

# Laserfiche 6 or 7 to 8 Migration Quick Reference

*Quick Reference*

July 2008

**Laserfiche®**

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The following tech paper describes some of the major elements of the Laserfiche 6 or 7 to 8 migration that you should consider before and during a migration. For a step-by-step guide, with additional information on the migration and tips on troubleshooting, see the Migration chapter of the Laserfiche Administration Guide. The guide can be found in C:\Program Files\Common Files\Laserfiche\Documentation\Client\lfadmin8.chm, or by clicking "Help" in the migration utility or in the Laserfiche 8 Administration Console.

## **Source and Target Databases**

When you run the Laserfiche Migration Utility, it will first create a new database using the Version 8 schema, and then copy data from the original version 6 or 7 database to the new one. The original Laserfiche 6 or 7 database will be untouched, and the Laserfiche 6 or 7 server is not utilized at all and does not need to be turned on. Bear in mind that when choosing a source and a target server as part of the migration process, you are specifying the SQL server, not the Laserfiche server.

The target Laserfiche 8 database can be, but does not have to be, created on the same SQL server that contains the source 7 database -- this is why you are prompted for both a source and a target SQL server. Once selected, the migration utility will automatically create the 8 database on the target SQL server. Note that the type of database created, Team vs. United, will depend entirely on the target SQL server. If the target SQL server is MSDE, MSSQL: Personal Edition, or SQL Server 2005 Express, a Team database will be created. Using any other edition of MSSQL or Oracle as the target server will create a United database. If the target SQL server will not be the same used as the production SQL server, it is *very* important to make sure that the appropriate database type will be created -- that is, do not run the migration using an MSSQL: Standard server as the target SQL server and then put the database on MSDE or MSSQL: Personal Edition.

Database migration is an excellent time to perform the conversion from Team to United if you intend to upgrade. The necessary database conversion will be handled automatically as part of the migration, and the migration will correctly create the new database without expansion databases.

## **Thumbnail Data**

The migration utility does not migrate the thumbnail data (LFT table) information by default, as it takes a long time to copy over and will be re-generated the next time any particular document is opened following the

migration. The choice to migrate the thumbnail data is still provided to the user under the 'Advanced' options.

In most cases, we do not recommend migrating thumbnail data, as the Server will regenerate thumbnails whenever they are needed, and migrating the data significantly slows the migration. However, in Laserfiche 8 thumbnails are stored in the volumes to prevent database size increasing. If any of your volumes are read-only or permanent, the Server will not be able to store newly-generated thumbnails in that volume, and will therefore need to regenerate the thumbnail every time it is used, which can slow performance. Therefore, if your volumes are read-only, you may wish to migrate thumbnail data.

## **Fields and Field Merging**

In Laserfiche 8, fields exist in the repository independently of templates. Templates no longer define the fields that they contain; instead, they serve as a collection of fields. Each field name must be unique. By default, if the migration finds more than one field with the same name in the source repository, the first field will keep its original name and succeeding field names will have numbers appended to them. For instance, if a repository has three Author fields, when it is migrated they will be renamed to "Author," "Author(2)" and "Author(3)."

In the Advanced options section of the migration utility, you can choose to attempt to merge identical fields instead of renaming them. Fields can only be merged if their name, field type, security settings and Required status match; additionally, if a default value or constraint has been set for any of the fields, those settings must match as well. If you have chosen to merge fields and those settings all match, the fields will be merged into a single field definition. You can preview which fields will be merged if you enable field merging by running the pre-migration constraint check.

It is also possible to merge individual fields in the Laserfiche 8 Administration Console, after the migration has been completed. This allows you to pick exactly which fields you wish to merge, and allows fields with different properties to be merged.

## **Migrating Audit Data**

The Laserfiche Migration Utility can migrate Laserfiche 7 audit data to the Laserfiche 8.0.1 binary format. The data must still be in the Laserfiche 7 database; if you have purged the data, it cannot be migrated to Laserfiche 8,

since it no longer exists in the database to be migrated. Once data has been migrated from the Laserfiche 7 database to the Laserfiche 8 binary file format, you can run reports on it using the Laserfiche Audit Trail Reporting web application, just as you would any Laserfiche 8 audit data.

