

AccuRoute[®] Server and Clients Upgrade Guide



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The Upland Success Community

The Upland Community is the central hub for Upland customer information, in the community you can:

- Track tickets
- Search and Download Knowledge
- Interact in Upland Forums
- Stay up to date on AccuRoute and/or Upland News

Access the Upland Success Community by logging in with your company email at:

<https://community.uplandsoftware.com/hc/en-us>

Customer Service and Technical Support Contact Information

- Phone: 718-362-3755 or 1-888-303-8098
- E-mail: omtool-support@uplandsoftware.com

NOTE: Technical support requires an active support contract. For more information go to:

<https://uplandsoftware.com/accuroute/customer-success/support-overview/>

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Section 1: Introduction

This Upgrade Guide contains instructions on upgrading your legacy AccuRoute environment to AccuRoute Server v6.3. It is written for the Upland AccuRoute Server administrators with detailed knowledge of AccuRoute, the Windows operating system and the LAN.

[About AccuRoute](#) (1-1)

[Supported upgrade environment](#) (1-1)

[About the upgrade](#) (1-1)

[Related AccuRoute documentation](#) (1-6)

About AccuRoute

AccuRoute is Upland's award-winning document-handling platform that captures, converts, routes and archives both paper and electronic-based documents enabling fast, secure, simultaneous distribution of data to multiple destinations in multiple formats. Using AccuRoute, an organization can deliver information faster with more efficient work flows while reducing the cost, complexity and risk.

About the upgrade

The steps involved in upgrading a legacy AccuRoute Server to AccuRoute v6.3 are as follows:

- Preparing the legacy AccuRoute Server for the upgrade.
- Upgrading the following interfaces: AccuRoute Server, Remote Administrators, Remote AccuRoute Compose Components (Composers), Remote AccuRoute Connectors for DMS Libraries, Remote Embedded Directive Managers, Remote Modem Servers and clients.
- Configuring the AccuRoute Server if necessary.

Supported upgrade environment

The following sections list the supported operating systems, server, client, database and modem versions. Use the information as a checklist and ensure you have the supported versions before you start the upgrade.

Server Operating Systems

- Windows 2016 SP, 2019 64-bit
- Windows 2012 R2 64-bit

Databases

- Microsoft® SQL Server 2012, 2014, 2016
- Microsoft SQL Express 2012, 2014, 2016

Modem boards

- Dialogic® Brooktrout® TR1034, SR140, or TruFax RoHS series with Boston v6.11.1+ drivers

Note Dialogic Brooktrout board models that are older than those listed above are not supported.

Upland AccuRoute Server

- AccuRoute Server v5.0 through 6.2

Client Operating Systems

- Microsoft Windows 10
- Microsoft Windows 8.1

AccuRoute Desktop

- AccuRoute v6.2

Upgrade notes

Remote Administrators, Composers, AccuRoute Connectors for DMS Libraries, Embedded Directive Managers and Modem Servers

All systems in your environment must use the same version of AccuRoute. Therefore, when you decide to upgrade your legacy AccuRoute Server to AccuRoute v6.3, you must upgrade all systems that comprise your environment. This includes Remote Administrators, Remote Composers, Remote AccuRoute Connectors for DMS Libraries, Remote Embedded Directive Managers and Remote Modem Servers.

Important Once you upgrade the AccuRoute Server, all Remote Composers go off-line until you upgrade them.

ObjectArchive™ database

If you are planning to set up and use ObjectArchive, verify that the system where you will install ObjectArchive meets the following hardware and software requirements.

- Windows NT domain computer that always runs in the same domain as the AccuRoute Server
- Dual core processor; 2 GHz; 4GB of RAM; RAID 5W with 100 GB of disk space; DVD-ROM drive; and Microsoft mouse or compatible pointing device
- Windows 2012 64-bit, Windows 2008 R2 64 bit
- Microsoft SQL Server 2012 or MS SQL Server 2008

Note ObjectArchive must be installed on a system remote from AccuRoute Server. The SQL Server does not have to be the same one used for the AccuRoute Server databases.

Remote AccuRoute Intelligent Device Client

When you upgrade your AccuRoute Server, you must upgrade all instances of the remote AccuRoute Intelligent Device Client in your environment. For instructions on installing, configuring and removing the remote client, consult the [AccuRoute Server Installation Guide](#).

Composers

When you install AccuRoute Server v6.3 as a new install, it creates one General Composer and one OCR Composer. This allows for the OCR Composer to be off-loaded more easily, freeing up valuable system resources.

However, when you upgrade from a legacy server to AccuRoute Server v6.3, you may have only one instance of the Composer since the upgrade will not change your Composer configuration. You can add additional Composers, and configure a Composer to handle only OCR jobs. Contact [Upland AccuRoute Service and Support](#) for more information.

Universal Output (previously XML Output) connector

Some prior versions of the Universal Output connector (the XML Output connector) are neither supported nor updated by this release. If you were previously using the XML Output connector, then after installing the upgrade to AccuRoute v6.3 you will need to manually enable the Universal Output connector and update any existing rules.

AccuRoute clients

The installation setup files for the AccuRoute clients are located in the Clients directory of the AccuRoute Server. After you have finished installing the AccuRoute Server, you must configure the Clients folder within the Upland AccuRoute directory. This is necessary because systems which will install the AccuRoute Desktop and other clients remotely must have access to this folder containing the setup files. For instructions on how to configure the share, see [Configuring the client install directory share](#) (3-10).

Note AccuRoute Desktop Clients are supported by the AccuRoute Server for one release back. Therefore, if you have AccuRoute Desktop Clients from the prior release deployed in your environment, upgrading them is not a requirement. However, Upland AccuRoute recommends that you upgrade to the latest version of AccuRoute Desktop client to take advantage of the latest features.

Server clusters

AccuRoute is a cluster-aware application. If you plan to use the server cluster functionality after the upgrade, consult *Appendix A: Setting up an AccuRoute Server Cluster* section in the [AccuRoute Server Installation Guide](#) for an overview of the clustering functionality and instructions on setting up the cluster.

RuleSets

For Administrators planning an upgrade

Significant enhancements were made to RuleSets in the Server upgrade v5.1. The following RuleSets issues have been reported after an upgrade.

- Empty rulesets, rules no longer exist
- Disabled rulesets are enabled
- Deleted rulesets reappear
- Rules moved to different rulesets
- Action items missing from rules

During the upgrade there is a conflict between the previous and current RuleSets tables and migrations that result in the issues listed above.

Note Backup your server and database before upgrading.

Truncate Table RoutingRules Resolution

See the table below before using the Truncate Table Routing Rules resolution.

Table 1-1: Upgrade Scenario/Truncate

Upgrade Scenario	Truncate
Server upgrade less than or equal to v5.0	Do not truncate.
Server upgrade from v5.1. to v5.1.1 or 6.x	Truncating is required.
Server upgrade from v5.1.1. to v6.x	Truncating is required.
Server upgrade from v6.x to v6.x; for example, v6.0 to v6.2	Truncating is required.

AccuRoute recommends that you complete the following procedure **before** you upgrade.

- 1 Open **Microsoft SQL Server Management Studio** and connect to the SQL server hosting the AccuRoute Database.
- 2 Click **New Query** on the toolbar.
- 3 On the toolbar, change the database name on the drop-down list from Master to the AccuRoute Server's Core Database.
- 4 Type the following query into the query window: **Truncate Table RoutingRules.**
- 5 Click **Execute** on the toolbar. Command(s) completed successfully message appears.

Note Read this upgrade manual in its entirety and plan your upgrade accordingly. If you have additional questions or require assistance in upgrading, contact Upland AccuRoute Technical Support.

Running the Server with Limited Administrator Rights

Companies have to manage Administrator rights to their technology resources effectively. Giving everyone in an organization Administrator rights is risky and can potentially result in a huge IT security breach and other technical issues. Operating system and other software applications have mechanisms in place that allow organizations to determine who can execute full or limited Administrator rights.

The AccuRoute server platform and its services support limited Administrator rights. You can set up limited Administrator rights for user accounts that need to perform specific server-related services. User accounts with limited Administrator rights cannot install or upgrade the server.

See AccuRoute Administrator Help > Running the Server with Administrator Rights for more information.

Related AccuRoute documentation

For more information about AccuRoute Desktop and other AccuRoute products, refer to the [AccuRoute documentation home page](#) to access:

- Release notes
- DMS Libraries quick start guides
- User guides and online help
- Administrator guides
- Installation and upgrade guides

Section 2: Preparing for the Upgrade

This section includes:

[Verifying the version of your AccuRoute Server](#) (2-1)

[Preparing the AccuRoute Server](#) (2-1)

Verifying the version of your AccuRoute Server

You can upgrade to AccuRoute Server v6.3 from the following AccuRoute versions.

