Best Practices for OnBase System Administrators

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Agenda

• Incremental, Parallel Upgrades
• Virtual Server Technology
• Best Practices in Storage and Backup
• Daily, Weekly and Monthly Tasks
• Questions and Answers
Incremental, Parallel Upgrades

• What is it
  – A phased approach to upgrading OnBase, allowing both the old and new versions of OnBase to run in parallel

• Why
  – It can greatly reduce the risk of production downtime
  – It can greatly reduce the impact to the non-upgraded user community

• Does it apply to my version of OnBase
  – Yes (works for all versions)
Incremental, Parallel Upgrades

• Upgrades of the past - Big Bang Approach
  – All users and all departments were impacted
  – Limited window to perform upgrade (generally a weekend, or long holiday)
  – Getting each department to test their solution prior to the upgrade was a challenge
  – All OnBase servers/components/client PCs upgraded at once
  – After the upgrade, wait to see what fires you need to put out, and hope you can
Incremental, Parallel Upgrades

- Upgrades of the future - Parallel Upgrades
  - Phased approach that takes place over 30, 60, 90 or more days
  - Upgrade only a few components and users/departments at a time
  - Previous version remains available, if an issue occurs, impacted users can revert to using the previous version
Incremental, Parallel Upgrades

NOT an excuse to skip testing
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Incremental, Parallel Upgrades

... and for the test afterwards, “Parallel Upgrades are ______”? 

NOT an excuse to skip testing
Incremental, Parallel Upgrades

• High-level step-by-step process
  1. Upgrade the Production database
  2. Deploy new Web Servers, Thick Clients, etc. as needed
  3. Allow small groups of users to use the new version (while most users use the older version) if an issue is found, the small group of users simply logs in with the older client
  4. Once the small group has used the system for a time and found no issue (maybe a week) phase the remaining users to the new version
  5. Decommission the old components
Incremental, Parallel Upgrades

Current 9.2 OnBase system with both thick and thin clients
Incremental, Parallel Upgrades

Current 9.2 OnBase system with database upgraded
Incremental, Parallel Upgrades

Parallel 9.2/11.0 OnBase system
Incremental, Parallel Upgrades

OnBase 11.0 system
Incremental, Parallel Upgrades

• Other uses – nontraditional “upgrades”
  – Deploy new department on latest version of OnBase instead of your current version
  – Deploy new OnBase features, such as:
    • Unity Client
    • Advanced Capture/OCR
    • Unity Briefcase
    • Web Server
    • Etc.
Incremental, Parallel Upgrades

- Hyland Community

Read the blog, post questions, find the PDF

Technical / OnBase Technical Forums / Upgrading – Incremental and Parallel
Virtual Server Technology

Dispelling the myths

• It is not supported – Not True
  – OnBase fully supports virtual environments – in fact OBOL (OnBase OnLine) runs on virtual servers

• It is for small systems only – Not True
  – One of the largest OnBase customers is 100% virtual
    • 1.2 TB MSSQL database (220M documents, 250,000 new documents a day and 1.2B transaction log events)
    • 8 TB disk group storage
    • ~20 processing stations (DIP, COLD, Fax, Workflow timers, export, etc.)
    • 1,000+ active users
Virtual Server Technology

• Examples of things made easier with virtual technology
  – Creating a test environment
  – Applying OS Server Packs and upgrading software – create a snapshot of the machine to roll back to if needed
  – Spinning up a new server for the Parallel Upgrade process
  – DR/HA
Virtual Server Technology

• Closing items
  – Follow Virtualization technology on the Hyland Community site
  – Additional Virtual, Storage and O/S tuning may be required to get the most out of your investment – you just don’t run “setup.exe” anymore
Best Practices in Storage and Backup

Backup Database + Backup Disk Groups

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(Sleep like an overworked admin)
Best Practices in Storage and Backup

• Database Backups
  – This requires an agent, simple file level backups will NOT work
  – Full database backup nightly
  – Transaction log backups every 1-2 hours, shorter as needed by your DR plan – to a separate server if at all possible
  – Verify they are archived to tape (or other long term storage media)

“A backup is like a parachute” – you only know it is good if you have tested it
Best Practices in Storage and Backup

• Disk Group Backups
  – Leverage OnBase’s support for multiple copies
  – As the size of your system grows it will become harder to do a full backup of your disk group on a regular basis – talk to us about options
  – Verify they are archived to tape (or other long term storage media)

“A backup is like a parachute” – you only know it is good if you have tested it
Best Practices in Storage and Backup

• Simple trick to check if files are being backed up – the ‘A’ attribute should be missing on files that are backed up
  ***
  Works for most backup s/w
Best Practices in Storage and Backup

Nothing beats a test run

Find the time to do a test restore, in an isolated environment, of your full system (database and disk groups). Spin the system up and use the OnBase native tools, such as Platter Management, to ensure everything was restored.

Better to do it on your schedule as opposed to Mother Nature’s schedule.
Daily, Weekly and Monthly Tasks

Don’t wait for your OnBase system to catch a cold, check its health regularly

The Hyland User Training Site has a number of good classes/videos on what a System Admin should know about supporting their system (see the Task Card Series)
Daily, Weekly and Monthly Tasks

• Daily Tasks (or weekly)
  – Check Verification Reports (or build a workflow to do it for you)
  – Check the Window’s Event Logs for any Error, Warning, and even unexpected Informational entries (or find a tool to notify you)
Daily, Weekly and Monthly Tasks

- **Weekly Tasks**
  - Verify database and disk groups were backed up to tape
    - check the ‘A’ attribute
    - ask your back team how big the OnBase related backup was – it should grow every week
  - Check to ensure you have available disk space on the servers *** a database server can eat up 3-4 GB in one shot, so don’t operate too close to the edge
  - Check all DIP/COLD/input folders for any files or folders – there should be none
Daily, Weekly and Monthly Tasks

• Monthly Tasks
  – Verify database maintenance plans are still operating within the time window you expect
  – Check database and disk group sizes and anticipate when additional storage might be needed
  – Analyze recent disk group volumes to ensure all files are present and byte-wise compare to 2nd, 3rd, etc. copies to ensure all files are valid (schedule this via platter management)
Questions and Answers

• Don’t forget these resources
  – ImageSoft Support is there for you
  – Hyland Community Site
  – Hyland Training Site