



Docusnap Migration

Migrate Docusnap / Database to a new server

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1. Introduction

This HowTo describes how to migrate the Docusnap database to a new SQL server. This may be necessary if, for example, you want to migrate from an SQL Express instance to a full SQL Server instance.

Furthermore, the preparations, execution as well as the post-processing for the migration of the Docusnap server are described.

Since the Docusnap database may be available on the same system as the Docusnap Server, the migration should start with moving the database.

2. Summary

Migration of the Docusnap database

- Create a backup of the Docusnap database
- Move the .bak file to the new SQL server
- Restore the database to the new SQL server
- Adjust the compatibility level of the database to the possibly new version
- Set up the permissions to access the database / SQL server
- In Docusnap, customize the database connections for client and server
- Set up regular database backup

Migrate the Docusnap server:

- Exit the Docusnap Server
- Backup the Docusnap paths
- Install and configure Docusnap on the new server
- Restore the Docusnap paths
- Cleaning up the Discovery Services
- Editing the scheduled jobs

3. Migration of the Docusnap database

3.1 Backup of the Docusnap database

For the migration of the Docusnap database, we recommend performing a backup of the productive database and restoring this backup to the new SQL server afterwards.

Please note that the database can only be restored on a SQL server that has at least the same SQL server version:

- Migration from SQL Server 2016 to 2016 or higher is possible.
- Migration from SQL Server 2019 to 2016 or lower is NOT possible!

Microsoft SQL Management Studio is required to create the backup.

In SQL Management Studio select your Docusnap database - right click - Tasks – Back Up.

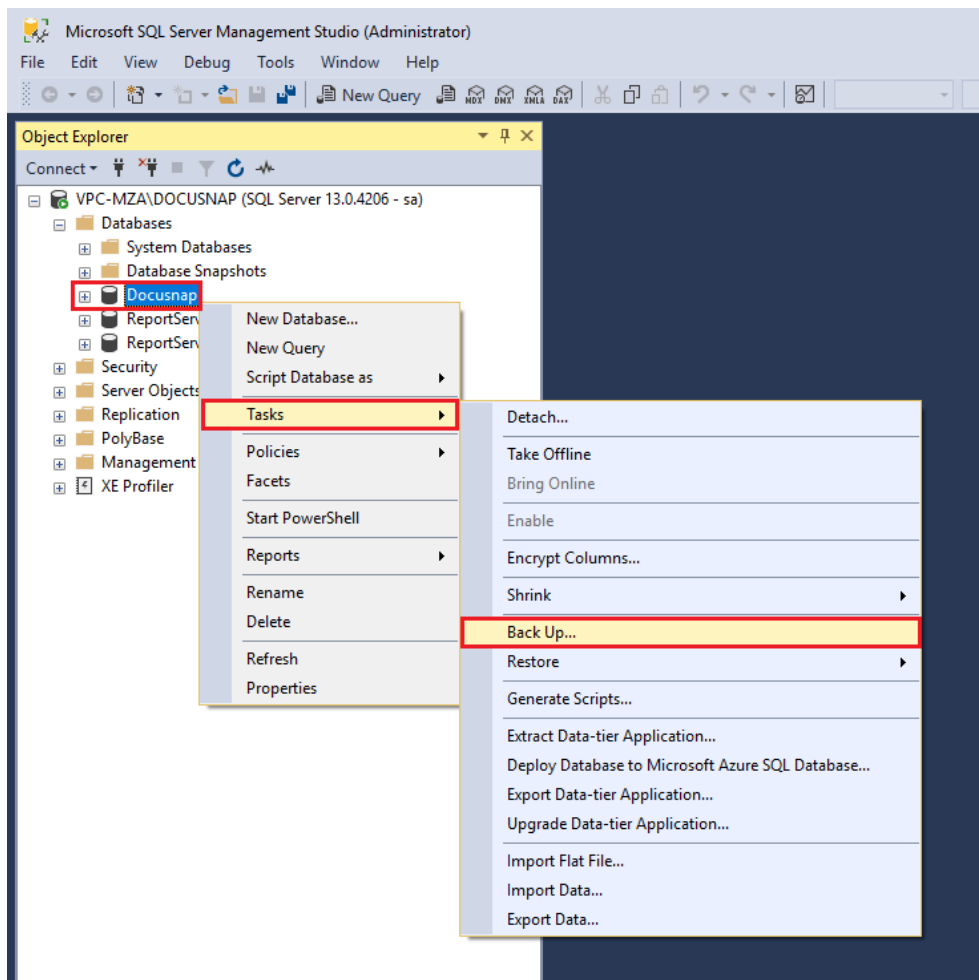


Fig. 1 - Start Database Backup Wizard

In the Database Back Up Wizard, your Docusnap database is displayed below Source. Select the backup type Full.