- AccuRoute Server v5.0 through v6.2

Note If you are running AccuRoute v4.x, first [upgrade to v5.0](#) and then follow the instructions in this guide to upgrade to v6.3.

To check the version of your server:

- 1 Start the Upland **Server Administrator**.
- 2 In the console tree, right-click the **AccuRoute Server** name.
- 3 Select **Properties** from the drop-down menu.

The version is listed in the **General** tab of the **Properties** page.

- 4 Verify that the version of the server is as listed above.

Preparing the AccuRoute Server

This section includes:

[Verifying a Windows Active Directory environment](#) (2-2)

[Backing up the database](#) (2-2)

[Backing up the server](#) (2-3)

[Disabling the cleanup task](#) (2-3)

[Backing up edited templates](#) (2-3)

[Reviewing custom views](#) (2-4)

[Obtaining login credentials of the system running the AccuRoute Server](#) (2-4)

[Canceling messages in the In Process Queue](#) (2-4)

[Verifying fax board drivers \(for servers with fax capability\)](#) (2-5)

[Reviewing configuration data for the AccuRoute Connector for LexisNexis® Concordance®](#) (2-5)

[Embedded AccuRoute Device Clients](#) (2-5)

[Backing up Cost Recovery custom configurations](#) (2-5)

[Running the Prerequisite Installation Checker](#) (2-6)

You must prepare the AccuRoute Server and the systems in the environment before you upgrade.

Verifying a Windows Active Directory environment

Before you proceed further, verify that the system where the AccuRoute Server is running has an active Windows Active Directory. This is of critical importance since AccuRoute v6.3 can only be installed in a Windows Active Directory environment. All server security and authentications are dependent on the Active Directory authentication.

Backing up the database

Important Before you upgrade, you must back up all the existing AccuRoute databases using the instructions below.

- 1 Log in to the system which has a given AccuRoute Server database.
- 2 Click **Start > All Programs > Administrative Tools > Services**.
- 3 Locate all Upland AccuRoute services.
- 4 Right-click each service and click **Properties** from the drop-down menu.
- 5 On the **Properties** page, go to the **Startup type** section and select **Disabled** from the drop-down menu.
- 6 Stop all Upland AccuRoute services.
- 7 Using the Task Manager, verify that all Upland AccuRoute processes are stopped.
- 8 Click **Start > Run** to open a Windows command prompt.
- 9 Back up the database using instructions provided by Microsoft in [http://msdn.microsoft.com/en-us/library/ms130214\(SQL.90\).aspx](http://msdn.microsoft.com/en-us/library/ms130214(SQL.90).aspx).

If necessary, change the name of the database while backing it up. You can also change the name of the backup file and the file path.

- 10 Locate the Upland AccuRoute services and set the Startup Type to **Automatic**.
- 11 Start all Upland AccuRoute services.

Backing up the server

Before you upgrade, you must back up the server in addition to backing up your database.

Backing up the primary and/or secondary server

- 1 Stop all services on both cluster nodes if you are working in a cluster or in a stand-alone server. Service names are listed after the instructions.
- 2 Verify that the services have been stopped successfully prior to continuing. Both nodes need to be shut down in order to backup any offloaded objects.
- 3 Back up any objects offloaded via the registry under Logicals and DSN.
 - ▶ HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Omtool\Genifax\Current Version\Logicals
 - ▶ HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Omtool\Genifax\Current Version\DSN

Note Prior to AccuRoute 2.3, Operating Systems used were 32 bit operating systems, i.e. Windows 2003. The above registry objects were under HKEY_LOCAL_MACHINE\Software\Omtool.

Examples:

- ▶ \Messages directory
 - ▶ \SQL Databases for AccuRoute Workflow/Configuration
 - ▶ \Config location
- 4 Backup connector destinations. You can review connector destinations in the properties of each connector located in the Server Administrator.

Examples:

- ▶ Directories for inbound either via Filescan or database connectors
 - ▶ Database names and locations for database connectors
- 5 Backup the Shared Modem Directory. You can find the shared modem directory in the Server Administrator.
 - ▶ Go into the Telco Connector properties.
 - ▶ Click Advanced on the General tab.

Note You will need to disable the Notification Manager Service so messages will be received by the Modem Manager and placed in the RECV directory until the Connector Manager is started and the Telco connector is enabled. When the Modem Manager is shut down, inbound calls will receive 'dead air'. If you would like to receive faxes during the backup you may leave the Modem Manager running if the backup software does not exclusively lock the modem directories.

- 6 Back up any Maintenance Database and Directories configured under Components | Maintenance | Archive tab in the Server Administrator.
- 7 Start the following server services.

- ▶ **Services Prior to AccuRoute 5.1.1:** Omtool Cluster Manager if running in a Cluster, Omtool Component Manager, Omtool Device Manager, Omtool Mobile Device Manager, Omtool Modem Manager, Omtool Notification Manager.
- ▶ **Services 5.1.1 and higher:** Upland Cluster Manager if running in a Cluster, Upland Component Manager, Upland Device Manager, Upland Mobile Device Manager, Upland Modem Manager, Upland Notification Manager.

For information on how to backup your server, you can also log in to the Upland Success Community using your Sign-in credentials and see this article:

<https://community.uplandsoftware.com/hc/en-us/articles/115005820746-How-to-back-up-the-Primary-and-or-Secondary-AccuRoute-Server>.

Disabling the cleanup task

Before you upgrade, you must disable the cleanup task so that it cannot run during the server upgrade.

- 1 Open the Server Administrator.
- 2 Click **Start > All Programs > Upland AccuRoute > AccuRoute Server Administrator** to open the Administrator.
- 3 Expand the console tree and click **Components**.
- 4 Double-click the **Maintenance** component to open the **Properties** page.
- 5 Click **Advanced** to open the **Maintenance Advanced Properties** page.
- 6 Click **Schedule**.
A popup opens prompting you to provide the username and its associated password.
- 7 Enter the user name and password that was provided during server installation.
- 8 Clear the **Enabled (scheduled task runs at specified time)** option.
- 9 Click **OK** and then **OK** again to save your changes.

Backing up edited templates

The AccuRoute installation includes cover page templates, routing sheet templates, and notification templates for your server. The setup program for the server upgrade overwrites all the template documents provided by default with AccuRoute.

If you have edited these template, those edits will be overwritten by the upgrade. In this situation, Upland recommends you save your edited versions to another location, and later update the new versions based on your backup copies. Update the new versions based on your backups (instead of overwriting them with your backup copies) in case any significant template changes were delivered, which may cause incompatibility.

Note The AccuRoute default templates are located in the `\UplandAccuRoute\AccuRoute\Languages` directory.

If you have added new template documents, those are unaffected by the upgrade.

Reviewing custom views

Important Before you upgrade, it is recommended that you review your custom views and note the criteria you used to create them. After the upgrade, you can use these notes to recreate your prior custom views setup.

To locate your custom views:

- 1 Click **Start > All Programs > Upland AccuRoute > AccuRoute Server Administrator** to open the Administrator.
- 2 In the console tree, expand the **Server Administrator** node and select **Messages**.

Both **In Process** and **History** are standard system views. Any other options you see under **Messages** are **Custom Views**.

Obtaining login credentials of the system running the AccuRoute Server

During the server upgrade, the setup program prompts you for login credentials of the server account. (This is the same account you used to install the AccuRoute Server.) Before you upgrade, make a note of the login credentials of the system running the server.

Canceling messages in the In Process Queue

When preparing for the upgrade, you must wait for all messages to complete or cancel all messages in the **In Process** queue.

Note Any messages located in the In Process queue at the time of the upgrade fail to compose, as indicated by the message journal.

You must also notify AccuRoute users that they cannot send documents and faxes until the server upgrade and configuration is complete. It is recommended that you upgrade the server during off hours or when the volume of documents and faxes is low.

To cancel messages in the In Process queue:

- 1 Click **Start > All Programs > Upland AccuRoute > AccuRoute Server Administrator** to open the Administrator.
- 2 Expand the console tree and go to **Messages > In Process**.
- 3 In the **Details** pane, select **All Items** in the **View** menu.
- 4 Select all the items in the list. Right-click and select **Cancel** from the drop-down options.
You are prompted to confirm or cancel the operation.
- 5 Click **Yes**.

