



Upgrade Guide
Version 5.6

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1 Introduction

This document will enable you to upgrade your Virtual Cabinet System using the 'Virtual Cabinet Setup.exe' file.

Please ensure you have read ALL of the Release Note material that applies all versions **between your current version and the one to which you are upgrading**. Release Notes for all past versions can be found in the [Library section of our Support Centre Website](#). The Release Notes may contain important information about changes to existing features that may impact current working practices.

In summary, the Upgrade Process, which must be run on **all Servers** that host Virtual Cabinet Server Application Components, will automatically download the latest installation packages and run them for you.

The Virtual Cabinet Client Software upgrade process is automatic. Following the Upgrade of the Virtual Cabinet Server(s), the Client, on first run, will detect a new version is available and download it. It will then attempt to execute the installation package for the new version.

Important: The Automatic Client upgrade will only work if the current logged in user on the workstation has local admin rights, or rights to elevate the permissions of the installation when prompted. If the user does not have local installation/admin permissions, the Client software must be upgraded by a user with such rights.

Special consideration should be given to the upgrade of the client software on Terminal or Citrix Servers. It is recommended the client installation is run as an administrator, with the server in any appropriate install mode, whilst there are no users logged on to the server.

2 Upgrade Prerequisites

There are a number of prerequisites and things we recommend to do before upgrading:

- Ensure you have a working Internet Connection on the Servers you are upgrading.
- Ensure you are aware of all Servers that host Virtual Cabinet Server Components as you will need to run the upgrade on each of these Servers.
- Ensure all users are informed they will need to log out of Virtual Cabinet for the upgrade.

3 Upgrading Multi-Server Environments

If you only have a single server that hosts all Virtual Cabinet Server Components, you can skip this section and proceed to section 4 of this document.

If you Virtual Cabinet Server Components are installed on more than one server, e.g. multiple file stores, you will need to run the upgrade on each server.

The single exception to this rule is if you have one server hosting the Virtual Cabinet SQL Server database ("Database Server"), and another server hosting all other Virtual Cabinet Server Components ("Application Server"). In this scenario, you can run the upgrade on the Application Server and the database on the Database Server will be upgraded remotely.

If you have any other multi-server configuration, the process for upgrading each server is as follows:

1. Stop all Virtual Cabinet services on servers other than the one you are currently upgrading. These services include:
 - Virtual Cabinet Business Layer
 - Virtual Cabinet Directory Monitor
 - Virtual Cabinet Indexing Service
 - Virtual Cabinet Portal Integration Service
 - Virtual Cabinet Thumbnail Generator
 - Virtual Cabinet Capture Service
 - Virtual Cabinet Retention Service
2. Run The Upgrade on each server (section 4 of this document). The Upgrade Tool will upgrade all the relevant components, including the database (even if the database is not stored on the current server).

IMPORTANT: Ensure you upgrade all Servers to the same version of Virtual Cabinet.

4 The Upgrade

You will need to perform the following process on every **Server** that hosts Virtual Cabinet Server Components.

4.1 Step 1: Copy the Upgrade Tool to the Server

Copy the '*Virtual Cabinet Setup.exe*' to the Server you are about to upgrade.

4.2 Step 2: Confirm Permissions

Ensure you are logged in to Windows as a user that has full local Admin Permissions and full Administrative rights over the Virtual Cabinet Database.

The Upgrade process will later inform you if you do not have sufficient permissions/privileges but it is worth checking this first.

