



V1
Document
Management

Document Automation for CloudHR

Upgrade Guide

24th September 2019

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Pre-Requisites

Before you start an upgrade, you must have the following to hand:

From the V1 Account Manager:

Request calls for:

- SmartDeposit.cal
- SmartPortal.cal
- SmartRetrieve.cal
- SmartRetrieveERP.cal

From the Customer:

- Connection details of the Mail Server the customer uses
- Request the creation of a dedicated mailbox on that server for use with the integration
- Credentials for that mail box

On the V1 Server:

- Via the SQL Management Console, access to a SQL Server instance, 2012R2 onwards
- Credentials to access an instance on this SQL Server

On the CloudHR Server:

All MailMerge documents to be archived are 'tagged' with the appropriate formulae in the header section.

The sample PDF that comes with this distribution opened and viewed as a text layer (using [FoxIT](#) for instance) will display the requirements.

Once the above are ready / to hand, you can proceed with the installation.

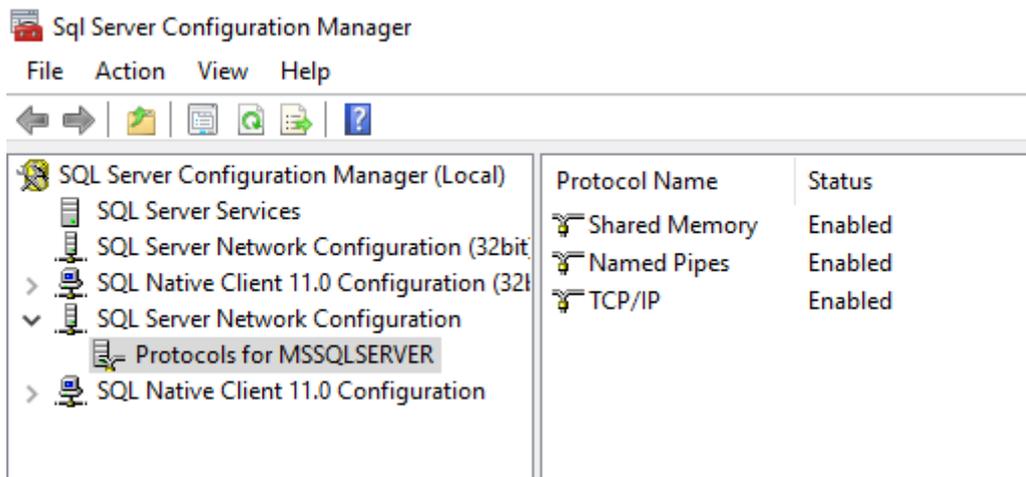
Follow the chapters to the letter, if all goes well it should take no more than an hour to have a system up and running.

Server In-Situ Upgrade

An in-situ upgrade is one where the existing OpenHR V1 Document Management system is upgraded on the assumption CloudHR has been installed.

Configure SQL Network Configuration

In our **example** we'll assume a SQL instance called **MSSQLSERVER**, using the **SQL Server Configuration Manager**, make sure TCP/IP and Name Pipes are enabled:



NOTE: You will have restart the SQL Server instance service for the change to take effect.

Upgrade the Binaries

Stop the DbLogin Service
Stop the DbArchive Service(s)

Uncompress the Cloud_HR_DM.zip to a temporary location on disk.

For our **example**, we will assume C:\temp\Cloud_HR_DM.

Copy and paste the following directories into the C:\V1Home dir:

```
\Server\Cloud_HR_PDF_Pickup  
\Server\DbPDF  
\Server\Utils
```

So you end up with:

```
C:\V1Home\Cloud_HR_PDF_Pickup  
C:\V1Home\DbPDF  
...
```

And so on.

Copy and Paste files your NEW licences

From the licenses you received:

Copy all the *.cal files into the C:\V1Home\DbLogin\cals dir

Configure DbArchive.ini

DbArchive.ini holds the connection information for the service installed in the next chapter to the database, DbLogin and the SmartSuite.