Verifying fax board drivers (for servers with fax capability)

The upgrade supports all new fax board drivers/modules for all supported fax boards including Dialogic Brooktrout Technology SR140, TR1034 series, and TruFax RoHS series. It is recommended that you update the drivers for your fax boards during an upgrade.

The supported fax board drivers are:

- Dialogic Brooktrout TR1034 or SR140 with Boston v6.x drivers
- Dialogic Brooktrout Trufax RoHS only with Boston v6.x drivers

Important Non-RoHS TruFax boards are not supported in AccuRoute v6.3.

Reviewing configuration data for the AccuRoute Connector for LexisNexis® Concordance®

If you are using a AccuRoute Connector for LexisNexis Concordance, review and note the configuration details. You will need this data to reconfigure the connector after the server upgrade.

Note If you are using AccuRoute Connector for CT Summation or AccuRoute Connector for FTI® Ringtail™, no review or reconfiguration is needed after the upgrade.

Note about Litigation Support Interface for CT Summation

There is no automatic upgrade of the old AccuRoute Connector for Summation. After the upgrade, you must manually remove the old connector and create a new connector with the old configuration details.

Embedded AccuRoute Device Clients

All of the Embedded AccuRoute device clients must be uninstalled and reinstalled after the upgrade. Refer to the [AccuRoute documentation home page](#) for detailed device client installation instructions for the following clients:

- AccuRoute Embedded Device Client v6.3
- Ricoh ESA v6.3
- Xerox EIP v6.3

Backing up Cost Recovery custom configurations

If you are upgrading your server and have Cost Recovery installed, you will need to uninstall and reinstall the Cost Recovery client. However, when you uninstall Cost Recovery, you lose all previous custom configurations. To keep these configurations and use them in the new Cost Recovery client, backup the following files:

- [CostRecovery.txt](#)

- [LFAccounting.ini](#)
- [LFCostRecovery.ini](#)
- [LFCostRecoveryU.ini](#)

Additionally, if you want to keep previous data and if the file is not set to overwrite the previous record you should keep the [cr.txt](#) file.

Running the Prerequisite Installation Checker

The upgrade installation and configuration process now automates a series of previously-manual tasks.

The pre-installation pack includes options for configuring a standard AccuRoute server, Web Client, Remote Components, and Remote Modem servers. This pre-installation package automatically verifies, installs, and/or configures a variety of prerequisites, including:

- Minimum versions of the OS, Internet Explorer, NET, and Microsoft SQL
- SMTP and IIS services
- 32-bit IIS applications
- DCOM and IIS configuration
- Installation of required runtime libraries
- Internet Enhanced Security (IE ESC) is disabled
- 8.3 Naming Convention is disabled
- IIS large scanning setting is enabled
- Application of Windows firewall settings
- Print spooler and IIS services set to automatic
- User Access Control (UAC) set to required setting

Post-installation configuration requirements are automated as well. Post-installation configurations for the server include:

- Setting the Doc, Docx, XLS, XLSX, PPT, PPTX, HTM and HTML formats to use the Aspose compose engine
- Setting a Cleanup task in Maintenance for 30 days

Note It is recommended to run this program on all servers that will run AccuRoute or remote AccuRoute components.

Section 3: Applying the Upgrade

This section includes:

[Downloading the server upgrade kit](#) (3-1)

[Upgrading the AccuRoute Server](#) (3-1)

[Upgrading Remote Administrators, Composers, AccuRoute Connectors for DMS Libraries, Embedded Directive Managers and Modem Servers](#) (3-8)

[Configuring the client install directory share](#) (3-10)

For information on how to upgrade AccuRoute Servers that are part of a cluster, see [Upgrading AccuRoute Servers in a Cluster](#) (A-1).

Downloading the server upgrade kit

- 1 Contact [Customer Service](#) to acquire a download password.
- 2 Go to <https://uplandsoftware.com/accuroute/customer-success/support-login/>.
- 3 Log in using your download password.
- 4 Locate the module in the **Downloads & Docs** section.
- 5 Download the module and save it to a local drive.
- 6 Extract the files to a location on your AccuRoute Server.

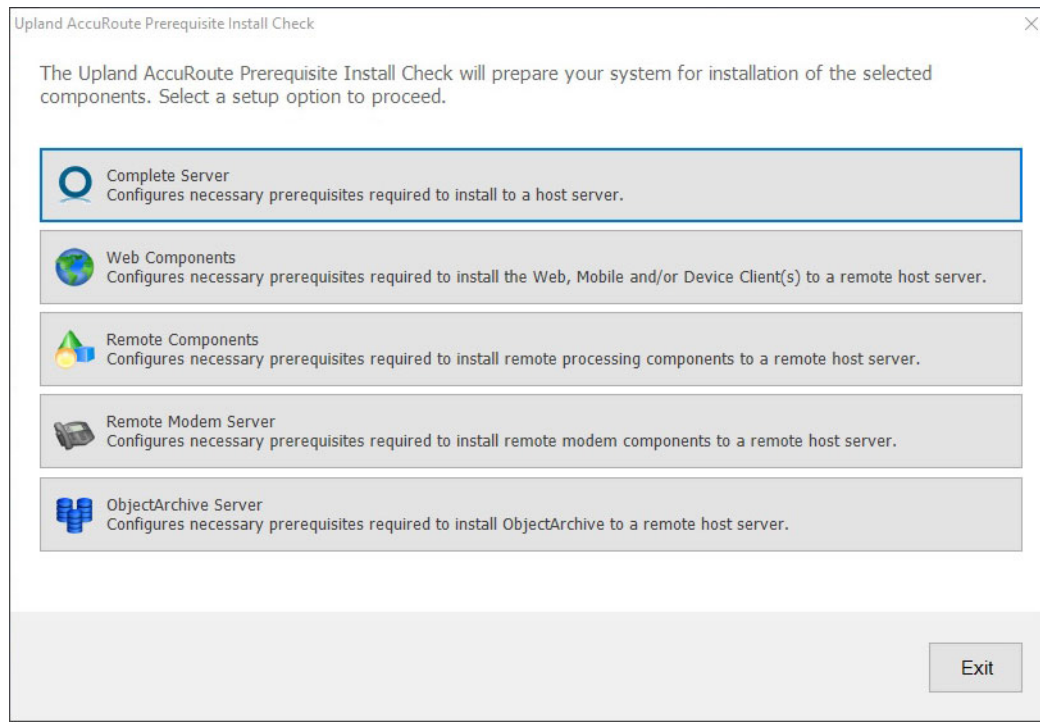
Upgrading the AccuRoute Server

- 1 Close all applications on the server.

Note If you are upgrading an AccuRoute Server Cluster, you must manually stop the Cluster Services prior to the upgrade, and then manually restart them after the upgrade completes.

- 2 Log in to the system where the AccuRoute Server is being upgraded using the AccuRoute service account.
- 3 Navigate to the directory where you saved the download and run [install.exe](#).

- 4 The upgrade installation program reviews your system, detects a prior version of the server, and the **AccuRoute Prerequisite Install Check** screen appears.



Select the option for which you want your system automatically prepared. For a typical server upgrade, select **Complete Server**.

Each option checks for and (if not already present) installs and/or configures the necessary prerequisites for your selection.

