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# ***Managing DataFax Hardware and Software Upgrades***

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## the Preview...

- Roles in a typical DataFax group
- Upgrade types
- Problems
- After the Upgrade



## Roles

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- Data Analysts and Statisticians
- Database Manager/Programmer
- Clinical Research Associates
- Data Entry Clerks
- DataFax User Consultant
- DataFax System Administrator



## DataFax System Administrator

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- Key role in any upgrade
- Responsible for planning and managing the upgrade process



## User Consultant

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- Also a key role in the upgrade
- Liaison role – maintain communication with other stakeholders during the planning and upgrade process



## Upgrade Classification

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- Adding capacity
- Upgrading existing hardware
- Upgrading software to latest release



## Adding Capacity

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- Easiest to manage from a stakeholder perspective
- Often the existing environment can be left alone



## Existing Hardware Upgrade

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- Trickiest upgrade
- Affects all stakeholders
- Potentially disruptive without careful planning



## Latest Release

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- Easiest to manage from System Admin's perspective
- also potentially disruptive



## Hardware Upgrade Laundry List

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- Let us know what your new hostid is as soon as possible so we can generate a new key for you
- Let your sites know what's going on
- Install DataFax on the new machine **following the Installation Guide**
  - run DFsystem -i to update the license
  - configure incoming and outgoing etc.



## Existing Hardware Upgrade

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- Use the same user and group id numbers on the new system
- Configure and test your new system
- Shut down datafax and hylafax on both systems BEFORE copying over any data



## What should I copy?

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- \$DATAFAX\_DIR/work
- \$DATAFAX\_DIR/incoming (sequence)
- \$DATAFAX\_DIR/archive
- \$DATAFAX\_DIR/identify
- DFstudies.db from \$DATAFAX\_DIR/lib (after editing hostname and path)
- The study directories



## Initial Startup

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- run \$DATAFAX\_DIR/SETPERMS
- start hylafax and datafax
- run the latest version of the ATK
- run DFstudyPerms -f on each study
- watch \$DATAFAX\_DIR/work/errors



## Latest Release

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- Who's running 3.5-003? 3.6? 3.7-002?
- Is re-validation the issue?



## Validate on a Test Server

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- Install the SAME version of DataFax on your test server as you currently have in production
- Obtain the latest full release CD-ROM and download all patches and updates
- **READ THE RELEASE NOTES and INSTALL THE PATCHES IN ORDER**



## Validation on a Test Server

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- Install the latest version of the DataFax ATK and run the ATK
- Perform any validation steps your SOPs require
- Find a suitable time to shut down your production server and do everything again



## When things go wrong

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- Talk to people who have done it before
- Let us in on your plans
- Follow the Installation Guide and keep track of your steps
- Call us if you need help



## but wait... there's more

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- Meet with the entire DataFax group
  - What went right
  - What didn't
- Learn from your experience