1. Using a suitable text editor (such as [Notepad++](#)) open file explorer and edit the C:\V1Home\DbArchive\dbarchive.ini
2. Add this value amongst the existing settings:

```
FILLARCHIVEUPDATE=1
```

3. Add this value amongst the existing settings, where **value** is the server-name:

```
NIS=http://VALUE:6181
```

4. Save the file

Install the NEW PDF Pickup Service

Open a command prompt **as administrator** and enter the following commands.
Do not copy and paste them from this document, type them in:

PDF Pickup Service

```
Cd /d C:\V1Home\CloudHR_PDF_Pickup
Press Enter
CloudHR_PDF_Pickup.exe -install "V1 - PDF Pickup" C:\V1Home\CloudHR_PDF_Pickup\CloudHR_PDF_Pickup.ini"
Press Enter
```

Restart the DbLogin and DbArchive services, start the V1 PDF Pickup Service

Open services.msc

You should see your 4 services, right click on each and click Start to start them.

 V1 - DbArchive - Read Service - 31418	DbArchive Server
 V1 - DbArchive - Write Service - 31417	DbArchive Server
 V1 - DbLogin	V1 User and Configuration Management
 V1 - PDF Pickup	V1 file watcher

Install the SmartSuite

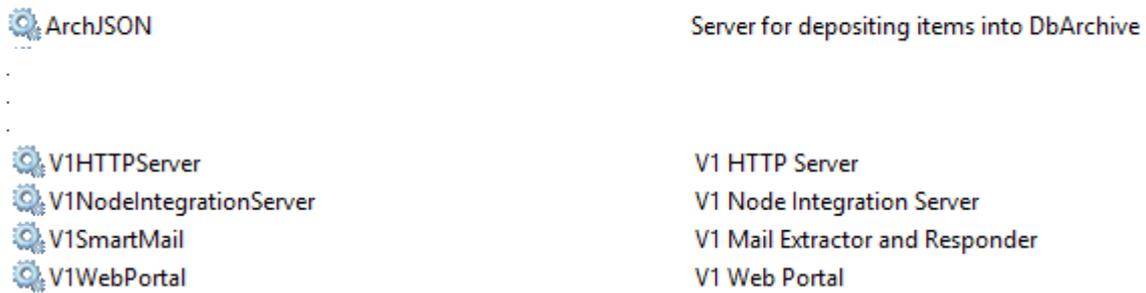
Navigate to the C:\temp\Cloud_HR_DM directory you un-compressed the files into earlier
Run the following MSI's in this order and agree to the defaults:

1. Server\SmartSuite\ArchJsonSetup.msi
2. Server\SmartSuite\NISSetup.msi (this one will take several minutes, this is normal)
3. Server\SmartSuite\WebPortalSetup.msi
4. Server\SmartSuite\HTTPServerInstaller.msi
5. Server\SmartSuite\SmartMailInstaller.msi

Start the SmartSuite Services

Open services.msc

You should see your 5 new services, right click on each and click Restart.



NOTE: By default, the SmartMail Service is set to manual.

You are advised to set this to Automatic once it has been satisfactorily configured.

Configure the SmartSuite

The SmartSuite is the generic term for the V1 Web interface allowing the depositing and retrieval of images, named SmartDespoit and SmartRetrieve respectively.

1. Open your web-browser of choice
2. Navigate to <http://localhost:5002>
3. The 'first run' config screen appears, change the 'nis server address' and port number from `http://127.0.0.1:6181` to the name of the server you are installing on.

So for example, if your server name is MYSERVER123, the 'nis server address' would be:

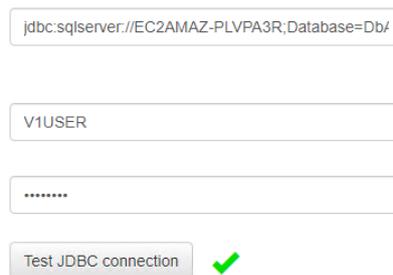
<http://MYSERVER123:6181>

*NOTE: Ensure to **not** put a trailing slash at the end of this URL*

4. Click OK
5. In the Archive JSON Configuration, again change the server name to the name or IP address of the server you are installing on
6. Scroll down to the jdbc connection, remove the example. This value should be the SQL instance name where EDM has been installed, a ; then Database=DbArchive