Complete Server – prepares the system to install the AccuRoute Server onto one host server, including:

- ▲ Microsoft.NET Framework 4.6.1
- ▲ Microsoft.NET Framework 3.5 SP1
- ▲ Microsoft SQL Server 2012 Express
- ▲ Web Server IIS installation
- ▲ Sets the W3SVC Service (from the Web Server) to Automatic Startup
- ▲ SMTP Service installation
- ▲ Sets the SMTP Service to Automatic Startup
- ▲ Adds a DCOM Exception in the Windows Firewall
- ▲ Sets the Print Spooler Service to Automatic Startup

Web Components – prepares the system to install the Web, Mobile and/or Device Client(s) to a remote host server, including:

- ▲ Microsoft.NET Framework 4.6.1
- ▲ Microsoft.NET Framework 3.5 SP1

- ▲ Web Server IIS installation
- ▲ Sets the W3SVC Service (from the Web Server) to Automatic Startup
- ▲ Adds a DCOM Exception in the Windows Firewall

Remote Components – prepares the system to install remote processing components onto a remote host server, including:

- ▲ Microsoft.NET Framework 4.6.1
- ▲ SMTP Service installation
- ▲ Sets the SMTP Service to Automatic Startup
- ▲ Adds a DCOM Exception in the Windows Firewall
- ▲ Sets the Print Spooler Service to Automatic Startup

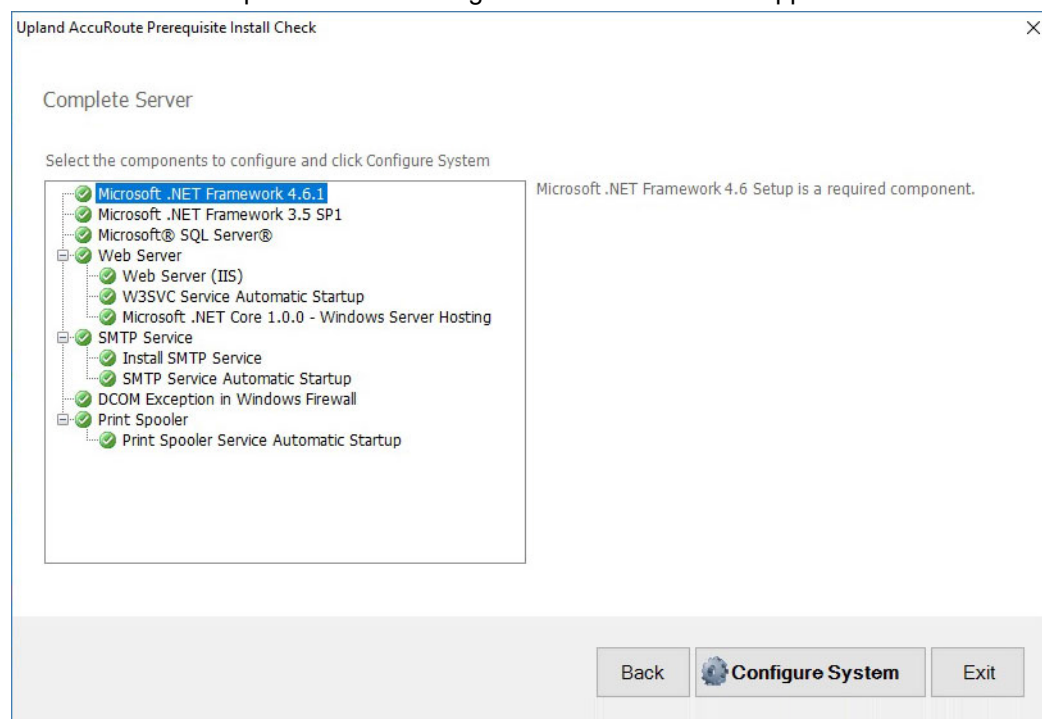
Remote Modem Server – prepares the system to install remote modem components to a remote host server, including:

- ▲ Microsoft.NET Framework 4.6.1
- ▲ Adds a DCOM Exception in the Windows Firewall

ObjectArchive Server – prepares the system to install ObjectArchive to a remote host server, including:

- ▲ Microsoft.NET Framework 4.6.1
- ▲ Microsoft SQL Server 2012 Express
- ▲ Adds a DCOM Exception in the Windows Firewall

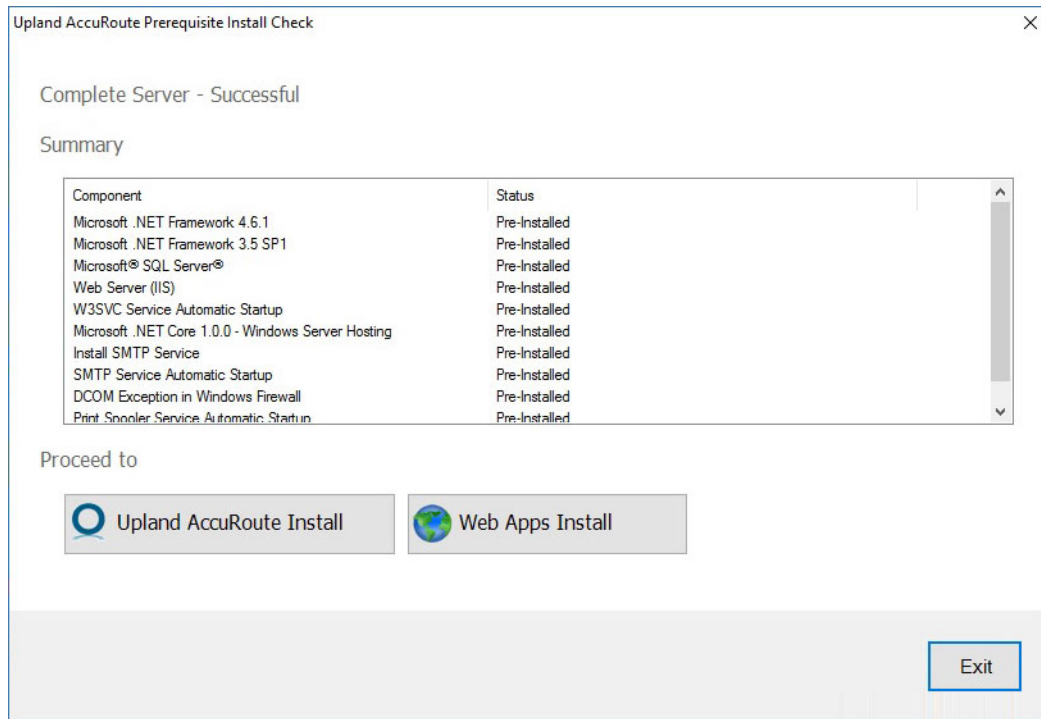
- 5 A default list of components to be configured before installation appears in the next screen.



Click **Configure System**.

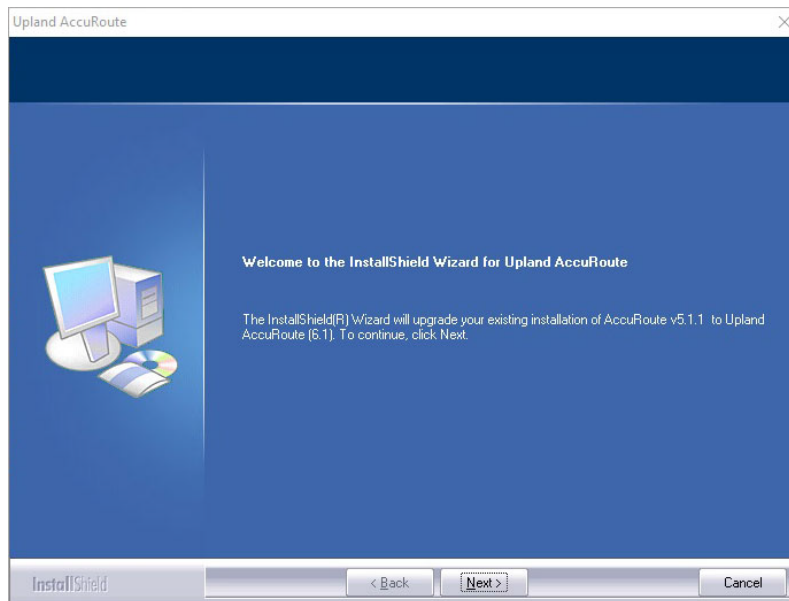
Note A **File In Use** Windows dialog may appear in the background. Find the dialog and click **OK** to proceed with the configuration.

- 6 When the system finishes configuring your prerequisites, a **Successful Summary** screen appears, listing components and their status.



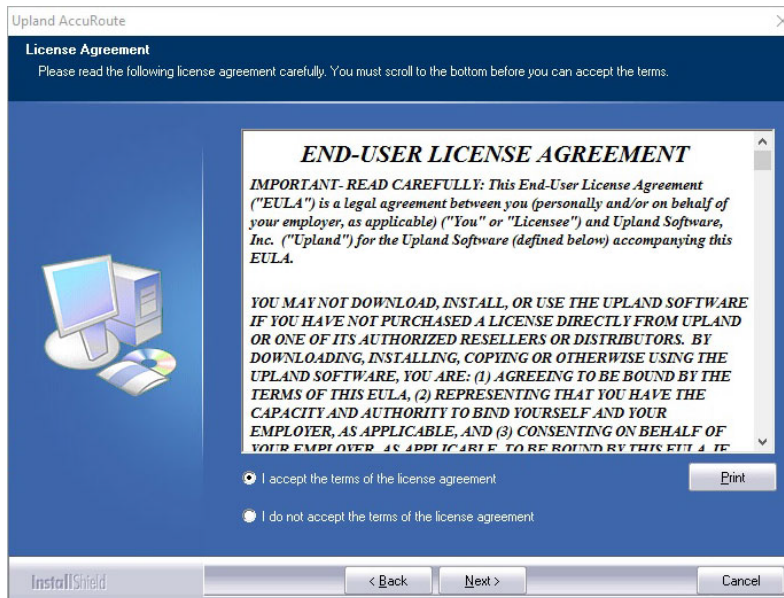
Click the upgrade installation type with which you want to proceed (**AccuRoute Server** or **Web Apps Install**).

