 - Check the opened Docusnap client sessions

3.3 Perform a Database Backup

Before updating to version 11, make sure to perform an up-to-date and complete database backup!

Connect to the SQL server via SQL Management Studio and log in.

Select the Docusnap database - right click - Tasks - Backup and make the following settings.

For more information about database backups, please visit docs.microsoft.com

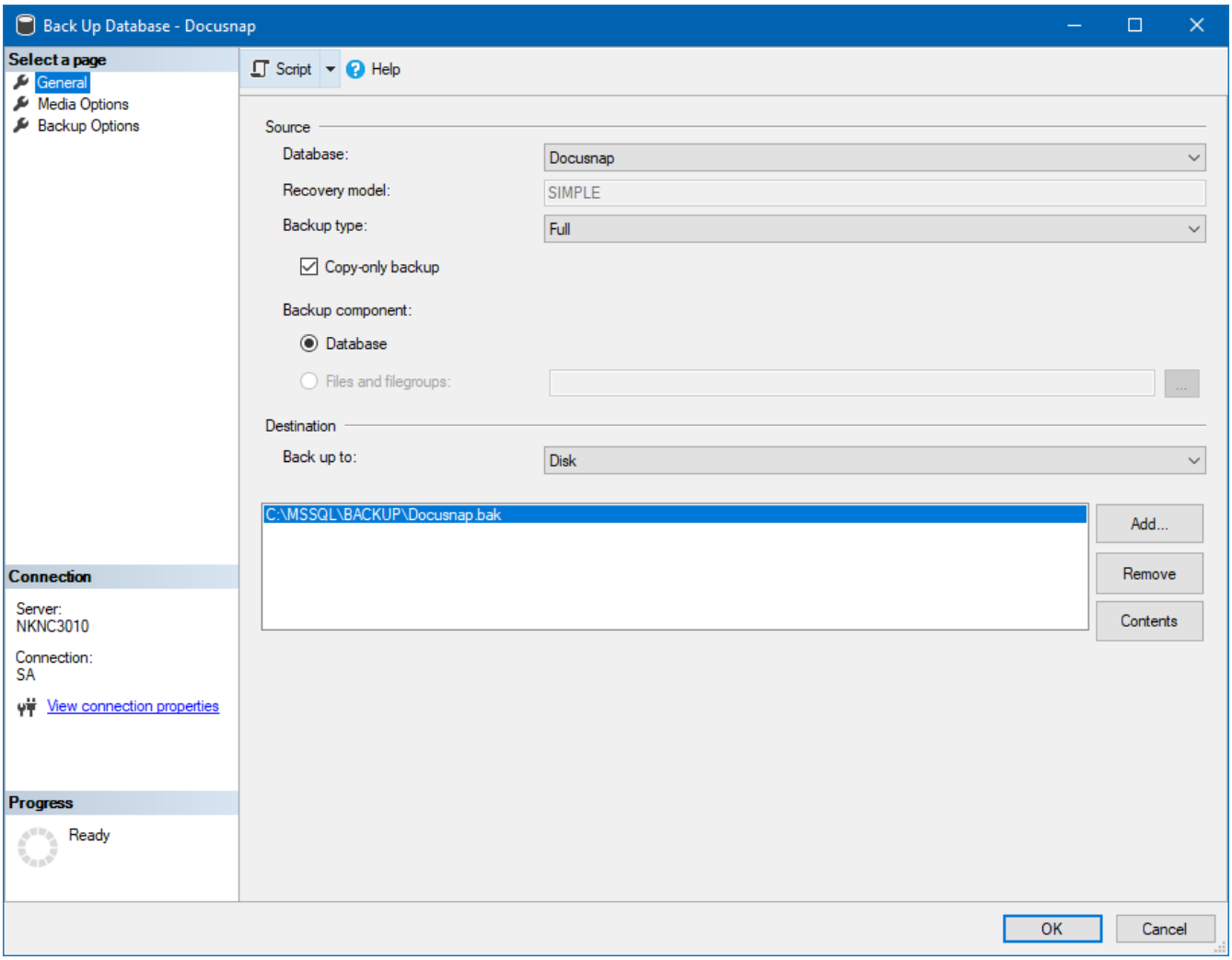

Figure 2 - Perform a full backup

3.4 Start the upgrade on Docusnap Server

You should always start the upgrade from Docusnap X to Docusnap 11 on the Docusnap Server. Establish a connection, e.g. via RDP.