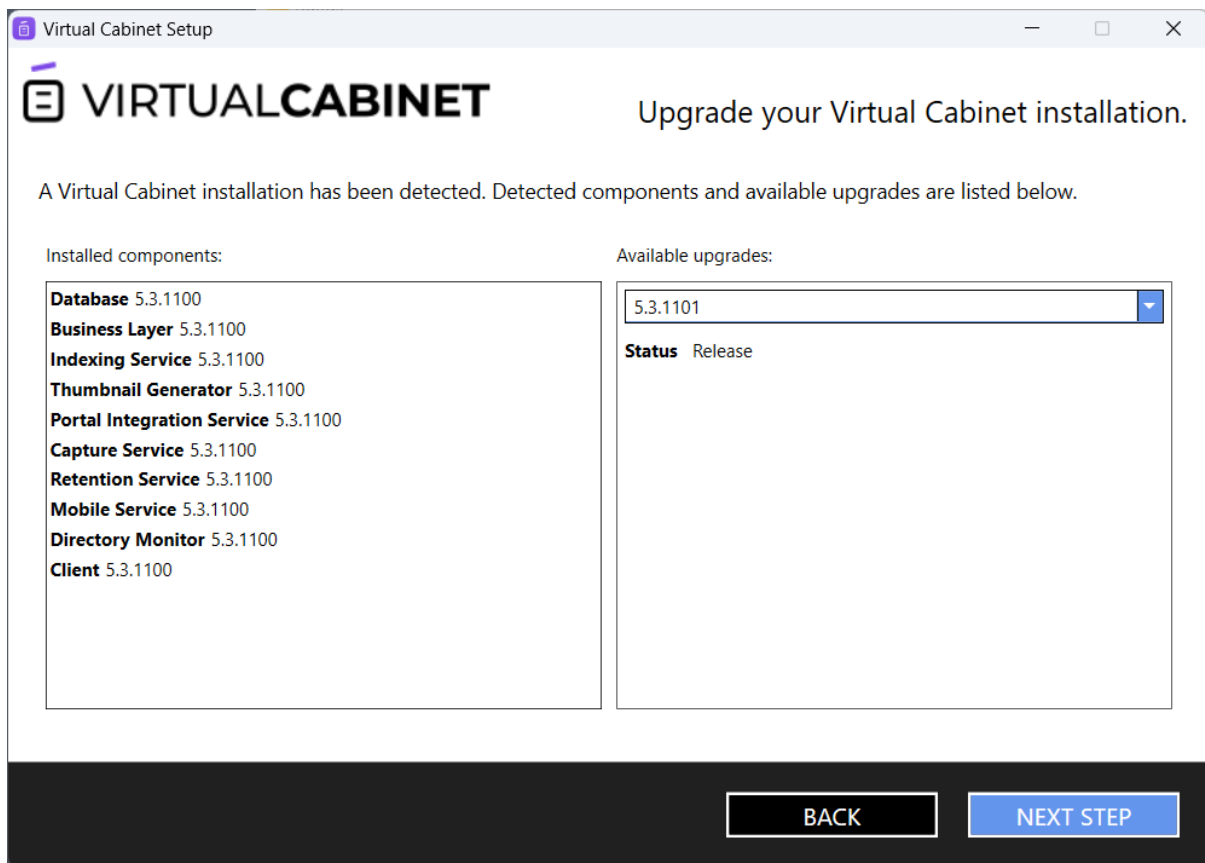
4.3 Step 3: Run the '*Virtual Cabinet Setup.exe*' file

It is recommended that you right click on the Virtual Cabinet Setup.exe and select Run as administrator (if available) to negate any potential Windows permission issues imposed by User Account Control (UAC).

When you run the Setup file, it will automatically detect that you have a Virtual Cabinet system installed, display the current version of the relevant components, and present you with a drop down list of all available Builds that have been made publicly available between your current Build and the most recent. Headline Release Notes will be displayed against each Build where relevant.

Both General Release and Early Adopter Builds will be displayed for selection. More information about our Early Adopter Programme can be found on our website.

Select the Build to which you wish to upgrade.



Click 'NEXT STEP'.

4.4 Step 4: Confirm Windows User Credentials

If you are not prompted to confirm or enter the Windows user credentials used to run the Virtual Cabinet Services then you can skip to the next step in these instructions as the upgrade process has everything it needs to continue to the next step.

If the upgrade process cannot a) determine the Windows credentials required to run the Virtual Cabinet Services and/or b) your current credentials do not have sufficient permissions to perform the upgrade, you will be presented with the following window:

Please enter the Windows user account that the Virtual Cabinet Windows services use to log on as.

User Name	Lindenhouse\VirtualCabinet
Password	••••••••

Please ensure the User Name and Password are entered correctly. You will be prompted if they cannot be validated.

Click 'NEXT STEP'.

4.5 Step 5: Review

You will be presented with a summary of the components that will be upgraded, along with their respective installation locations.

