halFILE Server Move

Contents

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 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 have an old version of SQL prior to SQL 2008R2 and are moving to a newer version of SQL then you may not be able to attach and must use hfRestore.exe and flat file backups output by hfBackup.exe

Moving the halFILE Application (halFILE 4.1)

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.

You should also install other supporting applications including Crystal Reports.

Note: *If you are running halFILE 3.x or earlier please contact technical support for the server move. You should not attempt to install halFILE 3.x components on newer server hardware.*

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.

Note: *The Image Store can be very large so you may want to copy it several days prior to the actual server move and then use robocopy to sync any new/changed files on the day of the move.*

Basket Images

1. Change basket path locations by updating the QueueLocation field in the HFWParams.Queues table to reflect the new server location.

    Update queues set queuelocation = replace(queuelocation,'\\oldserver\oldshare\halfile\','\\newserver\newshare\halfile\')

    Alternatively you could update the location of each basket 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 5 (for 5 MB).
3. If the database security user id or password was changed then update the Database User ID ad 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. 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.

Important: Once testing is complete the old shares and database server should be disabled. Ideally SQL databases would be completely detached and shares disabled so there is no chance of a user modifying information on the old server potentially causing data and images to be out of sync.

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.

If reports are still not working then you may need to open each report in Crystal 9 designer or higher, set the DSN locations, and verify 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 the program HFBackup.exe. If the old server was configured to use sp_hfwbackup please contact technical support for upgrading to hfBackup.

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.

Print To halFILE Under Terminal Services

If your 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.