- 7 The system prepares for the upgrade process and the **InstallShield Wizard for AccuRoute Welcome** screen appears. Click **Next**.



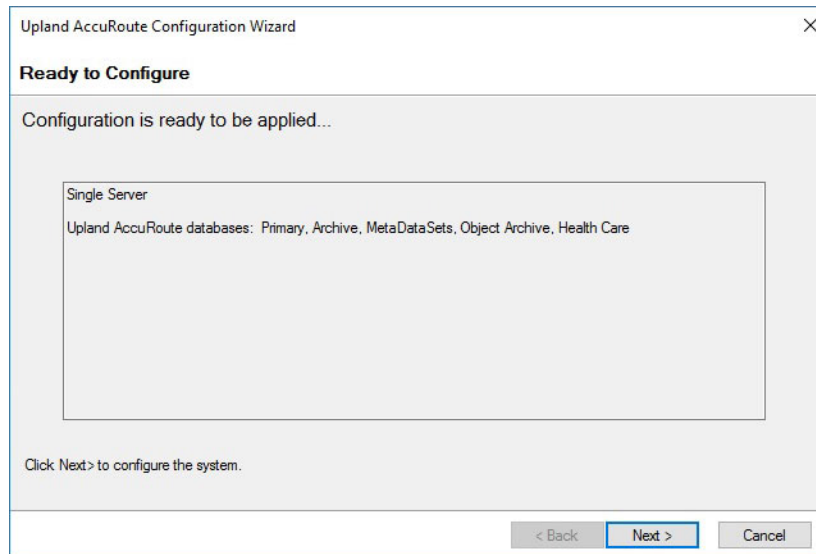
Note During the installation, if a dialog box indicates that a running application needs to be closed before you proceed, close the running applications. Click **Retry** and proceed with the installation.

- 8 The Command Prompt window may appear temporarily as the setup program stops the Upland Address Book Manager service. The **License Agreement** screen appears.



Read the license agreement and click the button beside the **I accept the terms of the license agreement** option. Click **Next**.

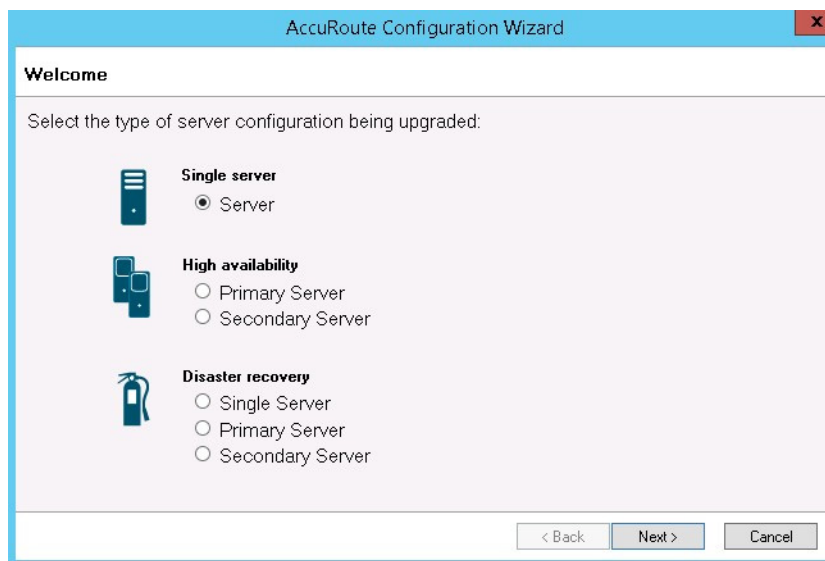
- 9 The **Ready to Configure** screen opens, including a list of your AccuRoute databases. Click **Next** to begin the server upgrade.



The **InstallShield Configuration Wizard** upgrades the server and the upgrade process continues with the database upgrade.

Note The upgrade configuration may look to upgrade the **ACTIVITYDB**, even if it is not present. Select the **ArchiveDB** for the upgrade to continue. The Activity tables will be created in the **ArchiveDB** which is supported.

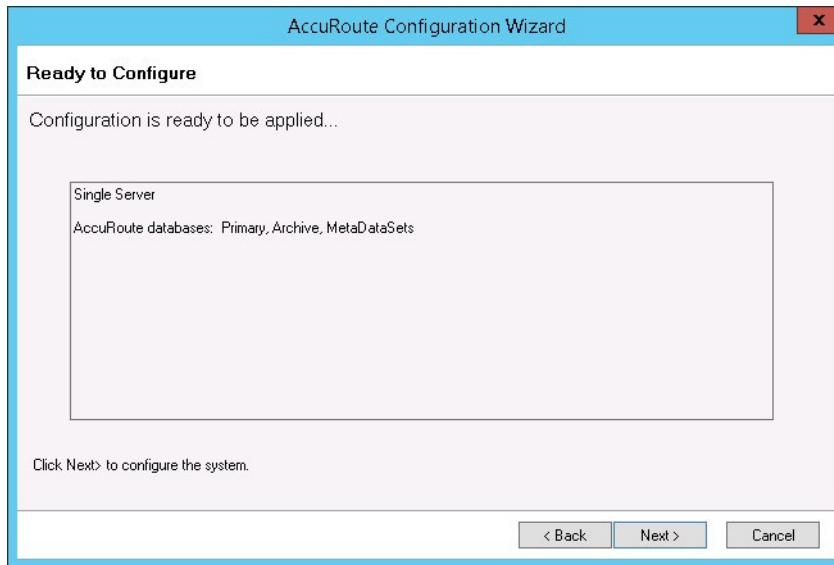
- 10 The database **AccuRoute Configuration Wizard Welcome** screen appears.



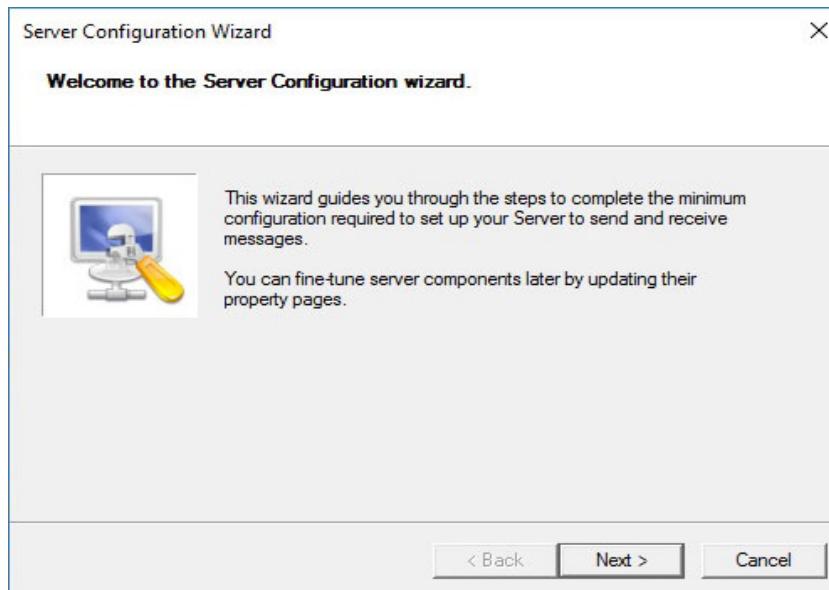
For a typical server upgrade, select **Server** in the **Single Server** section and click **Next**.

Note For more information about upgrading a Cluster configuration, refer to [Section A: Upgrading AccuRoute Servers in a Cluster \(A-1\)](#).