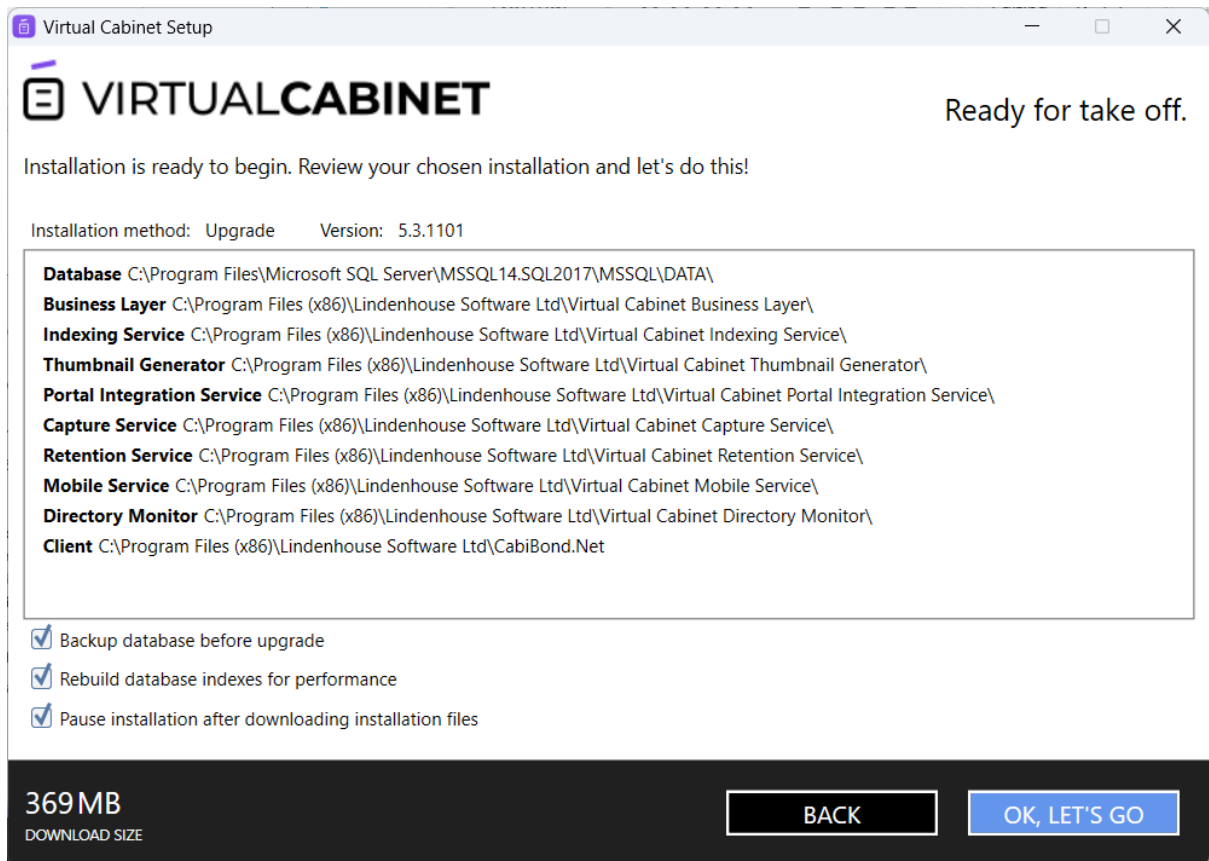
The **Backup database before upgrade** option is selected by default. The Upgrade Tool will attempt to automatically backup the Virtual Cabinet Database. If you deselect this option you will be prompted to confirm you have taken a backup manually. If the Database Backup fails for any reason, you will also be prompted to perform a manual backup.

The **Rebuild database indexes for performance** option will improve performance by cleaning up your database indexes. We would recommend database indexes to be rebuilt regularly.

The **Pause installation after downloading installation files** option is selected by default. This simply means the download of the required components will occur and then the Upgrade Tool will pause, prompting you to ensure all users are logged out of Virtual Cabinet before continuing to take Virtual Cabinet offline. If you deselect this option, then you should inform users to log out of Virtual Cabinet and remain logged out until the upgrade files are downloaded and the upgrade is complete.