Select Disk as the destination and you can specify the backup path via Add. Please make sure that you specify the file name with the file extension .bak, otherwise the backup will not appear during the restore.

If you already see a backup path below the destination, you can either use it again or remove it first.

With a click on OK the backup will be executed. The backup file of the database must now be made available on the new SQL server.

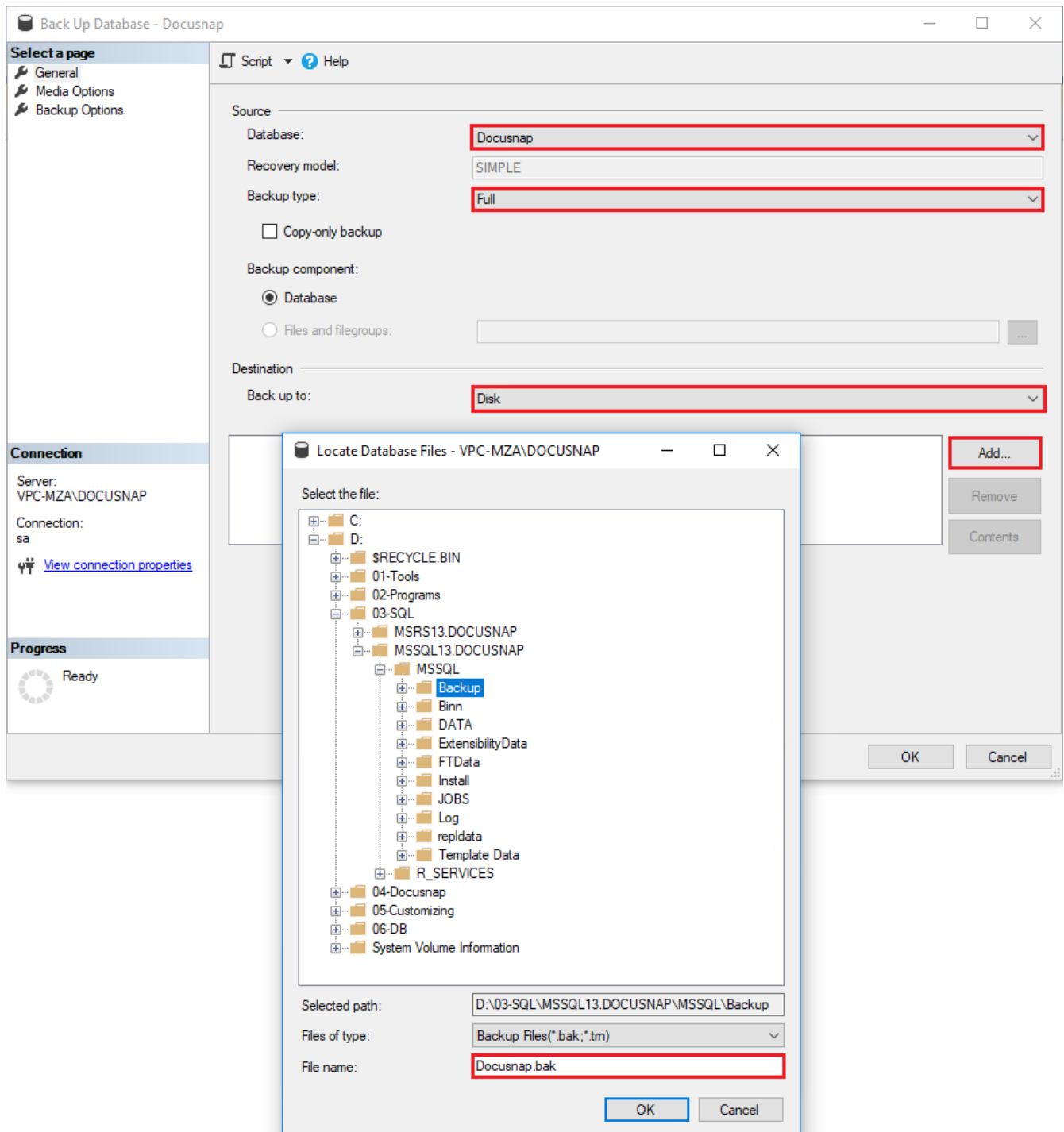


Fig. 2 - Prepare Database backup

3.2 Restoring the Docusnap database

Microsoft SQL-Management Studio is also used to restore the database.