Run the setup for Docusnap 11. If you are already familiar with the installation process of Docusnap X (new installation or updates), you will notice that nothing has changed in this routine. For more information about the installation process, please refer to the **HowTo: Installation and Configuration** in our Knowledge Base.

During the installation Docusnap X will be uninstalled automatically and Docusnap 11 will be installed.

3.5 Perform the database upgrade

After installation, start Docusnap from the newly created Docusnap 11 shortcut on the desktop. If you have started Docusnap X with a central configuration file before, then you must make an adjustment here first - see Using a Central Configuration File - Adjusting Paths. You would recognize this by the fact that after starting the Docusnap 11 shortcut, the configuration dialog is started.

The central configuration file contains all necessary settings for starting and running Docusnap (database connection and system paths).

If you start Docusnap 11 via the newly created link and the following configuration dialog appears, you have almost certainly used a central configuration file.

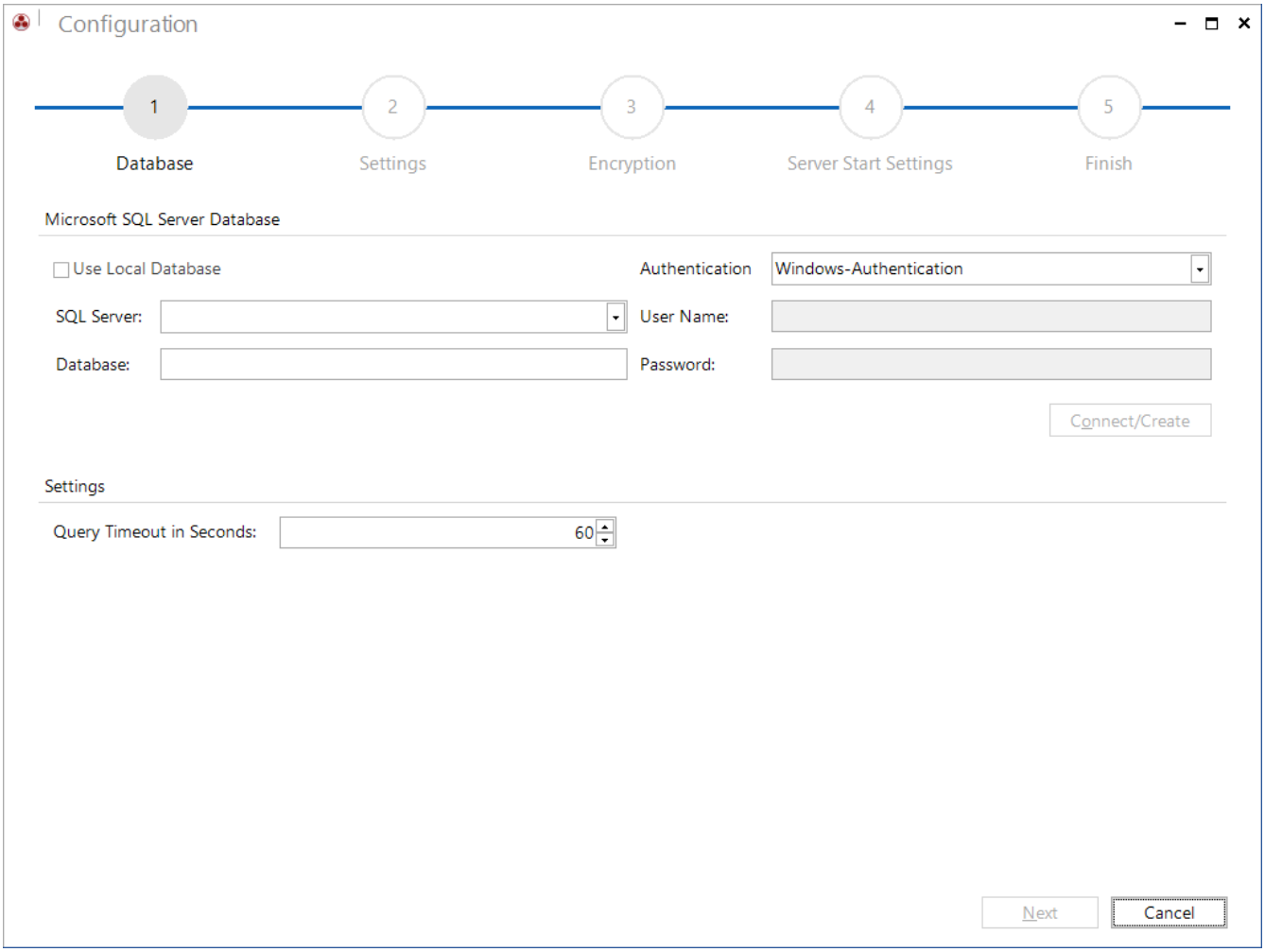

Figure 3 - Docusnap configuration

After the first start, with defined configuration, you will be asked to **update the database** - this must be confirmed.

