



Sixth Edition Upgrade Considerations

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What Do I Receive as Part of my Subscription?

Your annual subscription provides you with access to the following:

1. Sixth Edition Upgrade Installation files with documentation
2. Upgrade considerations document
3. Upgrade checklist
4. A What's New .PDF of the new 6e features
5. A link to a recorded Sixth Edition What's New training session
6. Quick start guide to quickly familiarize existing users to the new and updated features

Sixth Edition Service Offerings:

Server & Project Upgrade

In the event you do not choose to upgrade yourself, Newforma Services is providing a service to upgrade the Newforma software on your Newforma Project Center Server(s), Info Exchange server, and projects (Note: Customer is responsible for the upgrade of the Newforma client software)

Additional Services available

- Sixth Edition What's New Training
- Batch Project/Contact Creation
- Deltek Vision Integration
- Form customization

If you are interested in having our team assist with any of these items, please email services@newforma.com and we can send you an estimate to get your work scheduled.

Hardware Considerations

Newforma was conscientious about ensuring that Sixth Edition would perform well on the same hardware on which Fifth Edition ran. Please see the "NPC Sixth Edition System Requirements.pdf" in the Upgrade or Welcome Package.

Software Considerations

Update Microsoft Office to Latest SP

Sixth Edition requires that the Microsoft products installed on servers and the clients be on their latest service pack. For example Outlook 2003 or 2007 installed on the server and client machines need to be on SP1 for Sixth Edition.

Configure MySQL to Manage Multilingual Characters

The MySQL databases on Newforma Info Exchange and Project Center Servers must be configured to manage multilingual characters. In the upgrade documents for both server types, there are instructions on how to configure the database to do so.

Set Outlook to run in Non-Cached Exchange mode

On the Project Center Server (not on the clients) it is necessary to ensure that Outlook is configured to NOT run in cached exchange mode to help ensure that the automated filing of emails be as robust as possible. In the upgrade document Project Center Server, there are instructions on how to configure Outlook to run in non-cached Exchange mode.

Upgrading Info Exchange ahead of schedule (**not supported**)

In past releases, because different editions of the Info Exchange could co-exist on the server, it was possible to upgrade Info Exchange well ahead of upgrading the rest of the servers, clients and projects. In Sixth Edition, however, when Info Exchange is installed it makes some fundamental changes to the MySQL database, effectively taking Fifth Edition off-line. For this reason, it is important *not* to upgrade Info Exchange until you are ready to upgrade the Project Center Servers, clients and projects.

Process Summary

The process, in a nutshell, is as follows:

<i>Steps</i>	<i>~ Time</i>
1. Verify the servers are ready to accept Sixth Edition (a verification utility will be provided with the Sixth Edition transmittal)	0:05/server
2. Install and configure Info Exchange Sixth Edition on the Info Exchange Server (redirects for the Fifth edition site are provided in the Sixth Edition installer – it is recommended that Fifth edition not be uninstalled for ~1 month after Sixth Edition is installed).	0:30/server
3. Uninstall Project Center Fifth Edition client (not the server) from the Project Center Server(s)	0:05/server
4. Install and Configure Project Center Server Sixth Edition	0:30/server
5. Upgrade the projects: <ol style="list-style-type: none">Make sure all users are out of the projects – Newforma requires exclusive write access to the projects in order to upgrade themNewforma has seen projects upgrade at a rate of ~350 projects per hour. This is a rough estimate but should be a decent predictor of how long the process will take. Projects with a lot of Action Items, Transfers, Submittals, etc. (often older projects) will take longer to upgrade than projects with a smaller number of these items.	350/hour
6. Upgrade Newforma Project Center on your users desktops	See below

Client Upgrade

Depending on the method used to install Fifth Edition, the time to upgrade to Sixth Edition will vary.

Manual Installation

It is **NOT** necessary to uninstall Newforma Project Center ***Fifth Edition*** prior to installing Newforma Project Center Sixth Edition. The Sixth Executable performs an uninstallation of Fifth Edition as part of its installation.

If the client is to be manually installed, the process takes ~2 minutes per desktop and requires that Outlook be closed.

Automated Installation

Provided methods similar to the ones utilized to publish Fifth Edition (i.e. a “.bat” file was pushed to install Fifth Edition) it is **NOT** necessary to uninstall Newforma Project Center ***Fifth Edition*** prior to installing Newforma Project Center Sixth Edition. The Sixth Executable performs an uninstallation of Fifth Edition as part of its installation.

Newforma has noted some issues replacing the Fifth Edition deskbar with the Sixth Edition deskbar (resulting in two deskbars). In addition, we have made some useful updates to the .bat script including the use of a local cache directory when deploying the 64 bit version of Newforma Project Center. We have provided explicit instructions in the “Newforma Project Center Sixth Edition Upgrade.doc” to help manage these issues and considerations.

Please read the “Newforma Project Center Sixth Edition Upgrade.doc” in its entirety if you plan on pushing Newforma Project Center through Active Directory.

Forms and Templates

Project and Contact Creation Template Considerations

The Fifth Edition Project and Contact Templates used to either create projects or contacts from Deltek (or other database) or through a batch process will not work in Sixth Edition due to some format changes and additions. Explicit instructions on which templates and what changes need to be made to those templates are provided in the Project Center Server Sixth Edition Upgrade document which will be delivered with the Upgrade transmittal.

Deltek Integration Considerations

Aside from the template files themselves (.xls files) a change to the location to which callbacks are made from Deltek has been made. Explicit instructions on the new URL are provided in the Project Center Server Sixth Edition Upgrade document which will be delivered with the Upgrade transmittal.

Customized Forms and Notifications

Custom forms can be copied and paste from Fifth Edition to Sixth Edition **without exception**.

If additional customization is desired in Sixth Edition, you can customize templates using InfoPath to change fields, fonts, and logos in the templates.

The Project Center online help provides step-by-step instructions on how to customize the templates. Refer to the online help topic “[Start Customizing and Using Form Templates](#)” for more information. In addition to help, there is a document provided in your upgrade transmittal called “**Newforma Default Templates – Sixth Edition.doc**” which provides explicit usage, examples and suggestions on how and which templates might be customized.

Project Administration Considerations

Managing Info Exchange items

Newforma Sixth Edition has moved all of the Info Exchange Administrative capabilities into the Project Center Administration console. The logo for your Info Exchange login page (as well as the default logo for your transmittal forms) can be updated via the Project Center Administration console.

In addition, the Terms and Conditions are now accessible in the Project Center Administration console allowing for easier updates for any updates or changes to the Terms and Conditions.

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The contents of this manual are subject to change without notice.

Please read this entire manual carefully before beginning installation. Although the procedures described in this manual are based on the current best known practices of Newforma, Inc., these procedures may not work for you in your particular computing environment.

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If you have questions about the information in this manual or about installation procedures, please contact Newforma, Inc.

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