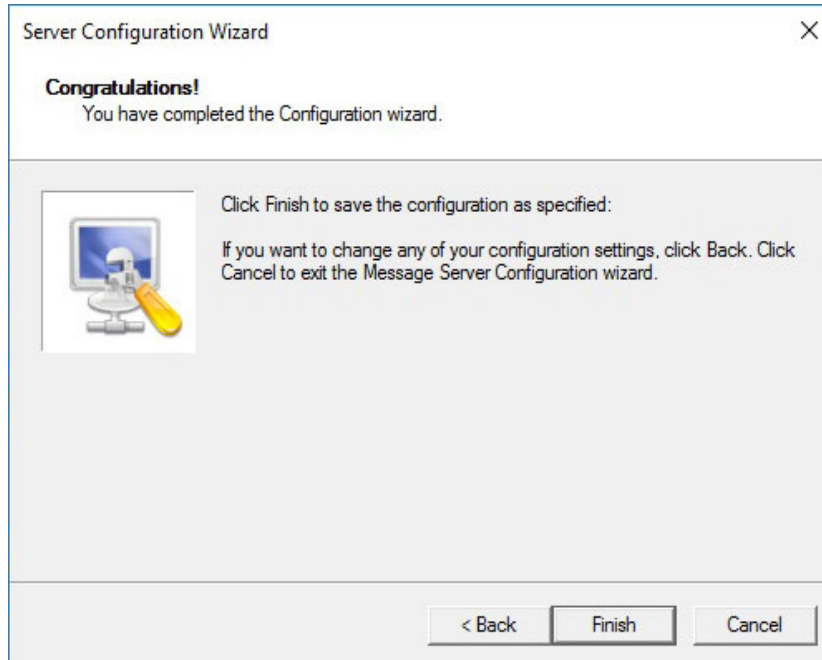
11 The **Ready to Configure** screen appears. Click **Next**.



12 The **Server Configuration Wizard** launches and the **Welcome** page appears.



Click **Next**. Your server configuration is upgraded.

13 The **Server Configuration Wizard Congratulations!** screen appears.**14** Click **Finish**.

The **Server Configuration Wizard** saves your changes and the **AccuRoute Server Administrator** automatically starts.

Note If you are upgrading an AccuRoute Server Cluster, you must manually restart Cluster Services after the upgrade completes.

15 Check the version of the server. The version should be v6.3.

Upgrading Remote Administrators, Composers, AccuRoute Connectors for DMS Libraries, Embedded Directive Managers and Modem Servers

Before you upgrade your Remote Administrator, Composer, AccuRoute Connector for DMS Libraries, Embedded Directive Manager, or Modem Server, run the Prerequisite Installation Check client to verify that all required settings are applied.

To upgrade Remote Administrators, Components, Connectors or Modem Servers:

- 1 Log in to the system where you are performing the upgrade.
- 2 Open Windows Explorer and navigate to the folder where you saved the upgrade download.

Note The folder where you saved the download must be shared so that the setup files are accessible from remote systems.

- 3 Run **install.exe**. The **Welcome** message appears in the InstallShield wizard.
- 4 Click **Next**. The **License Agreement** page opens.
- 5 Read the license agreement and click the button beside the **I accept the terms of the license agreement** option. Click **Next**. The **AccuRoute Server User** page opens.
- 6 Enter the following information:
 - ▶ In the **NT Domain** text box, enter the domain name.
 - ▶ In the **User Name** text box, enter the user name.
 - ▶ In the **Password** and **Confirm Password** text boxes, enter the password.

Note The login credentials you specify here must be same as those used on the AccuRoute Server from where the components are called.

- 7 Click **Next**. The **Installation Settings** page opens.
- 8 Review the installation settings. Click **Next** to begin remote component upgrade.
The InstallShield Wizard upgrades the remote component. When the upgrade is complete, the **InstallShield Wizard Complete** screen appears.
- 9 Click **Finish**.
- 10 Restart your computer.

Important If you upgraded a Remote Administrator, proceed to [Connecting a Remote Administrator to the server](#).

Connecting a Remote Administrator to the server

The Administrator supports any combination of AccuRoute Servers.

To launch the Administrator and connect to a server:

- 1 Click **Start > All Programs > Upland AccuRoute > AccuRoute Server Administrator**. The **Specify Upland Message Server** page opens.
- 2 Enter the name or IP address of the AccuRoute Server in the **Network Address** text box.
- 3 Click **Finish**. The **AccuRoute Server Administrator** starts.

Important If you have more than one server in your environment, type the name of any server in the **Network Address** text box—you can connect to additional servers once the Administrator starts.

If you want to connect to another server:

- 1 Right-click the **AccuRoute Server Administrator** in the console tree. Select **Connect**. The **Specify Upland Message Server** page opens.
- 2 Enter the name or IP address of the AccuRoute Server in the **Network Address** text box.
- 3 Click **Finish**.

The server appears in the console tree under **AccuRoute Server Administrator**.

Configuring the client install directory share

After you finish upgrading the AccuRoute Server, you must configure the **Clients** folder within the **Upland AccuRoute** directory located in the **Program Files** folder. This is necessary because the systems on which you will remotely install the AccuRoute Desktop and other clients must have access to this folder containing the setup files.

Note If you had a shared folder prior to the upgrade, share permissions for everyone except for the user account used are lost during the upgrade. To configure share permissions for everyone and not just the user account used during the upgrade, complete the procedure below.

To configure sharing:

- 1 Navigate to the [\Upland AccuRoute\AccuRoute\Clients](#) directory on the drive where you previously installed the AccuRoute Server.
- 2 Right-click **Clients** and select **Sharing and Security** from the drop-down menu.
- 3 Select the **Share this folder** option.
- 4 Select **Permissions** and verify that user **Everyone** is listed with read access.
- 5 Click **OK** then **Apply** to save your changes.

Section 4: Required Tasks after Upgrading

Upgrading

This section includes:

- [Copying templates to the server](#) (4-1)
- [Resending canceled messages](#) (4-1)
- [Providing a logon account for the cleanup task](#) (4-2)
- [Other configurations](#) (4-2)

Copying templates to the server

Before running the server upgrade, you made a backup copy of the [Templates](#) and [EmbeddedDirectives](#) directories. See [Backing up edited templates](#) (2-3) for more information.

Now copy these directories to the following locations on the AccuRoute Server:

- Copy Notifications (body and subjects) to:
[\UplandAccuRoute\AccuRoute\Languages\ENU\Notifications](#)
- Copy CoverPages to:
[\AccuRoute\Languages\ENU\Coverpages](#)
- Copy Distribution Routing Sheet templates to:
[\AccuRoute\Languages\ENU\EmbeddedDirectives](#)

Resending canceled messages

Before running the server upgrade, you cancelled all messages in the **In Process** folder. For more information, see [Canceling messages in the In Process Queue](#) (2-4).

Resend the messages you cancelled using the procedure below.

- 1 Start the AccuRoute Server Administrator.
- 2 Expand **Messages** in the console tree. Click **History**.
- 3 Click the radio button below the **Cancelled** barometer.
- 4 Go to the details pane and select **All Items in the View** menu.
- 5 Select all items in the list, right-click and select **Resend**.

- 6 Click **OK** to resend these messages.

Providing a logon account for the cleanup task

Before running the server upgrade, you disabled the cleanup task so that it could not run during the server upgrade. For more information, see [Disabling the cleanup task](#) (2-3).

Re-enable the cleanup function by providing the login credentials for the task. Because the cleanup task modifies the AccuRoute database, it requires the same login credentials as the server account.

- 1 Start the AccuRoute Server Administrator.
- 2 Click and expand **Components** in the console tree.
- 3 Double-click **Maintenance** in the details pane.
- 4 Click **Advanced**. The **Maintenance Advanced Properties** page opens.
- 5 Click **Schedule**. The **Enter Account Information** page opens.
- 6 In the **Username** text box, enter the user name. In the **Password** and **Confirm password** text boxes, enter the password.
- 7 Click **OK**, **OK** and **OK** to save your changes.

Other configurations

After upgrading to AccuRoute v6.3, you must configure the connectors and components in your environment as necessary. For example, if you are using a remote Modem Server, you must re-detect Telco channels after the upgrade. Depending on your environment and needs, you may need to perform all or none of the configurations listed below.

Important Be sure to review and note current configurations before proceeding with the upgrade process.

Enabling Notes after the upgrade

If you are using AccuRoute Connector for IBM® Lotus® Notes in your environment, all communication to and from the AccuRoute server is directed through the AccuRoute Connector for SMTP.

Modifying AccuRoute Server configuration after upgrade

After you upgrade your legacy AccuRoute Server, if you modify the server configuration, your actions will not remove the associated program files nor does it stop and remove associated services. For example, if you uninstall the Modem Server after an upgrade, it does not remove associated program files or stop/remove modem services. They will remain until a complete uninstallation is done.