NOTE: An Example would be `jdbc:sqlserver://MYSQLSERVER/SQLINSTANCE;Database=DbArchive`

7. Enter the same user and password you entered in the setup program
8. Click Test JDBC connection until you see a green tick



The screenshot shows a web form for configuring a JDBC connection. It contains four input fields and one button. The first field contains the text 'jdbc:sqlserver://EC2AMAZ-PLVPA3R;Database=Db/'. The second field contains 'V1USER'. The third field contains a series of dots representing a password. The fourth field is a button labeled 'Test JDBC connection' with a green checkmark icon to its right, indicating a successful test.

9. Click the Data Handling tick box ensuring STRING fields are handled as UTF-8
10. Scroll to the bottom of the screen, in the License server section, click Test connection
11. Click OK
12. You should now see a login screen, this is an indication everything is good to go
13. Close your browser

Re-style the SmartSuite

This is very much optional, but changes the look and feel of the SmartSuite UI to that of an Advanced product so is recommended.

Using Windows File Explorer, from the un-compressed files in the C:\temp\Cloud_HR_DM\SmartSuite\Styling directory:

Copy the deposit.png, retrieve.png, dashboard.png and retention.png in to:

C:\V1Home\V1Web\WebPortal\source\v1\modules\launcher\images

Copy the v1LogoRedWhite.jpg, v1LogoRedWhite.png, dashboard.png, versionone_brand.jpg and versionone_brand.png in to:

C:\V1Home\V1Web\WebPortal\source\v1\modules\core\images

Copy custom.css in to:

C:\V1Home\V1Web\WebPortal\source\style

Copy login.tmpl.html in to:

C:\V1Home\V1Web\WebPortal\source\v1\modules\auth\html

Copy favicon.ico in to:

C:\V1Home\V1Web\WebPortal\source\

Configure SmartMail

1. Using File Explorer, navigate to C:\V1Home\Utils
2. Right click and run **as administrator** the **start_services_debug_smartmail.bat** (this starts the V1 Smart Mail service in debug mode).

NOTE: V1 Smart Mail can only be configured in debug mode to prevent erroneous usage

3. Open your Web Browser of choice and navigate to <http://localhost:8444>, this is the configuration screen

General Configuration

4. Set log mode to console and file
5. Set Log Level to log errors only
6. Set Store log file Audit to yes
7. Set Purge log files older the # days to 30
8. Using File Explorer, ensure the path to cscript.exe is correct
9. Set cycle mailBoxes to run continuously
10. Set poll time in seconds to be no lower than 30, 60 seconds or higher is advised
11. Click the dustbin icon to remove any sample Mail Servers

Add your mail server

12. Click the Add new Server icon to add a new server
13. Enter your intended mail server configuration, give it a meaningful name as it will be used to identify it

Add your inbound mailbox

14. Click the dustbin icon to remove any sample mail boxes
15. Click the Add new Mailbox icon to a new mail box
16. Add an identifier of V1DM
17. Ensure the Server ID is the same as the one configured
18. Enter an email address provided by the customer such as cloudhr@mycompany.com
19. Enter the password to access this mailbox
20. Click the box Enabled
21. In the first dropdown, select EXTRACT as the action
22. Where prompted for File extensions, enter PDF
23. Supply an Attachment path of C:\V1Home\CloudHR_PDF_Pickup_POLLDIR\SMARTMAIL
24. In the dropdown below, select DELMSG
25. Click OK
26. Scroll to the bottom and click SAVE CONFIGURATION
27. You will see a promise message confirming the commit of the settings, close your browser

Client Component Installation

Update the DbLogin Admin Console

This is needed to administrate the system, you are recommended to install it on the V1 Server, but can also go on any client machine with http/s access to the V1 Server.