After the database update has been performed, you have successfully completed the upgrade on the Docusnap server.

3.6 Upgrade Docusnap Client

If you now start a Docusnap Client, you will be prompted to perform the upgrade here as well. The upgrade must be performed, otherwise the Docusnap Clients cannot be started.

Execute the offered upgrade. If you are already familiar with the installation process of Docusnap X (new installation or updates), you will notice that nothing has changed in this routine. For more information about the installation process, please refer to the **HowTo: Installation and Configuration** in our Knowledge Base.

4. Using a Central Configuration File - Adjusting Paths

Within a central configuration file all necessary settings for the operation of Docusnap are stored - e.g. the connection data for the database to be used. The configuration file is called and used with the help of the parameter *-UseConfig* "*\\Server\Sharing\CentralConfig.xml*" when the Docusnap shortcut is called.

For more information about the central configuration file and its setup, see the **HowTo: Installation and Configuration** in our Knowledge Base.

The upgrade to Docusnap 11 creates a new installation directory within C:\ProgramFiles - Docusnap 11.

If you are using a central configuration file to start Docusnap X, the created shortcut must be updated - the installation directory **C:\ProgramFiles\Docusnap X** is no longer available.

To adjust the shortcut, open the properties. The following is entered in target:

"C:\Program Files**Docusnap X**\Docusnap.exe" **-UseConfig \\\Sharing\Folder\Configuration.xml**

Adjust the target as follows:

"C:\Program Files**Docusnap 11**\Docusnap.exe" -UseConfig \\\Sharing\Folder\Configuration.xml

Furthermore, the entry under Start in must also be adapted:

"C:\Program Files**Docusnap 11**"

The paths listed refer to the standard installation directory and may require adjustment.

5. Change Docusnap script files

If you use one of the script variants for the inventory, **you must make sure that the current script files are used** in the future. The used files must be replaced by the new ones.

The following scenarios can be applied when using the script variants:

1. the script files were copied from the program directory and stored centrally
2. the script files are used from the Docusnap program directory

Scenario 1 makes it necessary to exchange the script files in the central repository. This step is necessary after every update / upgrade of Docusnap!
Scenario 2 makes it necessary that you share the new program directory in the network and adjust the execution of the script files accordingly (e.g. within the GPO or the login script).

Script variants exist for the following inventories:

- Windows
  - C:\Program Files\Docusnap 11\Tools\DocusnapScript.exe
  - C:\Program Files\Docusnap 11\Tools\DocusnapScriptLegacy.exe
- Linux
  - C:\Program Files\Docusnap 11\Bin\DSLinux_x32
  - C:\Program Files\Docusnap 11\Bin\DSLinux_x64
- Mac
  - C:\Program Files\Docusnap 11\Bin\DSMac
- Exchange
  - C:\Program Files\Docusnap 11\Tools\DocusnapEX13.exe
  - C:\Program Files\Docusnap 11\Tools\DocusnapExchange.exe
- SharePoint
  - C:\Program Files\Docusnap 11\Bin\DocusnapSP13.exe
  - C:\Program Files\Docusnap 11\Bin\DocusnapSP07.exe
  - C:\Program Files\Docusnap 11\Bin\DocusnapSP10.exe

6. Check upgrade

6.1 Check the status of the Docusnap Server Service

You should have started the upgrade on the Docusnap Server System! Check whether the Docusnap Server has been successfully restarted. You can do this via the title bar - General - Server Status:

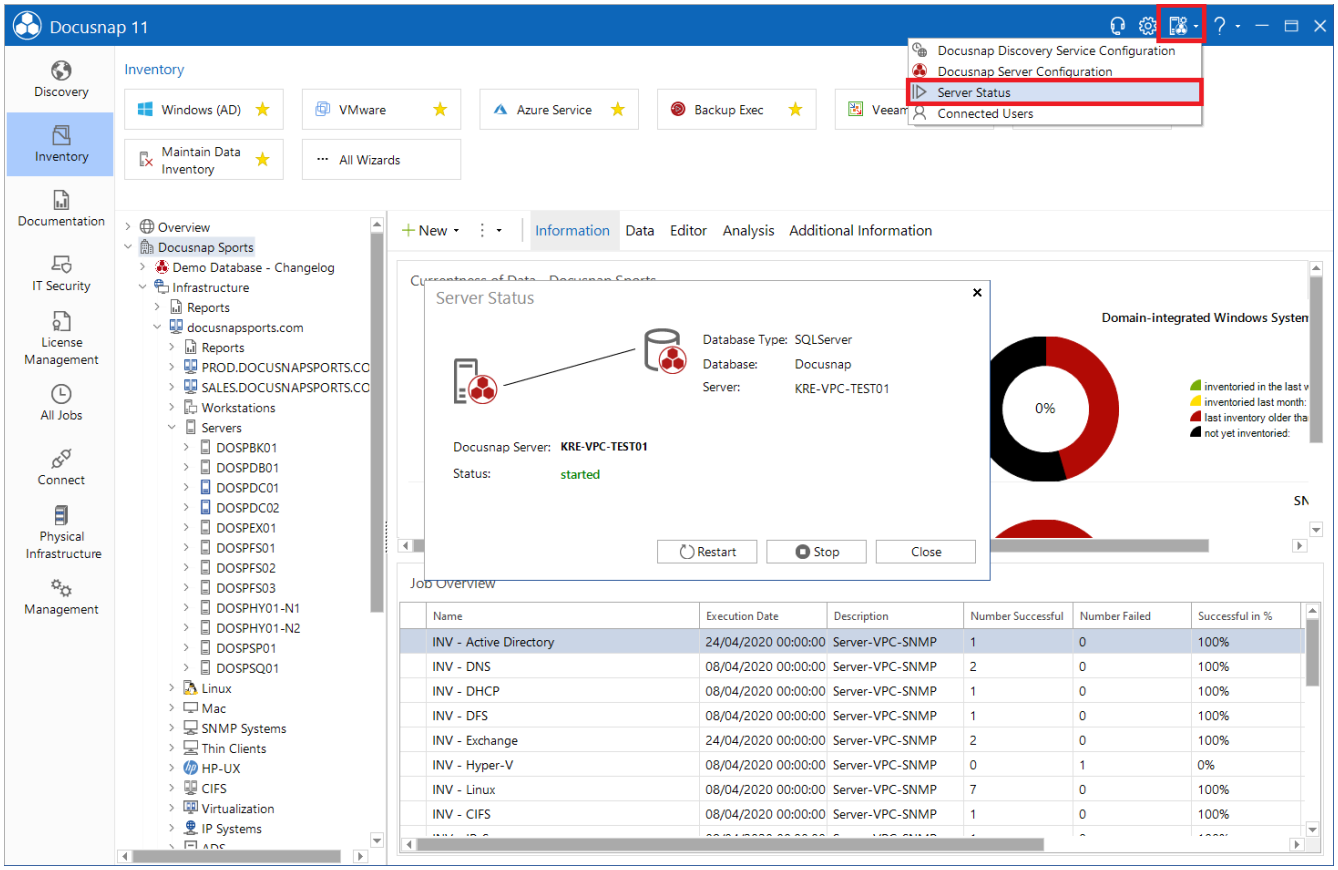

Figure 4 - Check the status of the Docusnap Server Service

If the Docusnap server service is not been started here, please configure it again. You can do this from the title bar - General - Docusnap Server Configuration.

For further information please refer to our HowTo: Installation and Configuration.

6.2 Check status and plugin versions of DDS

In the next step you should check the status and plug-in versions of the Docusnap Discovery Services (DDS) used. The existing Docusnap Discovery Services will update automatically after the upgrade. Depending on how many DDS you have in use and what bandwidth is available, you should calculate one to two hours to complete the upgrade.

A prerequisite for upgrading the DDS is an active Docusnap Server Service.

