

Installing M-Files Upgrades

The M-Files installer automatically detects the previous versions of the software and can migrate the settings from the old to the new version. Hence, do not uninstall any previous versions of M-Files before upgrading.

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

1. Execute the M-Files installer for the new version.
2. Select the "Simple upgrade" option.

With the "Simple upgrade" option selected, the setup automatically installs the same components that were installed in the earlier M-Files version. The setup installs the new version and transfers the M-Files settings along with all local data from the earlier version to the new version. Finally, the setup uninstalls the earlier version.

Note: M-Files 2015 includes significant improvements to the vault database structure. This means that – especially with large document vaults – the update process might take substantially longer than usual.

It is also recommended to ensure that the server computer has at least twice the amount of free space required by the metadata database file (.fdb file for Firebird and .mdf file for MS SQL Server databases). The database structure is updated automatically by the M-Files installer.

Installation preconditions

All versions

- M-Files Client cannot be used with an installation of M-Files Server that is two versions older.
- Replication servers must be the same version level as the main server.
- M-Files Server Tools are compatible with the same version of the server only.

Note: M-Files 10.x and M-Files 2015 Client software are not compatible with Windows XP. Please see upgrade instructions for Windows XP machines further below.

Versions 8.0 and earlier

- The version of M-Files Server cannot be newer than that of M-Files Client.
 - For instance, M-Files Client versions 8.0 and earlier are not compatible with M-Files 9.0, 10.x or M-Files 2015 Server, whereas M-Files Client 9.0 is.

You can use the following table to verify M-Files Client–Server compatibility.

M-Files	Client 6.0	Client 7.0	Client 8.0	Client 9.0	Client 10.x	Client 2015
Server 6.0	Compatible	Compatible	Not compatible	Not compatible	Not compatible	Not compatible
Server 7.0	Not compatible	Compatible	Compatible	Not compatible	Not compatible	Not compatible
Server 8.0	Not compatible	Not compatible	Compatible	Compatible	Not compatible	Not compatible
Server 9.0	Not compatible	Not compatible	Not compatible	Compatible	Compatible	Not compatible
Server 10.x	Not compatible	Not compatible	Not compatible	Compatible	Compatible	Compatible
Server 2015	Not compatible	Not compatible	Not compatible	Compatible	Compatible	Compatible

Supported installation order

M-Files Client is compatible with newer M-Files Server versions from version 9.0 onwards. In other words, if your organization is using M-Files 9.0 or later, upgrading to a newer version can be done either by first installing the new M-Files Server version or by first upgrading M-Files Client for the end users – the choice is yours. If your organization requires new M-Files Server features to be taken into use as fast as possible, M-Files Server can, and should, be upgraded first.

Some of the new properties of the higher M-Files version are not available until both the M-Files Client and M-Files Server have been upgraded to the new version.

M-Files 8.0 and earlier

For M-Files versions 8.0 and earlier, upgrading the M-Files system to a higher version should be performed in the following order:

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

This installation order should be followed because the one level higher M-Files Client version is compatible with the earlier M-Files Server version. M-Files can thus be normally used with the new M-Files Client installations even though the M-Files Server is of an earlier version. If you upgrade M-Files Server first, the document vaults can no longer be used with earlier M-Files Client versions.

Please see the table further above for ensuring M-Files Client–Server compatibility.

Preparing for the server upgrade

Before installing the upgrade on M-Files Server, make sure that your server fulfills the hardware and software requirements of the new version (see [M-Files 2015 Technical Data Sheet](#) and [M-Files 10.x Technical Data Sheet](#)).

The administrator should also ensure that recent backups of the document vaults are available. The backups may be useful should an unexpected fault situation occur during the server upgrade.

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.

Upgrading the M-Files OCR module to M-Files 2015

M-Files Server 2015 does not support the OCR module of the earlier M-Files versions, so you have to upgrade this module after upgrading the server software. See [instructions for enabling the M-Files OCR Module](#) for detailed instructions.

Upgrade instructions for organizations with Windows XP Clients

M-Files 10.x and M-Files 2015 Client software are not compatible with Windows XP computers. Organizations with both Windows XP and newer Windows client computers (Vista/7/8/8.1) are suggested to leave the 9.0 Client version on XP computers and upgrade Windows Vista/7/8/8.1 Clients to M-Files 10.x or M-Files 2015.

The only compatibility issue in the mixed environment with 9.0 and newer Clients is that inserted properties added with 10.x and M-Files 2015 Clients on MS Office and AutoCAD files cannot be resolved on 9.0 Client. This compatibility issue may cause issues with metadata structure replication as well.

When using the "Insert Property" feature on M-Files 10.x and M-Files 2015 Clients, the reference to the property value is made using the property GUID. In M-Files 9.0, the references are made using the property ID.

To resolve the issue on these mixed environments, 10.x and M-Files 2015 Clients can be enforced to make references to property definitions using the property ID. This configuration can be done by adding the following registry settings on each 10.x and 2015 Client computer:

Force the compatibility setting to all vaults (MS Office):

Key: HKEY_LOCAL_MACHINE\SOFTWARE\Motive\M-Files\<version>\Client\MFOfficeAddin
Name: UseIDBasedPropertyReferences
Type: DWORD
Value: 1 (default = 0)

Force the compatibility setting to all vaults (AutoCAD):

Key: HKEY_LOCAL_MACHINE\SOFTWARE\Motive\M-Files\<version>\Client\MFAutoCADAddin
Name: UseIDBasedPropertyReferences
Type: DWORD
Value: 1 (default = 0)

Force the compatibility setting to a specific vault (MS Office):

Key: HKEY_LOCAL_MACHINE\SOFTWARE\Motive\M-Files\<version>\Client\MFOfficeAddin\Vaults\<Vault GUID>
Name: UseIDBasedPropertyReferences
Type: DWORD
Value: 1 (default = 0)

Force the compatibility setting to a specific vault (AutoCAD):

Key: HKEY_LOCAL_MACHINE\SOFTWARE\Motive\M-Files\<version>\Client\MFAutoCADAddin\Vaults\<Vault GUID>
Name: UseIDBasedPropertyReferences
Type: DWORD
Value: 1 (default = 0)

Note: Vault-specific settings have precedence over the client-specific settings.

Installation sequence:

1. Deploy registry settings described above on all Windows Vista/7/8 client computers.
2. Upgrade M-Files Client on Windows Vista/7/8 workstations to M-Files 10.x or M-Files 2015.
3. Upgrade M-Files Server to M-Files 10.x or M-Files 2015.

Service releases

Service releases are smaller M-Files software upgrades that share the same main version number (for example "10.0"), followed by the four-digit version ID. For instance, the version 10.0.3911.85 is a service release for the original 10.0 release (version 10.0.3911.3).

Service release versions are fully compatible between each other so they can be installed in whichever order. In other words, whether the service release is installed first on the workstations and then on the server, or vice versa, makes no difference.

Centralized deployment via Group Policy

You can use the Windows Group Policy feature to automatically distribute M-Files to client computers. Alternatively, you may use any other centralized deployment mechanism that you are familiar with. You can also customize the behavior of the M-Files setup program. For further information on these options, refer to [M-Files Setup: Advanced User's Guide](#).