

AI SERVER

POSTGRESQL 14.0 – 18.0 MIGRATION GUIDE

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Table of Contents

About Exterro 3

Purpose of the Document..... 3

AI Server - PostgreSQL Database Migration Steps..... 4

 Overview & Objective 4

 Step-by-Step Migration Instructions 5

Contact Exterro 11

About Exterro

Exterro was founded with the simple vision that applying the concepts of process optimization and data science to how companies manage digital information and respond to litigation would drive more successful outcomes at a lower cost. We remain committed to this vision today. We deliver a fully integrated Data Risk Management platform that enables our clients to address their privacy, regulatory, compliance, digital forensics, and litigation risks more effectively and at lower costs. We provide software solutions that help some of the world's largest organizations, law enforcement and government agencies work smarter, more efficiently, and support the Rule of Law.

Purpose of the Document

This guide provides step-by-step instructions for migrating your AI server databases from **PostgreSQL 14.x** (used in FTKC 8.2) to **PostgreSQL 18.x** (standardized in FTKC 8.3).

AI Server - PostgreSQL Database Migration Steps

Overview & Objective

The primary objective of this migration is to transition your AI server environment seamlessly to PostgreSQL 18.x (e.g., 18.4) without data loss, workflow disruption, or manual SQL intervention.

Why Upgrade to PostgreSQL 18.x?

- **Standardization:** FTKC 8.3 adopts PostgreSQL 18.x as its default, fully supported database engine.
- **Performance:** Enhanced query planning and significant performance optimizations over version 14.x.
- **Core Functionality:** Essential AI server capabilities, including image search, property data, and case chunk preprocessing, rely on PostgreSQL 18.x to function correctly.

Scope of Migration:

Included in Migration	Preserved Elements
Only AI server databases: <i>ai_property, ai_image_search & all case_* databases.</i>	All existing data, database objects, schemas, tables, indexes, constraints, sequences, and views (migrated completely as-is).
All database roles and user permissions.	The pgvector extension (used for embedding searches) is automatically verified on both source and target instances.

Step-by-Step Migration Instructions

Prerequisite:

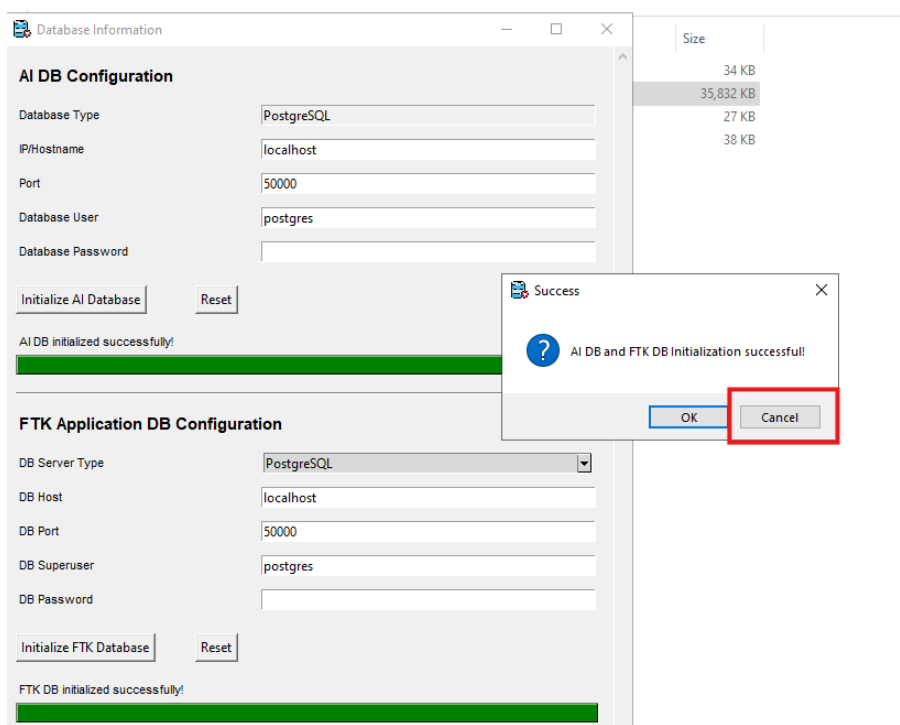
Ensure you have a complete, verified backup of your existing PostgreSQL 14.x databases before proceeding.