In SQL-Management Studio, select **Databases** - Right click - **Restore Database**.

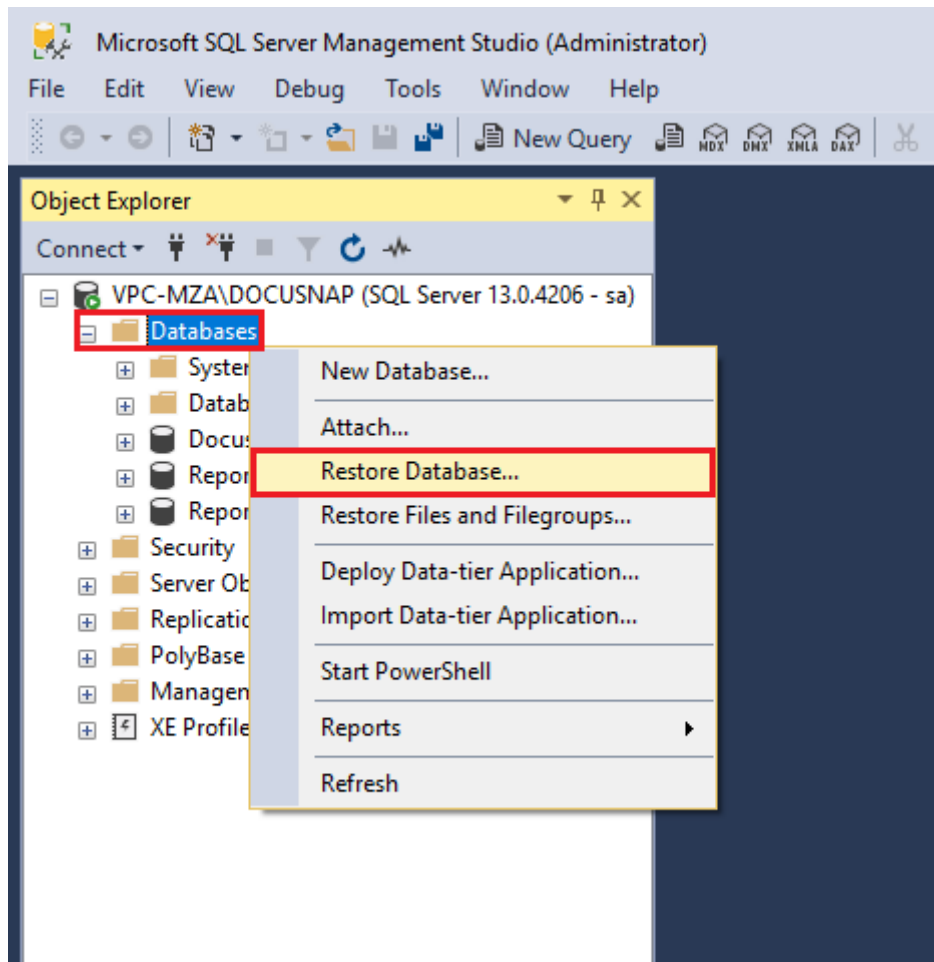


Fig. 3 – Start Restore Database Wizard

In the wizard, select the source medium and then you can select the .bak file and restore the backup.

If there are any problems with the restore, run the Management Studio as an administrator.

