
halFILE Server Move

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Overview

The following provides the basics for moving halFILE to a new server. You should have a working knowledge of Windows servers, networks and SQL Server to undertake this task. This covers the basics of halFILE and may not discuss special or extended applications that you may have that support halFILE.

Moving SQL Server databases to a new server

Install the SQL Server software. Normally you would set the sa password to the same password as on the old server. If not, then be sure to update the database user id and password credentials in halFILE (see Database Credentials below).

The best/fastest way to move your halFILE SQL Server databases to the new server is using the detach/attach features of SQL Enterprise Manager (SQL 2000 and earlier) or SQL Management Console (SQL 2005 and forward).

1. Review the database parameters to determine the location of the database files (having extensions of MDF and LDF).
2. Detach the databases from the old server.
3. Copy the MDF and LDF files to the new server.
4. Attach the moved database files to the new server.

The halFILE database files include HFWParams, EHFAccounting (if e.halFILE is installed), xxxHFWdd and xxxBSKdd (where xxx is the halFILE Application ID and dd is the halFILE Database ID). For halFILE 3.0 or later you may also have xxxTXTdd.

Note: *if you do not have SQL Enterprise Manager or Management Console then you must use the SQL command line utility, OSQL, to detach and attach databases.*

Note: *If you are moving forward more than one version of SQL the attach/detach will not work and the tables will need to be built manually and data imported using SQL's BCP utility. The database backup files located in /database/backup can be used in this case. SQL Versions in order of release are: SQL 7, SQL 2000, SQL 2005, SQL 2008, SQL 2008 R2, SQL 2012.*

Installing the halFILE Application

For Terminal Server and Citrix Server installations, halFILE must be installed on the new server as well as any logon server by using the workstation setup logged in as administrator. This is located in \\server\share\halfile\install\workstation\setup.exe

In order to move halFILE, you should first copy the entire contents of the halFILE folder over to the new server. This will copy not only halFILE program components but also ini files, reports, basket folders, and other files required by halFILE. Also, build the appropriate share if halFILE is to be run via a UNC path.

Then, install halFile on the new server by running setup.exe file from the install\workstation folder. Be sure to point to the shared halFILE program folder as the target location.

You should also install other supporting applications including Crystal Reports and Imaging for Windows. *See the Windows 7 Installation document in the Support section of halFILE.com.*

Archived Images

If you are moving archived images to a new server then the following is required:

1. Copy all the images to the new server, retaining the folder structure.
2. Share the top level archive folder. Review the shares on the old server to make sure this is done at the correct folder level.
3. Update the Drive in Configure Drives to point to the new location. Remove the old drive location from the list.

Basket Images

1. Change basket path locations by updating the QueueLocation field in the HFWParams.Queues table to reflect the new server location. (Also in the File_Baskets menu of the halFILE Administrator).
2. Set the Root Basket Path in General tab of Tools-Options in the halFILE Administrator.

Database Credentials

1. Change all the file dsns on the new server to point to new server name. These dsn files are located in the halfile\dsn folder and can be modified using notepad.
2. Run creatdb.exe from the halFILE folder to point to new server and the user id and password to connect. You can also set the default folder for new databases here. If the new server is running SQL Server 2005 or higher, click the Advanced tab and set the DB Space Allocation and Log Space Allocation to 3 (for 3 MB).
3. If the database security user id or password was changed then update the Database User ID and Database Password for all databases in the HFWParams.DocumentTypes table or by using the ODBC Info screen behind the File_Databases menu of the halFILE Administrator.

Other Requirements

Be sure to point all of the icons on the workstations to the new server. And unplug the old server or stop the SQL Server Service and rename the halFILE folder to ensure that no users are accessing the old server. Then fully test halFILE, introducing new documents via scan or import, indexing and searching for documents. Check each database to be sure it is accessible.

Run "halfile.exe /regserver" from the new installation location to avoid error 48 errors after you get everything running.

Reports

Change the paths of the reports by performing a search, clicking the reports button then editing the report. This can also be found in the Reports table of each xxxHFWdd database.

SQL Server Jobs or Scheduled Tasks

Typically there are SQL Server Jobs or Scheduled Tasks set up to (1) backup halFILE databases and (2) archive indexed documents.

SQL Server Jobs

If these were SQL Server Jobs, the best way to place them on the new server is to script them out on the old server, then run them in Query Analyzer on the new server to create the jobs.

The SQL Server Agent must be started automatically on the new server. Alternatively you can re-create the jobs manually, step-by-step, by reviewing them on the old server and setting them up on the new server.

Scheduled Tasks

Scheduled tasks must be set up on the new server manually. Review the tasks on the old server to get the information and schedule to set up on new server.

Auto Archive

The Auto Archive jobs run HFArchive32.exe. Typically, there is at least one Archive Set for each halFILE database. You should go into the Tools-Archive Setup menu of the halFILE Administrator and review the destination parameters for each archive set to be sure it points to the correct archive location.

Note: Even though the drive list may appear correctly when reviewing this list be sure to click save for each archive set to update with the new location.

halFILE Database Backups

The database backup jobs run the stored procedure sp_hfwbackup or the program HFBackup.exe (preferred).

HFBackup

```
\\server\halfile\hfBackup.exe <\\server\halfile\database\backup> <SQLSERVER> <sa> <pwd>
```

- \\server\halfile\ is the halFILE program folder
- \\server\halfile\database\backup\ is the path where the backup files are saved
- SQLSERVER is the name of your SQL Server
- sa is the SQL Server administrator user id
- pwd is the password

HFBackup.exe backs up every halFILE database found plus HFWParams.

SP_HFWBackup

To create this stored procedure, run halfile\scripts\system\sp_hfwbackup.sql against master.

Be sure to schedule sp_hfwbackup for every halFILE database. The command line for this script includes destination path so check that to be sure it exists on the new server.

Ex: sp_hfwbackup
'xxxHFWyy','\\server\share\halfile\database\backup\','ServerNameorIP','sa','password'

Note for SQL Server 2005: For this stored procedure to run under SQL Server 2005, the following script must be run in Query Analyzer under the Master database:

```
sp_configure 'show advanced options', 1
go
RECONFIGURE
go
sp_configure 'xp_cmdshell', 1
go
RECONFIGURE
go
```

InstallShield Launch Issue

When Installshield (the program used to install halFILE) encounters what it believed to be missing files, it will attempt to re-launch the halFILE installation routine. To avoid this issue, you can do the following:

1. Download cleanup.exe from <http://download.halfile.com>.
2. Extract to the cleanup folder underneath your halFILE program folder.
3. Edit remove21.bat, remove22.bat, and remove30.bat to correct the location of the cleanup folder.
4. Run remove21.bat (for halFILE 2.1), remove22.bat (for halFILE 2.2), and remove30.bat to remove the registry settings that make it attempt to launch the Installshield install.

Furthermore, you can configure halFILE's deliver feature to run the above batch files when a user goes into halFILE. Go into the halFILE Administrator and the Tools-Options menu. Select the deliver tab and then use the Shell Programs section to run the remove21.bat and/or the remove22.bat. It will only run the batch file one time per station.

Print To halFILE Under Terminal Services

If you run halFILE under Terminal Server (or Citrix) and use the Print to halFILE feature, there is a new version of the Print to halFILE software. Contact hal Technical Support for installation and set up instructions.