Migration Steps:

1. Navigate to the following path on your server:

```
C:\Program Files\AccessData\ai_server\db_config\
```

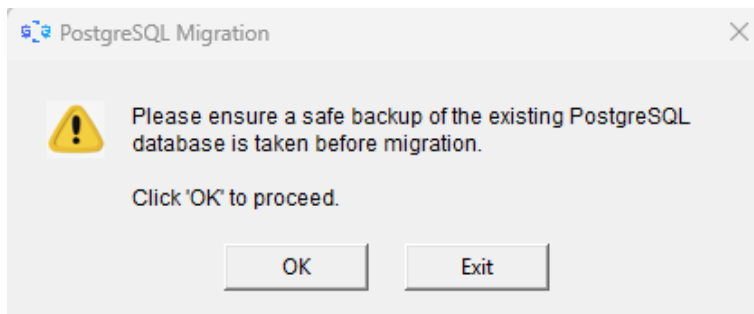
2. Right-click **db_config.exe** and select **Run as administrator**.
3. If an initial initialization success dialog appears over the main configuration window, click **Cancel** to close that specific prompt and keep the tool open (clicking 'OK' will close the tool).



- From the bottom of the **FTK Application DB Configuration** panel, click the **Migrate PostgreSQL Data** button.

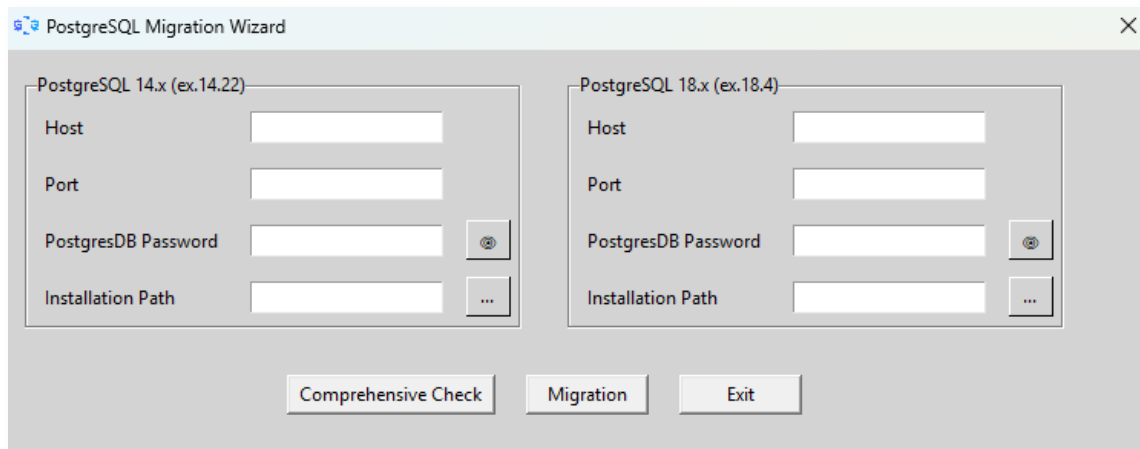
The screenshot shows two panels in a software interface. The top panel, titled 'Database Information', contains fields for 'Database Type' (PostgreSQL), 'IP/Hostname' (localhost), 'Port' (5432), 'Database User' (postgres), and 'Database Password'. Below these are 'Initialize AI Database' and 'Reset' buttons. A green progress bar and the text 'AI DB initialized successfully!' are visible. The bottom panel, titled 'FTK Application DB Configuration', contains fields for 'DB Server Type' (PostgreSQL), 'DB Host', 'DB Port', 'DB Superuser', and 'DB Password', with 'Initialize FTK Database' and 'Reset' buttons. At the bottom of this panel, the 'Migrate PostgreSQL Data' button is highlighted with a red rectangle.

- A warning dialog box will appear stating: *"Please ensure a safe backup of the existing PostgreSQL database is taken before migration."*



- If your backup is complete, click **OK** to open the Migration Wizard. (Click **Exit** if you need to pause and take a backup).