Reconfiguring AccuRoute Connector for LexisNexis Concordance

If you are using AccuRoute Connector for LexisNexis Concordance in your environment, you must reconfigure the connector after upgrading and adding the permanent license for the Litigation Support connector. The AccuRoute Connector for LexisNexis Concordance contains a different configuration and implementation, requiring the connector to be reconfigured.

Note the configuration details before the upgrade and use that data to reconfigure the connector. See [Reviewing configuration data for the AccuRoute Connector for LexisNexis® Concordance® \(2-5\)](#) for details.

Reconfiguring conversion engine selection

Note Because modified conversion engine selections are lost during the upgrade, it is recommended that you review your current conversion engine selections and note the criteria you used to create them before upgrading to AccuRoute v6.3.

Modified conversion engine selections are not retained during the upgrade process. After upgrading from a legacy AccuRoute Server system to AccuRoute v6.3, reconfigure the conversion engines selected for particular file types.

For information on how to configure a conversion engine for file types, consult the [AccuRoute Server Administrator help](#).

Redetecting Telco channels

Note Because all channel configurations are lost during the upgrade, it is recommended that you review your current channel configurations and note the criteria you used to create them before upgrading to AccuRoute v6.3.

All channel configurations are lost during the upgrade process. After upgrading from a legacy AccuRoute Server system to AccuRoute v6.3, redetect the Telco channels in order to reconfigure them. For information on how to detect channels, consult the [AccuRoute Server Administrator help](#).

Section 5: Additional Configuration

This section includes:

[Updating Fax board drivers \(for servers with fax capability\)](#) (5-1)

[Downloading latest Dialogic Brooktrout drivers](#) (5-1)

[Installing Dialogic Brooktrout v6.7.5 x64 drivers](#) (5-2)

[Configuring Dialogic Brooktrout SR140](#) (5-3)

Updating Fax board drivers (for servers with fax capability)

The upgrade supports all new fax board drivers/modules for all supported fax boards including Dialogic Brooktrout Technology SR140, TR1034 series, and TruFax RoHS series.

Note It is recommended that you update the drivers for your fax boards. If an Upland Technical Support representative instructs you to update your drivers, use the procedures in this section to remove the drivers and then install new drivers.

Important Non-RoHS TruFax boards are not supported in AccuRoute v6.3.

Downloading latest Dialogic Brooktrout drivers

To download Dialogic Brooktrout v6.7.5 x64 drivers:

- 1 Go to <https://uplandsoftware.com/accuroute/customer-success/support-login/> and log in using your customer number.
- 2 In the navigation pane on the left, click **Support > Downloads and Docs**.
- 3 Open the **AccuRoute** menu, go to **Drivers** section. Locate the download.
- 4 Click the download link to begin the download.
The zip file containing the **.msi** file and the Release Notes opens.
- 5 Select the files and click **Extract**. Browse to the location where you want to save the file.
- 6 Click **Extract**. The files are extracted and saved to the location you specified.
- 7 Name this directory the **Boston** directory.

Installing Dialogic Brooktrout v6.7.5 x64 drivers

- 1 Locate the [Boston](#) directory.
- 2 Double-click [Brooktrout 6.7.5_x64.msi](#). The **Welcome** page opens.
- 3 Click **Next**. The **License Agreement** page opens.
- 4 Read the license agreement and select the **I accept the terms in the license agreement** option.
- 5 Click **Next**. The **Destination Folder** page opens.
- 6 Modify the destination location if necessary and click **Next**.
- 7 Click **Next** to begin the installation.
- 8 When installation is complete, you the **InstallShield Wizard Completed** page opens.
- 9 Click **Finish**. The Readme opens.

Activating the License

Note If you already have a working license, this step is not necessary.

Also note, the following procedure is applicable for SR140 modules only.

To activate the license:

- 1 Click **Start >Program Files > Brooktrout License Manager**.
The **BrookTrout License Manager** opens.
- 2 In the menu bar, click **License >Activate License**. The **License Activation** wizard opens and the **Welcome** message appears.
- 3 Click **Next**. Select **Using the interactive web method**.
- 4 Click **Next**. You get the **Node Lock** value.
- 5 Click **Save the instructions into a file** option.
- 6 Click **Next**.
- 7 Browse and save the file to a known location.
- 8 Go to the location where you saved the file. Open the file.

The file contains text similar to that shown below and provides the Node Lock value of your system:

```
To request a license, please visit our website:  
http://www.dialogic.com/activation  
and follow the instructions provided on the website.  
Dialogic will email the license to you immediately.
```

```
When prompted, supply the following information:  
Node Lock: [Node Lock value]
```


- 9 Open Internet Explorer and go to <http://www.dialogic.com/activation>.
- 10 In the **License Key** text box, enter the License key and the Node Lock value of your system.

Important For the license key, contact Dialogic customer support.

Dialogic sends you the license for your BrookTrout SR140 module.

Note This license key enables the Dialogic Brooktrout SR140 fax feature on the system from which the node value was retrieved. It cannot be transferred without assistance from Dialogic.

- 11 Save the license file to the local drive of the system.

Applying the license

Note The following procedure is applicable for SR140 modules only.

To apply the license:

- 1 Launch the **Brooktrout License Manager**.
- 2 Select **File > License**.
- 3 Select **Install License** from the drop-down menu.
- 4 Browse to the license file you saved on the system.

Configuring Dialogic Brooktrout SR140

For configuration instructions, see section 4 of the [Modem Driver Installation and Configuration Guide](#).

Section 6: Upgrading Client Applications

This section includes:

[AccuRoute Desktop Client requirements](#) (6-1)

[AccuRoute Web Client](#) (6-2)

[Cost Recovery Client](#) (6-2)

[FaxCenter Client](#) (6-3)

[AccuRoute Desktop Client](#) (6-4)

All client installation setup files are located in the [Clients](#) directory of the AccuRoute Server. Before rolling out the client upgrade, you can share this [Clients](#) directory so that it is easily accessible from remote systems where the clients are installed. For instructions on how to share the [Clients](#) directory containing the setup files, see [Configuring the client install directory share](#) (3-10).

AccuRoute Desktop Client requirements

The system where you install/upgrade the AccuRoute Desktop client must meet the following requirements:

- Pentium®-class processor
- Microsoft Windows 7, Microsoft Windows 8
- 20 MB hard disk space
- 64 MB RAM (128 recommended)
- Acrobat® Reader® 7.x (minimum)

Supported e-mail applications

- Microsoft® Outlook® 2007 and above (Outlook Express® not supported)
- Notes 6.5/6.0/5.0
- Novell GroupWise 6.0/5.5

When the client is configured to integrate with an address book for a supported e-mail application, the e-mail application must be selected as the Windows default e-mail application. For more information, consult Windows help.

AccuRoute Web Client

AccuRoute v6.3 introduces the new **Web Apps Client**, a highly-customizable replacement for the former Web Client. The prior Web Client has been renamed **Legacy Web Client**, and it remains the only place for authorized users to access the Administration section of the Web Client.

When you upgrade your AccuRoute Server, upgrade all instances of the AccuRoute Web Client in your environment. For more information, consult the [AccuRoute Web Client Installation Guide](#) and the [Web Client User Guide](#).

Note about AccuRoute Web Apps

Upland recommends that when you upgrade to AccuRoute Server v6.3, you install and configure the AccuRoute Web Apps Client v6.3.

Important If you have a prior version of the AccuRoute Web Client, do not uninstall or remove the deprecated AccuRoute Web Client application and set up files in your system, as deleting those files may interfere with the server usage.

Note You can configure the AccuRoute Server to use both the AccuRoute Legacy Web Views Client and the new AccuRoute Web Apps at the same time.

To upgrade the AccuRoute Web Client, refer to the [AccuRoute documentation home page](#) to access upgrade instructions.

Cost Recovery Client

When you upgrade your AccuRoute Server, upgrade all instances of the CostRecovery client in your environment. For more information on the CostRecovery application, consult the [CostRecovery Administrator Guide](#).

To upgrade CostRecovery:

- 1 Click **Start > Control Panel > Add/Remove Programs**. Remove the existing version of CostRecovery from the system.
- 2 Open Windows Explorer and navigate to `\\Servername\Clients\CostRecovery`, where **Clients** is the network share folder containing the installation setup files. You must have configured this folder to give everyone access to the folder.
- 3 Run `install.exe`.
The InstallShield Wizard configures the system for the CostRecovery client and the **Welcome** message appears.
- 4 Click **Next**. The **License Agreement** page opens.
- 5 Read the license agreement. Click **Yes**. The **Choose Destination Location** page opens.

- 6 Click **Next** to accept the default destination location. Alternately, to install the application in a different location, click **Browse**. Navigate to the desired directory. Click **OK** and then **Next**.