You can check the status and plug-in versions of the DDS via the title bar - General - Docusnap Discovery Service Configuration:

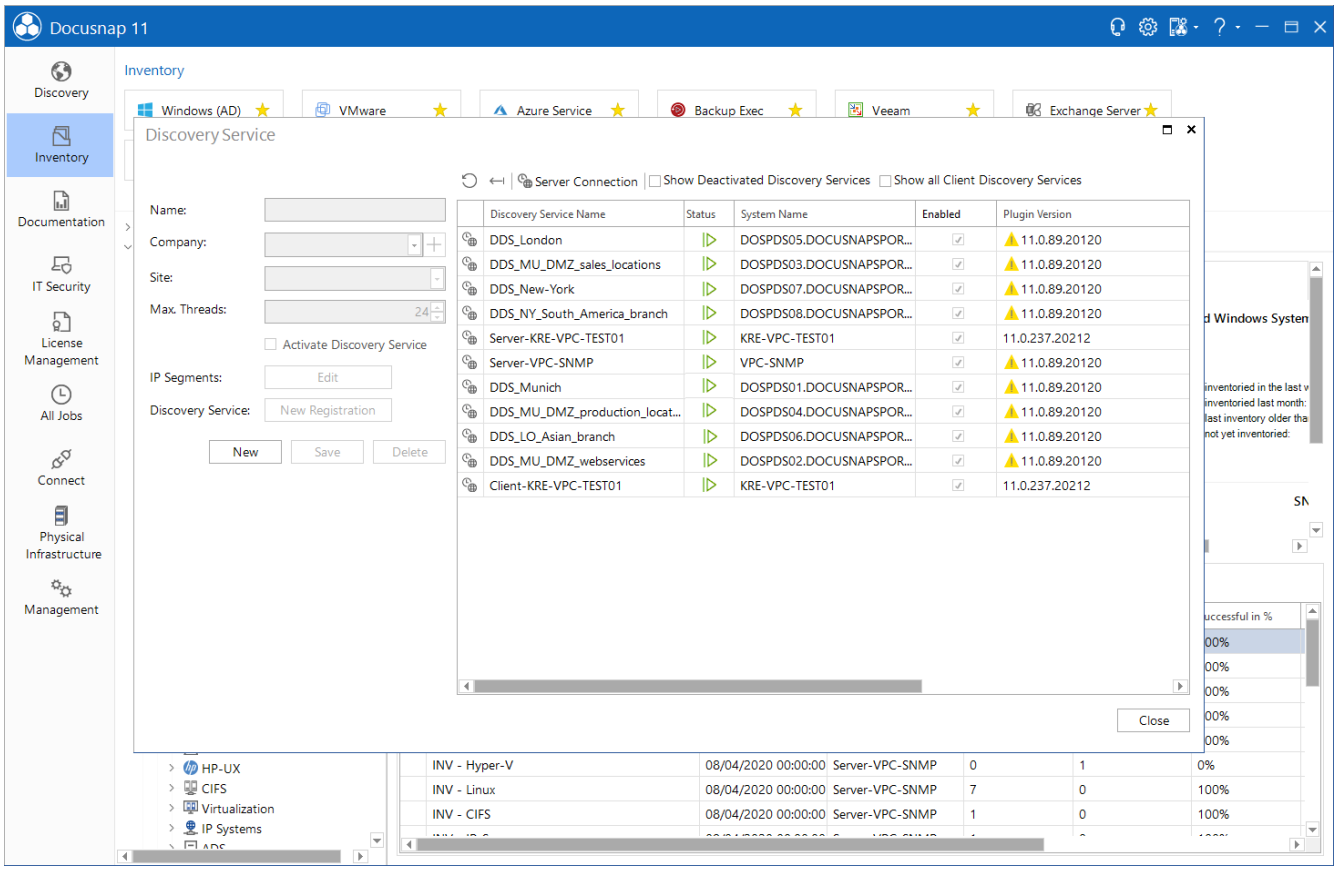

Figure 5 - Status of the Docusnap Discovery Services

7. Checklist for the upgrade to Docusnap 11

- Active service contract / active lease available
- Close all Docusnap Client applications
- Stop active jobs
- Perform database backup
- Download current installation file
- Link to the website: https://www.docusnap.com/support/softwaredownload/
- Remote Desktop Connect to Docusnap Server
- Installing Docusnap 11
  Important: Start upgrade on the server!
    - Adjust paths of the Docusnap link used with central configuration file
    - Start Docusnap
    - Perform database update
    - Replace used Docusnap script files for inventory
    - Check Docusnap Server service status / start manually if necessary
    - Check status and plugin versions of DDS
      Note: Upgrade / Update can take up to two hours
- Docusnap 11 Installation on the client systems
    - Adjust local links with stored configuration file

If you encounter problems during the upgrade, please inform our support team:

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VERSION HISTORY

Date	Description
August 30, 2020	Version 1.0 created
July 12, 2022	Version 1.2 – System requirements updates (.NET Framework 4.8)

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