1. Navigate to the C:\temp\Cloud_HR_DM directory you un-compressed the files into earlier
2. Run the following MSI and install it over the top of the existing one:

```
Client\DbLogin Admin Console\DbLoginAdminConsole.msi
```

3. Navigate to the C:\temp\Cloud_HR_DM\Client directory you un-compressed the files into earlier
4. Copy the plugins dir to your clipboard
5. Paste the plugins dir into the C:\Program Files (x86)\V1\DbLogin Admin Console dir over the top of those already there

Restyle the DbLogin Admin Console

This is very much optional, but changes the look and feel of the V1 Clients UI to that of an Advanced product so is recommended.

Using Windows File Explorer, from the un-compressed files in the C:\temp\Cloud_HR_DM\Clients\Styling directory:

1. Run V1Styling.Msi and agree to defaults
2. Copy the Controls.isl, favicon.ico, Forms.vssf and MasterLogo.jg plugins dir to your clipboard
3. Using File Explorer, navigate to C:\Program Files (x86)\Common Files\Version One Shared\Styles\Current dir
4. Paste your files over the top

Allocate licenses to users

Now the users have been set, you can create users you wish to have a login into the SmartSuite to deposit and retrieve images.

New V1 Server Upgrade

A new server upgrade is one where the existing OpenHR V1 Document Management system is migrated to a new V1 Server on the assumption CloudHR has been installed.

For this example, we will assume the old OpenHR server is **SERVERA** and the new V1 Server is **SERVERB**.

To aid a smooth upgrade process, it's advisable to have access (via remote desktop for instance) to both **SERVERA** and **SERVERB** at the same time.

We will assume in both cases, V1 has been installed to the C:\V1Home directory.

Install the Software on the new V1 Server

Follow the Server [V1 DM CHR – Installation Guide](#) in full as you would a new installation, then return to this section.

This gives you a baseline system, but will lack the current users and documents from OpenHR on **SERVERA** they have been using previously.

These will now need to be migrated to the new V1 Server installation on **SERVERB**.

Import Existing DbLogin Configuration

1. On **SERVERB**, stop the DbLogin service.
2. Take a backup of the directory and rename it DbLogin.BASELINE
3. From **SERVERA**, take a copy of the C:\V1Home\DbLogin directory
4. On **SERVERB**, paste this into the same place, i.e. C:\V1Home\DbLogin
5. On **SERVERB**, navigate in to the C:\V1Home\DbLogin.BASELINE directory and take a copy of the DbLoginServer.exe
6. Paste it over the top of the one in C:\V1Home\DbLogin
7. Start the DbLogin service

Your users and configuration have now been migrated.

Import Existing DbArchive Database

1. On **SERVERB**, stop the DbArchive Service(s)
2. On **SERVERA**, using SQL Management Studio, take a backup of the DbArchive Database
3. On **SERVERB**, drop the new DbArchive database (i.e. the one created as part of the new install containing no data)
4. On **SERVERB**, restore the backup you took on **SERVERA**
5. On **SERVERB**, take a backup of the DbArchive directory and rename it DbArchive.BASELINE
6. From **SERVERA**, take a copy of the C:\V1Home\DbArchive directory
7. On **SERVERB**, paste this into the same place, i.e. C:\V1Home\DbArchive
8. On **SERVERB**, navigate in to the C:\V1Home\DbArchive.BASELINE directory and take a copy of the DbCSArchiveServer.exe
9. On **SERVERB**, navigate in to the C:\V1Home\DbArchive.BASELINE directory and take a copy of the dbarchive.ini
10. Paste both files over the top of those in C:\V1Home\DbArchive
11. Start the service(s)

Your data has now been migrated.

Final Steps

Before use, whether in-situ or new installation, it's a good idea to do a final rebuild of indexes and restart all services to ensure the system is ready for use.

- In our **example**, the server IP address where V1 has been installed is **V1CLOUDSERVER**, **change as appropriate**
 1. In your web browser of choice, browse to <http://V1CLOUDSERVER:5002>
 2. Login as administrator / administrator
 3. Change the url from <http://V1CLOUDSERVER:5002/portal> to <http://V1CLOUDSERVER:5002/config> and press enter
 - a. This is a back door to the config and not exposed for general use
 4. Click Configure integration server
 5. Scroll down about half way and click the button 'Rebuild all search indices'
 6. Nothing will apparently happen, but no errors assume a successful rebuild.

You're ready to go!