The **Genifax Server** page opens.

- 7 In the **Genifax Server** text box, enter the name or the IP address of the system running the AccuRoute Server.
- 8 Click **Next**. The **Start Copying Files** page opens.
- 9 Review the installation settings. Click **Next** to install the CostRecovery client.
- 10 When the installation is complete, the InstallShield Wizard **Complete** page opens.
- 11 Click **Finish**.

Important Recreate the export template file before running CostRecovery. Additionally, enable the **Billing** component on the AccuRoute Server and configure it to collect the information you need. For more information, refer to the Administrator help.

You can recreate older custom configurations in the new Cost Recovery client using the backup files. For more information, see [Backing up Cost Recovery custom configurations \(2-5\)](#).

- 12 Check the version of the client to make sure that the upgrade was successful. The version should be v6.3.

FaxCenter Client

When you upgrade your AccuRoute Server, upgrade all instances of the FaxCenter client in your environment. For more information on the FaxCenter application, consult the [FaxCenter Online Help](#).

To upgrade FaxCenter:

- 1 Click **Start > Control Panel > Add/Remove Programs**. Remove the existing version of FaxCenter from the system.
- 2 Open Windows Explorer and navigate to `\\Servername\Clients\FaxCenter`, where **Clients** is the network share folder containing the installation setup files. You must have configured this folder to give everyone access to the folder.
- 3 Run [install.exe](#).
The InstallShield Wizard configures the system for the FaxCenter client and the **Welcome** message appears.
- 4 Click **Next**. The **License Agreement** page opens.
- 5 Read the license agreement. Click **Yes**. The **Choose Destination Location** page opens.
- 6 Click **Next** to accept the default destination location. Alternately, to install the application in a different location, click **Browse**. Navigate to the desired directory. Click **OK** and then **Next**.

The **Start Copying Files** page opens.

- 7 Review the installation settings. Click **Next** to install the FaxCenter client.
- 8 When installation is complete, the InstallShield Wizard **Complete** page opens.
- 9 Click **Finish**.
- 10 Check the version of the client to make sure that the upgrade was successful. The version should be v6.3.

AccuRoute Desktop Client

The following version of the AccuRoute Desktop is qualified with AccuRoute v6.3.

- AccuRoute Desktop v5.0 through 6.2

Note While the legacy AccuRoute Desktops are supported, Upland recommends that you upgrade to the latest version of AccuRoute Desktop client to take advantage of the latest features. AccuRoute Desktop clients prior to v5.0 are not supported.

For more information on the AccuRoute Desktop client, consult the [Install Guide](#) and the [User Guide](#).

To upgrade the AccuRoute Desktop client:

- 1 Log in to the system where you have the client using an account that belongs to the local Administrators group.
- 2 Open Windows Explorer and navigate to `\\Servername\Clients\AccuRouteDesktop`, where `Clients` is the network share folder containing the installation setup files. You must have configured this folder to give everyone access to the folder.
- 3 Run `install.exe`.
The InstallShield Wizard configures the system and the **Welcome** message appears.
- 4 Click **Next**. The **License Agreement** page opens.
- 5 Read the license agreement. Select the **I accept the terms in the license agreement** option and click **Next**.
The **Destination Folder** page opens.
- 6 Click **Next** to accept the default destination location. Alternately, to install the application in a different location, click **Browse**. Navigate to the desired directory. Click **OK** and then **Next**.
The **Ready to Install** page opens.
- 7 Click **Install** to begin the installation.
When installation is complete, the InstallShield Wizard **Complete** page opens.
- 8 Click **Finish**.
- 9 Check the version of the client to make sure that the upgrade was successful. The version should be v6.3.

Reauthorizing access to a NetDocuments account

For AccuRoute Desktop Client and NetDocuments users only

AccuRoute Desktop Client and NetDocuments Error Message Appears After Upgrade

The following error message appears when attempting to profile a document after completing an AccuRoute Server and Desktop Client v6.1 to v6.3 upgrade.

“Failed to profile document. An internal consistency check has failed.”

AccuRoute in conjunction with NetDocuments support the OAuth (Open Authorization) New Refresh Token Issuance for enhanced security and flexibility. An upgrade to the AccuRoute Server, Desktop, and Queue from a previous installation will require a reauthorization of NetDocuments.

Reauthorizing Server access to a NetDocuments account

NetDocuments Reauthorization for Administrators

You must reauthorize the NetDocuments account if you have completed an AccuRoute Server, Desktop, and Queue upgrade.

To reauthorize the NetDocuments account

- 1 Start the Server Administrator.
- 2 Expand the **Server Administrator** tree; if necessary, and select Connectors.
- 3 Select the **NetDocuments on the Server** connector. The NetDocuments on the Server Properties dialog box appears.
- 4 Click the **Advanced** tab.
- 5 Click **Configure**. The NetDocuments Login Configuration dialog box appears.
- 6 Ensure the correct NetDocuments vault is selected and click **Authorize**. The NetDocuments

Authorize/Login dialog box appears.

- 7 Type your Administrator username and password in the appropriate boxes and click **Login**.
- 8 Click **Allow**.
- 9 Click **Finish**.

Reauthorizing Desktop Client access to a NetDocuments account

NetDocuments Reauthorization For AccuRoute Desktop Client Users

Every AccuRoute Desktop Client user must reauthorize his/her NetDocuments account after an AccuRoute Server, Desktop, and Queue upgrade.

To reauthorize the NetDocuments account

- 1 Start **AccuRoute Desktop**.
- 2 Select **Tools > Configure DMS > NetDocuments**. The NetDocuments Login Configuration dialog box appears.
- 3 Ensure the correct NetDocuments vault is selected and click **Authorize**. The NetDocuments Authorize/Login dialog box appears.
- 4 Type your AccuRoute Desktop Client username and password in the appropriate boxes and click **Login**.
- 5 Click **Allow**.
- 6 Click **Finish**.

Note This resolution only applies to users that are upgrading from a previous installation.

AccuRoute Queue Client

When you upgrade your AccuRoute Server, upgrade all instances of the AccuRoute Queue client in your environment. For more information on the AccuRoute Queue client, consult the [Install Guide](#) and the [User Guide](#).

To upgrade the AccuRoute Queue client:

- 1 Log in to the system where you have the client using an account that belongs to the local Administrators group.
- 2 Open Windows Explorer and navigate to `\\Servername\Clients\AccuRoute Queue`, where **Clients** is the network share folder containing the installation setup files. You must have configured this folder to give everyone access to the folder.
- 3 Run [install.exe](#).
The InstallShield Wizard configures the system and the **Welcome** message appears.
- 4 Click **Next**. The setup shows the license agreement.
- 5 Read the agreement carefully and if you agree to the terms, click **Yes**.
The **Choose Destination Folder** page opens. The default destination is `C:\Program Files\UplandAccuRoute\AccuRoute Queue`.

- 6 Click **Next** to select the default destination. The **Start Copying Files** page lists installation details you have supplied. If you want to install in a non-default location, click **Browse**, select the location and then click **Next**.
- 7 Click **Next** to begin the installation. When the installation is complete, the InstallShield Wizard **Complete** message appears.
- 8 Click **Finish** to close the wizard.
- 9 Check the version of the client to make sure that the upgrade was successful. The version should be v6.3.

Appendix: Upgrading AccuRoute Servers in a Cluster

When upgrading AccuRoute Servers that are part of a server cluster, follow the instructions in this section.

This section includes:

[Upgrading an AccuRoute Server cluster](#) (A-1)

[Using AccuRoute Connector for Lotus Notes in a cluster](#) (A-1)

Upgrading an AccuRoute Server cluster

- 1 Verify that there are no messages in the In Process queue. If there are, you must cancel the messages using the instructions in [Canceling messages in the In Process Queue](#) (2-4). You can resend the messages after the upgrade is complete.
- 2 Shutdown the secondary server of the cluster.
- 3 Upgrade the primary server using instructions in [Upgrading the AccuRoute Server](#) (3-1).
- 4 Shutdown the primary server.
- 5 Start the secondary server of the cluster.
- 6 Upgrade the secondary servers of the cluster using instructions in [Upgrading the AccuRoute Server](#) (3-1).
- 7 Start the primary server.

Using AccuRoute Connector for Lotus Notes in a cluster

If you are using the AccuRoute Connector for Lotus Notes in a cluster environment, all communication between the Lotus Notes server and the AccuRoute server is directed through the AccuRoute Connector for SMTP.