You can run audit data migration separately from the rest of the Laserfiche 7 database information. This is useful if you have already migrated your Laserfiche 7 repository and only need to migrate the audit data, or if you have a large amount of audit data and want to break the migration up over two days. To audit only the audit data, point the migration utility at your repository and select “Audit only” in the Advanced Options.

Note that audit data is not migrated into the Laserfiche 8 database, but is migrated directly to the binary log files used by Laserfiche Audit Trail for storage. Laserfiche 6 audit data cannot be migrated.

## **Constraint Check**

A pre-migration constraint check is available in the ‘Advanced’ options section of the Migration Utility. This process will examine the source version 6 or 7 database and provide information on entries that could have problems migrated. Running the pre-migration constraint check is not required – the migration utility will attempt to automatically handle the data regardless of whether the user ran the check. The purpose of the constraint check is to provide advanced users, who have sufficient knowledge of both MSSQL and the 6 database structure, an opportunity to look over some of these problem entries in case they do not agree with the measures (as described in the migration guide) that the Migration Utility will take to automatically handle them.

The pre-migration constraint check will also indicate which fields can be merged if you enable field merging. You can run the constraint check to determine whether you want to enable field merging, or keep it disabled and merge fields by hand after the migration.

## **Registering the Laserfiche 8 Server**

The actual migration process takes place completely independently of the Laserfiche Server. After the migration process is complete, at which point the full target database will be created, the user will be prompted to register the newly created database as a Laserfiche 8 repository. At this point, the migration asks for the Laserfiche Server 8 information. If repository registration fails for any reason, or if the Laserfiche Server 8 is not yet

installed, it is not necessary to re-do the entire migration process. The migration is complete – only repository registration has failed – and thus re-migrating is redundant. If this is the case, simply log into the Administration Console and register the repository there.

## **Windows Paths**

During the repository registration step, the user will be prompted for the Windows file-system path to use as the main repository path. This path is the location of the SEARCH8 directory, as well as the root location for relative volume paths (of the form ‘.\myVolume’) and certain other repository information. This path will not necessarily be the path containing the database files. If the Laserfiche 8 server will be located on the same workstation as the Laserfiche 7 server, the user may be provided with the option to use the same path that was used by the repository with Laserfiche 7. If this option is not available, the user can manually indicate the desired repository path. These files must be stored on the Server machine.

The migration utility does not touch or move the volume files contained in the Windows file system. In most cases, it should not be necessary to move them at all as part of the migration procedure. Bear in mind, however, that relative volume paths are based upon the main repository path – if that path was changed when registering the repository for Laserfiche 8, the server may now be pointing to an incorrect location when looking for these volumes. The final repository registration page contains a ‘Preview’ button which allows the user to see where the server will attempt to find the volumes in the Windows file system. We recommend that you use this to make sure that the displayed volume paths are real and valid. If they are not, the paths should be modified in the Administration Console following repository registration. Checking the volume paths should be considered an essential part of the migration process. If the volume paths are incorrect, the documents contained within those volumes will not be accessible until the paths have been updated.

## **Migration Log File**

The log file generated by the migration utility is split up into two sections. The first section will contain any unexpected errors or warnings that arise during the migration process. Any information in this section will also be displayed through the utility, so if no errors are reported during the migration itself, you should not need to check the log file.

Any information in the log file located beneath the line “YOU CAN SAFELY IGNORE EVERYTHING BELOW THIS POINT. IT IS INFORMATIONAL AND

DOES NOT REPRESENT ANY MIGRATION ERRORS” can, as indicated, be safely ignored. This information is collected so it will be available for use by Technical Support, if that becomes necessary. More detailed information for anything listed at this point in the log file can also be found in the Migration Guide.



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