6. In the **PostgreSQL Migration Wizard** window, fill out the connection parameters for both environments:



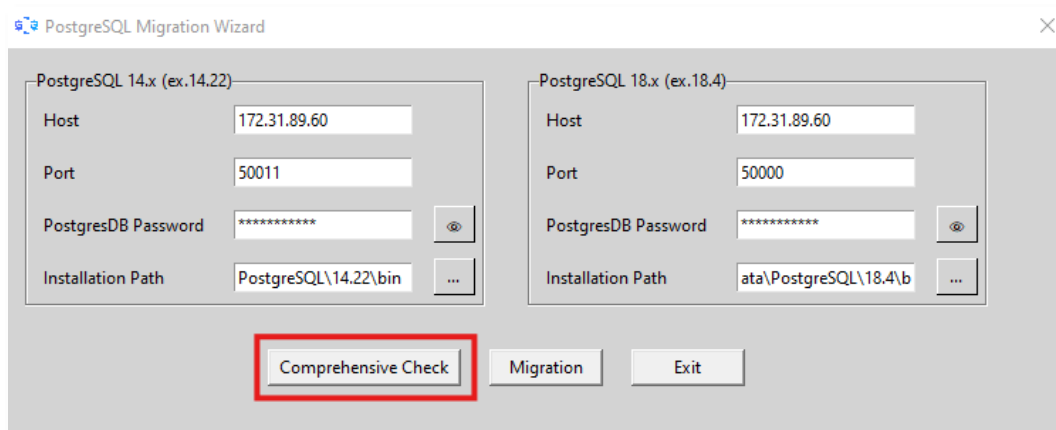
- **Source (PostgreSQL 14.x):**

- **Host:** IP address or hostname of your current DB server.
- **Port:** (e.g., 50000)
- **PostgresDB Password:** Your master database password.
- **Installation Path:** The path to your 14.x binaries.
 - Both local paths and shared/network paths are supported.
(e.g., *C:\Program Files\AccessData\PostgreSQL\14.17\bin*) and
(e.g., *\\172.31.93\C\$\Program Files\AccessData\PostgreSQL\14.17\bin*)

- **Target (PostgreSQL 18.x):**

- **Host:** IP address or hostname of your new DB server.
- **Port:** (e.g., 5432)
- **PostgresDB Password:** Your target database password.
- **Installation Path:** The path to your 18.x binaries
 - Both local paths and shared/network paths are supported.
(e.g., *C:\Program Files\AccessData\PostgreSQL\18.4\bin*).

7. Once all paths and credentials are typed in, click the **Comprehensive Check** button.



8. The wizard will automatically run pre-migration health checks, including:

- Verifying database connectivity to both instances.
- Validating PostgreSQL versions and checking for the pgvector extension.
- Confirming pg_dump and pg_restore utilities exist in the specified paths.
- Verifying that sufficient disk space is available for the operation.

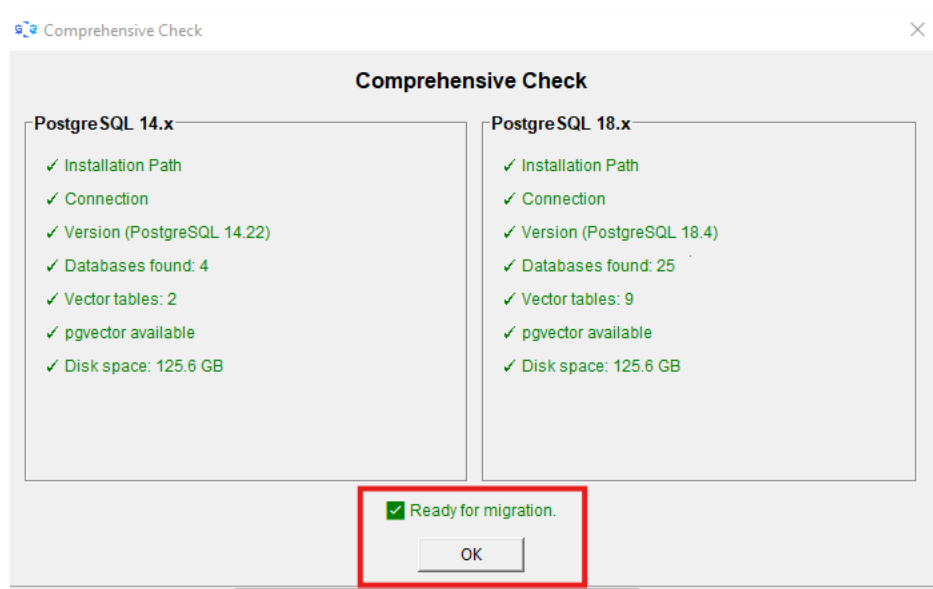
Troubleshooting Validation Failures:

If any pre-check or validation step fails, the wizard will display an error message such as:

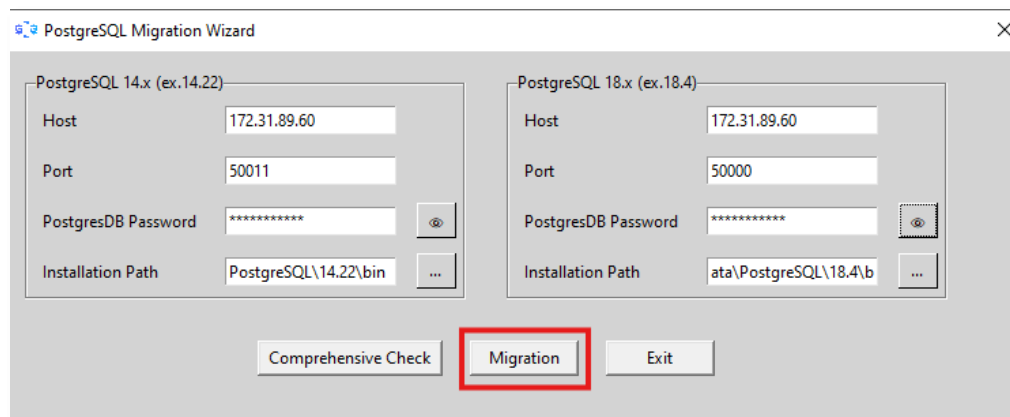
- Incorrect host IP, port configuration, or password typos.
- PostgreSQL utility binaries missing from the specified installation paths.
- The pgvector extension is not installed/available on either instance.
- Insufficient disk space on the target machine.
- The underlying Windows services for either the Source or Target PostgreSQL instances are stopped.

Remediation: Resolve the reported infrastructure issue, return to the wizard, and click **Comprehensive Check** again.

9. When all items in the validation checklist display a green checkmark, a **"Ready for migration"** status will appear.



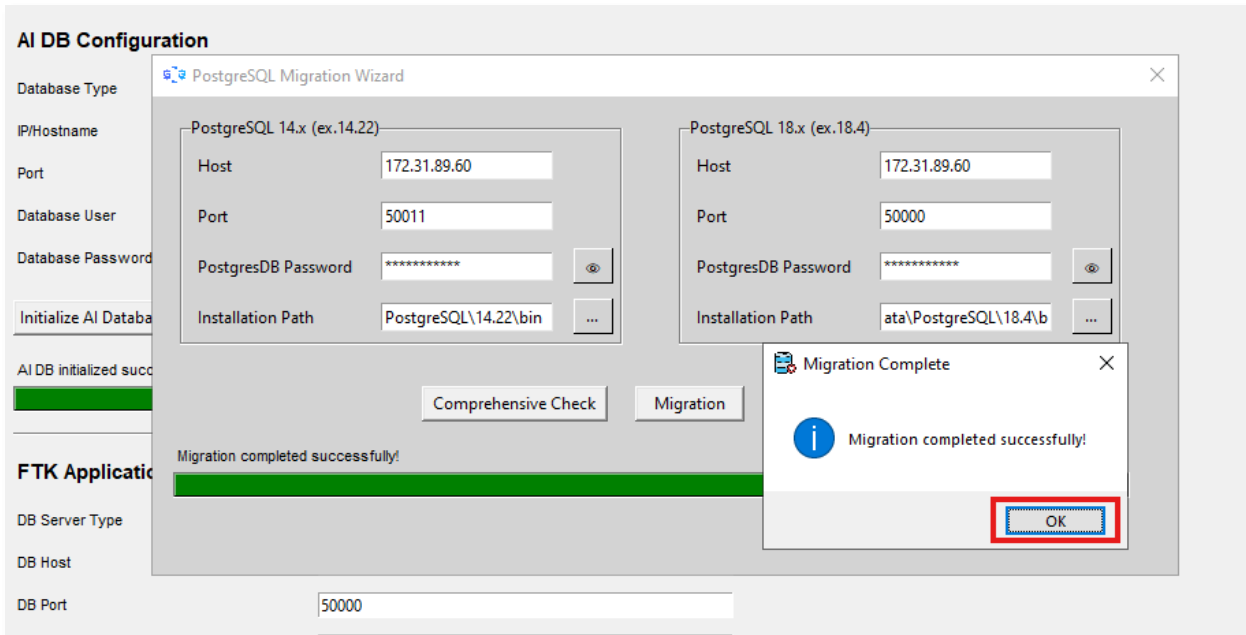
10. Click **OK** to close the health checkup pop-up window.
11. Click the **Migration** button located at the bottom of the main wizard layout.



12. The system will begin processing the end-to-end migration.

Note: Do not close the wizard, log out of the server session, or interrupt the network connection while the green progress bar is running.

13. Upon successful completion, a **Migration Complete** dialog box will pop up displaying the message: *"Migration completed successfully!"*



14. Click **OK** to close the prompt.
15. Close the Migration Wizard.

Your FTKC 8.3 AI server is now fully configured to use the upgraded, high-performance PostgreSQL 18.x database instance.

Contact Exterro

If you have any questions, please refer to this document, or any other related materials provided to you by Exterro. For usage questions, please check with your organization's internal application administrator. Alternatively, you may contact your Exterro Training Manager or other Exterro account contact directly.

For technical difficulties, support is available through support@exterro.com.

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