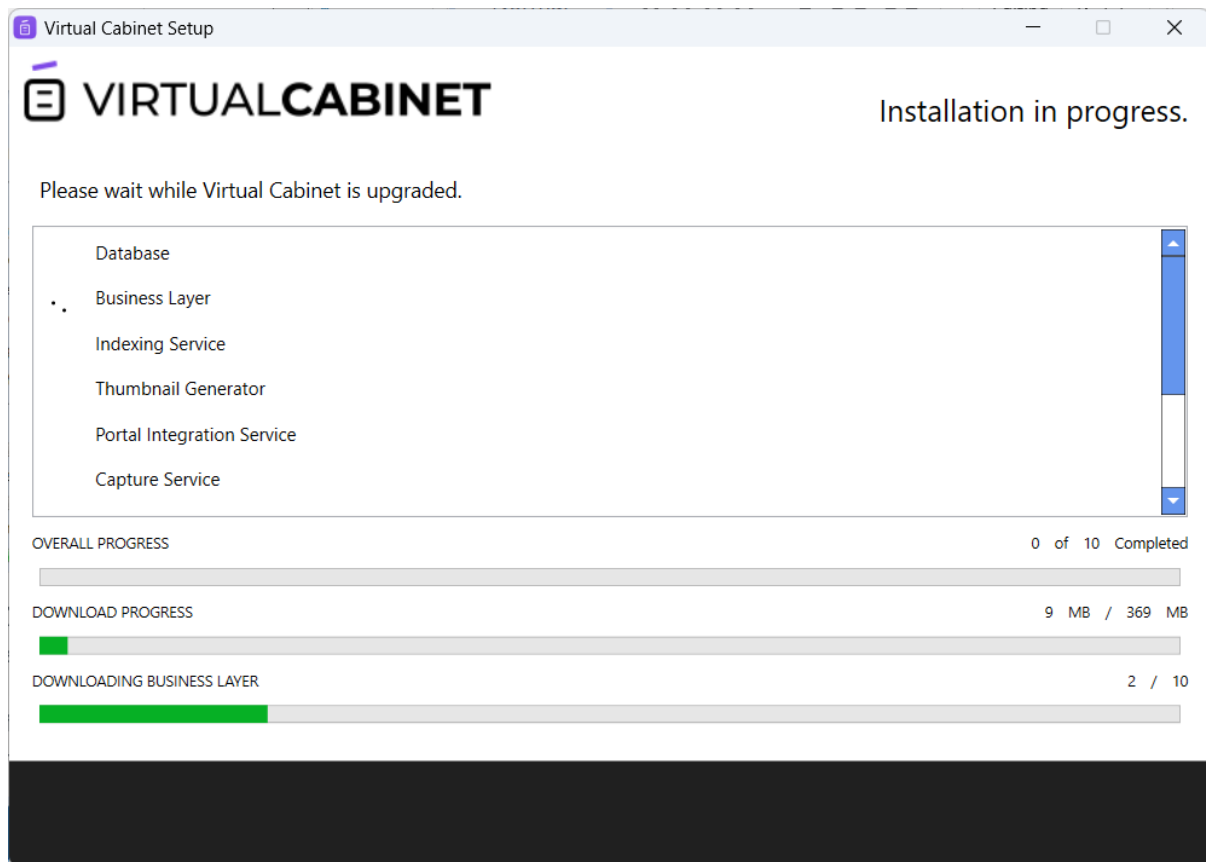
The Installer will download the components it needs from the Internet, an estimate of the size required by these components is shown in the bottom left of this window. The download time will vary depending on your internet connection speed but it is estimated to take between 20 and 60 minutes.

When you are happy, click 'OK, LETS GO' and upgrade process will begin.



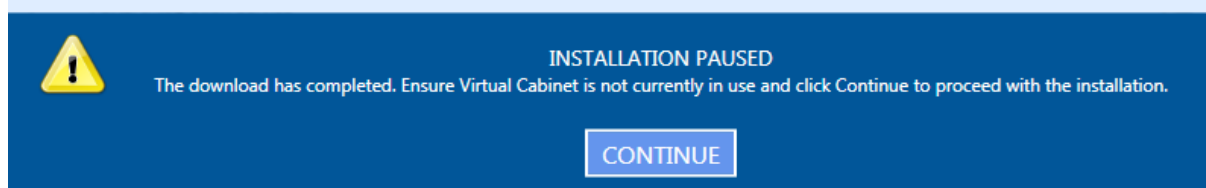
4.6 Step 6: The Download

You will be informed of the download progress in the following window:



