



How to Upgrade ArchiveOne® Enterprise (Policy)

Applies to: ArchiveOne Enterprise (Policy); Topic Last Modified: 26th July 2010.

Note

This topic explains how to upgrade ArchiveOne Enterprise (Policy).

Before You Begin

Before you perform the procedure in this topic, be aware of the following:

- You must have an account which has the necessary permissions to run ArchiveOne Express.

Procedure

The upgrade process is broken down into the following steps:

1. Prepare Upgrade Prerequisites:
 - a. Determine Configuration type.
 - b. Determine the name of the Exchange, and configuration (add-ins share) servers.
 - c. Determine ArchiveOne Service account.
 - d. Download the ArchiveOne Enterprise (Policy) software.
2. Use **Add / Remove** programs to remove the current ArchiveOne Enterprise (Policy) installation.
3. Run the newly downloaded ArchiveOne Enterprise (Policy) installer.
 - a. Upgrade the Search and Retrieval server if necessary.
4. Upgrade the Quick Link or Laptop component on the client workstations.

Determining the ArchiveOne Configuration Type

1. Open the ArchiveOne Admin Console.
2. Right click on **Status** and select **Run Configuration Wizard**.
3. Click the **Next** button until you get to the '**Search URL**' screen.
 - a. The server listed on the Search URL screen indicates which server the Search and Retrieval component has been installed on.
 - b. If the server listed is not the ArchiveOne server, you will need to upgrade ArchiveOne components on the server listed in addition to the ArchiveOne server.

Determining the name of the Exchange, and configuration (add-ins share) servers

1. Open the ArchiveOne Admin Console.
2. Click to highlight the **Status** (alternatively titled AOne Engine), in the left column.
 - a. Make a note of the '**Exchange Server**' and the '**Configuration Server**' that is listed under system summary.

Determining the ArchiveOne Service Account and Password

1. Open the Services Management Console.
2. Right click on the **ArchiveOne Enterprise (Policy) Service** and select **Properties**.
3. Click on the Logon tab.
 - a. The account listed in the **'This account'** text box is the ArchiveOne Service account.
4. If you do not have the password for this account, you may re-set it using Active Directory Users and Computers.

Remove the current ArchiveOne Enterprise (Policy) installation

1. Open **Add/Remove** Programs.
2. Highlight ArchiveOne Policy Manager.
3. Click the **Remove** or **Uninstall** button.

Install the Latest Version of the ArchiveOne Enterprise (Policy)

1. Run the newly downloaded ArchiveOne Enterprise (Policy) installer.
2. Click the Next button to initiate the installation.
3. Accept the License Agreement.
4. Correctly set the User Name and Organization listed in the Customer Information screen, and select **Next**.
5. If your Search and Retrieval Component is on another server, then in the Custom Setup screen you will click the pull down menu next to **'Search and Retrieval website'** and select **'This feature will not be available'**.
6. Click the **Install** button in the **Ready to Install** the Program screen.
7. Enter the name of the Exchange Server that was determined earlier in the System Preparation screen.
8. Select whether the configuration is housed locally, on the exchange server, or on another named server.
9. If the group name listed in the Group Creation Summary screen is not the group you're using, then use the **Browse** button to select the correct group.
10. In the User Account Creation Summary screen, use the **Browse** button to add the name of the service account identified earlier.
 - a. Enter, and confirm the password in the space provided.
11. Select **'Allow DCOM access for everyone'** in the DCOM Security screen.
12. Click **Next** in the System Preparation screen after it completes the process.
13. Click **Next** in the Complete System Preparation screen.

If Your Search and Retrieval Component is on another Server

1. Uninstall the existing copy of ArchiveOne Policy on the server hosting the website.
2. Run the newly downloaded ArchiveOne Policy installer on that server.
3. In the Custom Setup screen, select **'This feature will not be available'** for C2C Archive One Policy. Then select **'This feature, and all sub-features, will be installed on local hard drive'** for Search and Retrieval website.
4. Enter the name of the configuration server determined earlier.
5. Click **Install** in the Ready to Modify the Program screen.
6. When prompted, enter the password for the ArchiveOne service account and click the Update button.

Upgrade the Quick Link or Laptop component on the client workstations

1. Open **Add / Remove** programs.
2. Uninstall the installed component.
3. Navigate to the installation directory on the archive Server, which defaults to C:\Program Files\C2C Systems\Archive One.
4. Locate either the ArchiveOne Quick Link Client.msi, or ArchiveOne Laptop Client.msi.
5. Run the appropriate msi on the client PC

For more information

For assistance with other features of ArchiveOne Enterprise (Policy), see the other ArchiveOne Enterprise (Policy) documentation available from C2C:

- [C2C website](#)
- [C2C Support Portal](#)