

Installing the M-Files update

If you have an earlier M-Files version installed on your computer, do not uninstall it before installing the new version. The M-Files setup program is designed to identify the earlier M-Files version automatically and will suggest updating the earlier version. The setup installs the new version and transfers the M-Files settings and other local data from the earlier version to the new version. Finally, the setup uninstalls the earlier version.

Perform the following tasks to update M-Files with a higher version:

1. Start the M-Files Setup for the new program version.
2. Accept the "Simple upgrade" option suggested by the setup.

When using the "Simple upgrade" option, the setup automatically chooses the same components for installation that were installed in the earlier M-Files version. The setup installs the new version and transfers the M-Files settings and other local data from the earlier version to the new version. Finally, the setup uninstalls the earlier version.

Recommended update installation order

Updating of the M-Files system to a higher version is recommended to be performed in the following order:

1. Update all workstations, i.e. M-Files Client installations.
2. Update the server and possible replica servers.

This installation order should be followed because the higher M-Files Client versions are compatible with the earlier M-Files Server versions. Use of M-Files can be normally continued after updating the M-Files Client with a higher version even though the M-Files Server is an earlier version. After updating M-Files Server with a higher version, the document vaults can no longer be used with earlier M-Files Client versions. For this reason, it is recommended to first update all M-Files Client installations and then the M-Files Server.

Many of the new properties of the higher M-Files version are not available until both the M-Files Client installations and M-Files Server have been updated with a higher version.

Example: An organization is updating M-Files 7.0 with M-Files 8.0. The administrators ensure that M-Files Client will be updated on all computers within one week. During this week, some users will begin using the new version before others, so old and new versions will be in simultaneous use during the transition period. Once all M-Files Client software has been updated, the administrator will then install the update on M-Files Server. All of the new properties of the higher version will then become available.

Preparing for fault situations

Before installing the update on M-Files Server, the administrator should ensure that recent backups of the document vaults are available. The backups may be useful should an unexpected fault situation occur during the server update.

In the event of a fault situation, contact M-Files technical support immediately. Do not attempt to rectify the fault, as solving the fault situation is usually much easier if no additional actions have been performed.

Automatic permissions

If you want to use the extended metadata-driven automatic permissions, these settings must be activated manually by vault when you are updating the vault to version 8.0. You can find this function in the advanced settings of the vault properties. If you have assigned automatic permissions to values in earlier versions of M-Files, it is strongly recommended to check that the permissions are still working as desired after activating them.

Service Releases

Service releases are smaller M-Files software updates that share the same main version number (e.g. 6.0) followed by the version ID for the service release. For example, versions 6.0.2325.10 and 6.0.2325.16 are service releases for M-Files 6.0. Usually, the service releases do not contain any new properties. Service releases are released if faults requiring repair are detected in the software or if compatibility with higher versions of other software requires changes to M-Files.

Service releases, such as 6.0.2325.10 and 6.0.2325.16, are fully compatible, so it makes no difference in which order they are installed, i.e. whether the service release is first installed on the workstations and then on the server or vice versa.

When installing the actual M-Files updates, however, e.g. version 7.0 to version 8.0, it is recommended to follow the installation order described above, i.e.: first update the workstations, and then the server.