4.7 Step 7: Start Upgrade

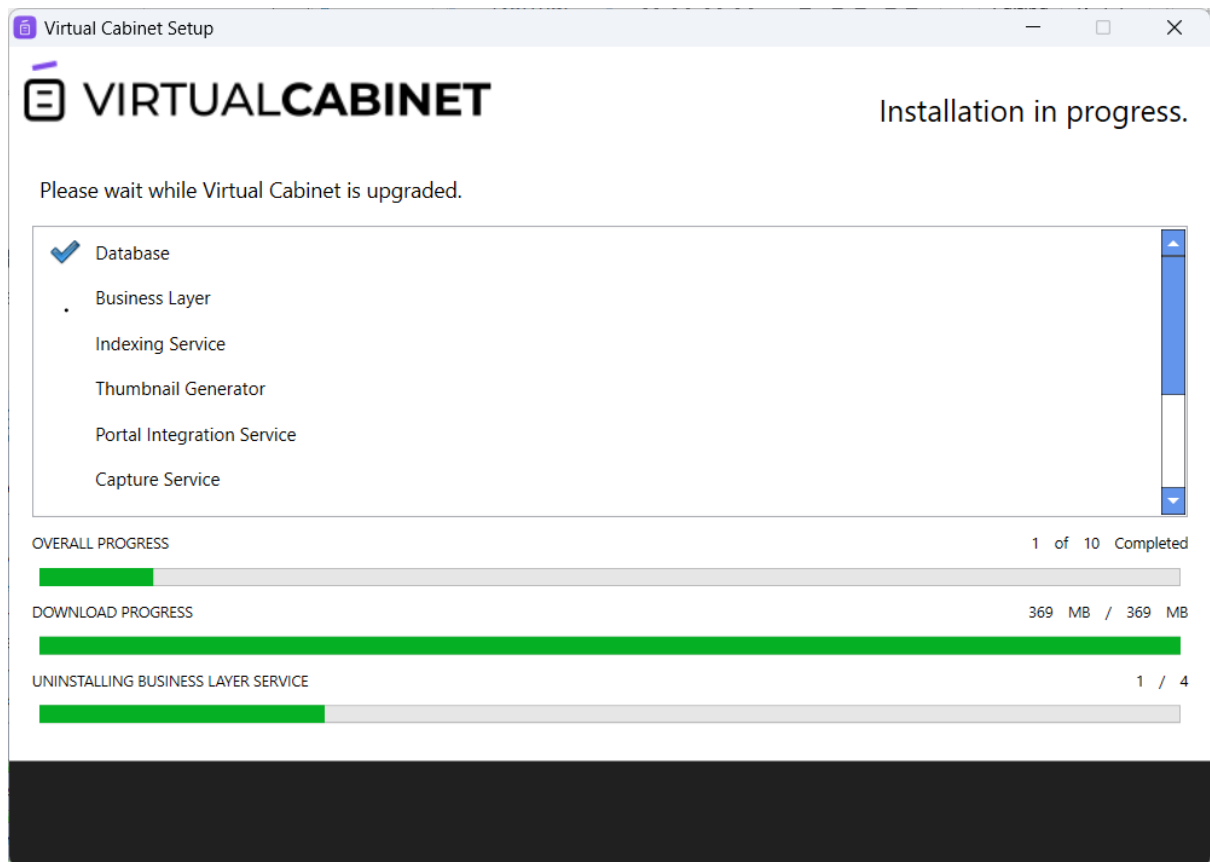
If you deselected the **Pause installation after downloading installation files** option at the Review Step, then the upgrade will start immediately following the successful download of the upgrade files. If you left this option selected (as is recommended), then you will see the following prompt:



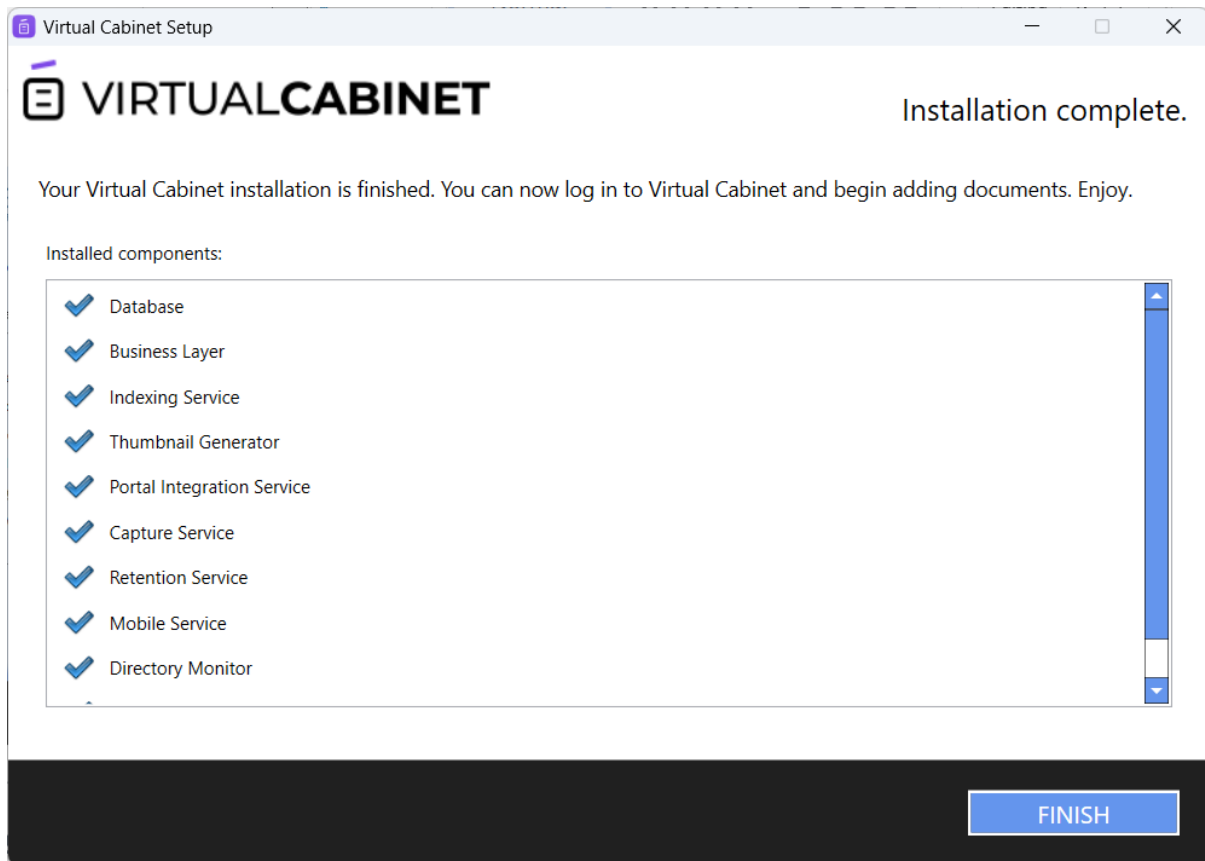
Follow the instructions on screen and click 'CONTINUE'.

4.8 Step 8: The Upgrade

The Upgrade Tool performs the upgrade, providing progress feedback along the way:



When the upgrade is complete, the Virtual Cabinet Service will be started and the progress window will appear as follows:



Click 'FINISH'. The Virtual Cabinet Server Upgrade on the current Server is complete.

4.9 Step 9: Log in to Virtual Cabinet

Following the upgrade on each server, check that you can successfully log in to Virtual Cabinet.

4.10 Step 10: Upgrade the Client Software

Perform the Client Software upgrade, noting the information contained in the introduction of this document.

5 Log Files

Log files can be useful if an issue is encountered during the upgrade. Log files are located in:

C:\ProgramData\Lindenhouse Software Ltd\Virtual Cabinet Install\Logs

The main log file has the naming convention '*Installation {Date Time}.txt*'

6 Packaged Upgrade

A Version Specific Packaged Upgrade that negates the download of the upgrade installation files can be provided to Virtual Cabinet Providers on request.

An internet connection is still required in order to check that the Virtual Cabinet Subscription / Support Agreement is valid and register the upgrade attempt.