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# halFILE Server Move

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## SQL Server Only

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### Contents

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Overview .....	1
Moving SQL Server databases to a new server.....	1
Detach/Attach Method .....	1
HFRestore Method.....	2
Scripting SQL Jobs .....	2
For SQL Server Agent jobs.....	2
For Scheduled Tasks.....	3
Database Credentials .....	3
Testing the new Server .....	3
SQL Server Jobs or Scheduled Tasks .....	3
Resolving Connection Errors.....	3
SQL Default Installs .....	3
SQL Named Instance Installs.....	4

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### Overview

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The following provides the basics for moving halFILE to a new database server. You should have a working knowledge of Windows servers, networks and SQL Server to undertake this task. This assumes that halFILE images and the halFILE host server remain unchanged.

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### Moving SQL Server databases to a new server

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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).

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### Detach/Attach Method

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The best/fastest ways to move your halFILE SQL Server databases to the new server are as follows. This work is done in SQL Enterprise Manager (SQL 2000 and earlier) or SQL Management Console (SQL 2005 and forward).

1. Using the detach/attach features. Detach the databases from the old server, copy the database files to the new server (MDF/LDF files), then attach the copied database files on the new server.
2. Stopping the SQL Server service on the old SQL Server. Then copy the database files to the new server (MDF/LDF files) and attach the copied database files on the new server.

Before starting, review the database parameters to determine the location of the database files (having extensions of MDF and LDF).

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 may 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.

## HFRestore Method

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As an alternative to the above Attach/Detach method, hal Systems offers a utility called HFRestore that can create SQL tables inside a database and import the halFILE database backup files. With this utility, the user:

- Specifies the SQL Server connection information
- Selects the folder where the halFILE database backup files reside (typically halfile\database\backup)
- Selects which tables to restore
- And the tables are created then imported using SQL Server bcp utility.

**Note:** This utility is typically run on the SQL Server where it will have access to the bcp utility.

**Note:** The user should ensure the the database backup files are the most recent version of the data. If the halFILE database backup job has not been running, then an old copy of the database would be imported.

## Scripting SQL Jobs

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Besides the above database files, you may also have some halFILE SQL Jobs that are configured in SQL Server Agent or Task Scheduler on the SQL Server. Typically there are SQL Server Jobs or Scheduled Tasks set up to (1) backup halFILE databases and (2) archive indexed documents. These must also be moved to the new server.

### For SQL Server Agent jobs

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1. In SQL Server Management Console, right click on the job and select Script Jobs As-Create To-New SQL Server window. Then save the query to the new server.
2. Run the created query on the new server to create the job.

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. Also, be sure to set the SQL Server Agent to start automatically on the new server.

## For Scheduled Tasks

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Review the scheduled task to see what was run and when it was run. Set up the same task on the new server, making sure the components required for the task (programs, configuration files) are copied over.

## Database Credentials

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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.

## Testing the new Server

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Stop the SQL Server Service on 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 the SQL Server jobs or Scheduled Tasks to be sure they are working properly.

## SQL Server Jobs or Scheduled Tasks

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

## Resolving Connection Errors

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For SQL Server does not exist or access is denied errors, check to ensure the following is configured.

- SQL Service is running under admin acct.
- TCP/IP is enabled (SQL Server Network Configuration – Protocols).
- To test outside of halFILE, use ODBCAD32.exe.

## SQL Default Installs

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The default install of SQL does not use Named Instances. The following can be used to resolve issues with the default install:

- It is likely the Windows Firewall is blocking the SQL Server port (default 1433).
- You can obtain “opnsqlserverports.bat” from halFILE Support.
- Run it at an elevated command prompt (run as administrator) on the server. This will open all ports involved with SQL Server applications.

## SQL Named Instance Installs

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If SQL was installed as a named instance (example: "Server\halfile" for the SQL Server name) the following may resolve the issue:

- By default the Named Instance is set to dynamic ports. If halfILE is the only instance of SQL on this server, then you can change it from dynamic ports to static port 1433 (SQL Server Network Configuration – Protocols – TCP/IP - IP Addresses), restart SQL, and then run opensqlserverports.bat as described above.
- If you need to keep it as dynamic port, then:
  - Make sure the SQL Browser Service is started.
  - Allow sqlserver.exe through Windows Firewall as exception. On the Exceptions tab of the Windows Firewall item in Control Panel, click Add a program. Browse to the location of the instance of SQL Server that you want to allow through the firewall, for example C:\Program Files\Microsoft SQL Server\MSSQL12.<instance\_name>\MSSQL\Binn, select sqlservr.exe. Then click Open. Click OK.