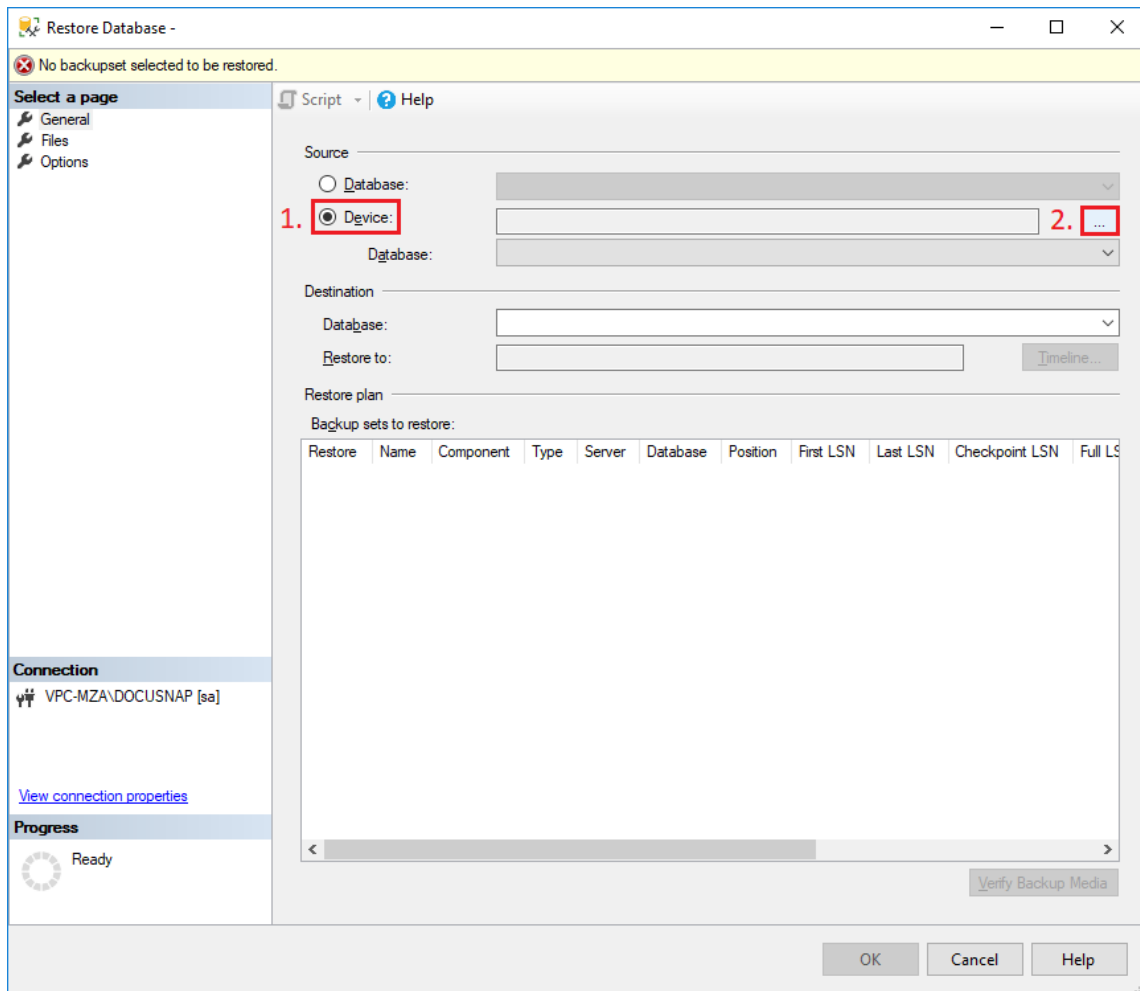


Fig. 4 - Restoring the database

3.3 Adjusting the compatibility level

If the database has been migrated to a more recent SQL server than was previously in use, you should also upgrade the compatibility level of the database.

In SQL Management Studio, select the Docusnap database - right-click - Properties - Options - Compatibility level.

3.4 Granting permissions to the database

After the backup has been restored to the new SQL server, access must be set up again. Please note that you must grant db_owner permissions to the accessing SQL or Windows users to run Docusnap.

For more information on granting permissions to the Docusnap database, please refer to [HowTo Installation and Configuration](#) - Chapter 5.2.3.

3.5 Adjusting the database connection in Docusnap

The final step is to adjust the database connections for client and server.

Open the options (cogwheel) - General - Database via the title bar and store the new data for the Docusnap client(s).

To adjust the database connection of the server, switch to the Docusnap server configuration (title bar - Docusnap icon). In step 2 you can store the new data.

If the Windows service is running with the Local system account and the database is configured with Windows authentication - the service cannot be started, because no connection to the database can be established.

In this case, SQL Server authentication must be used.

Furthermore, you can authorize the local system account to the database if the Docusnap Server and SQL Server are available on the same system.

4. Migration of the Docusnap Server

4.1 Stopping Docusnap Server Service

In the first step the Docusnap server (Windows service) and the Docusnap client (application) are terminated on the server. To stop the Docusnap server, navigate to the title bar - Discovery Services - Server Status and stop the service.

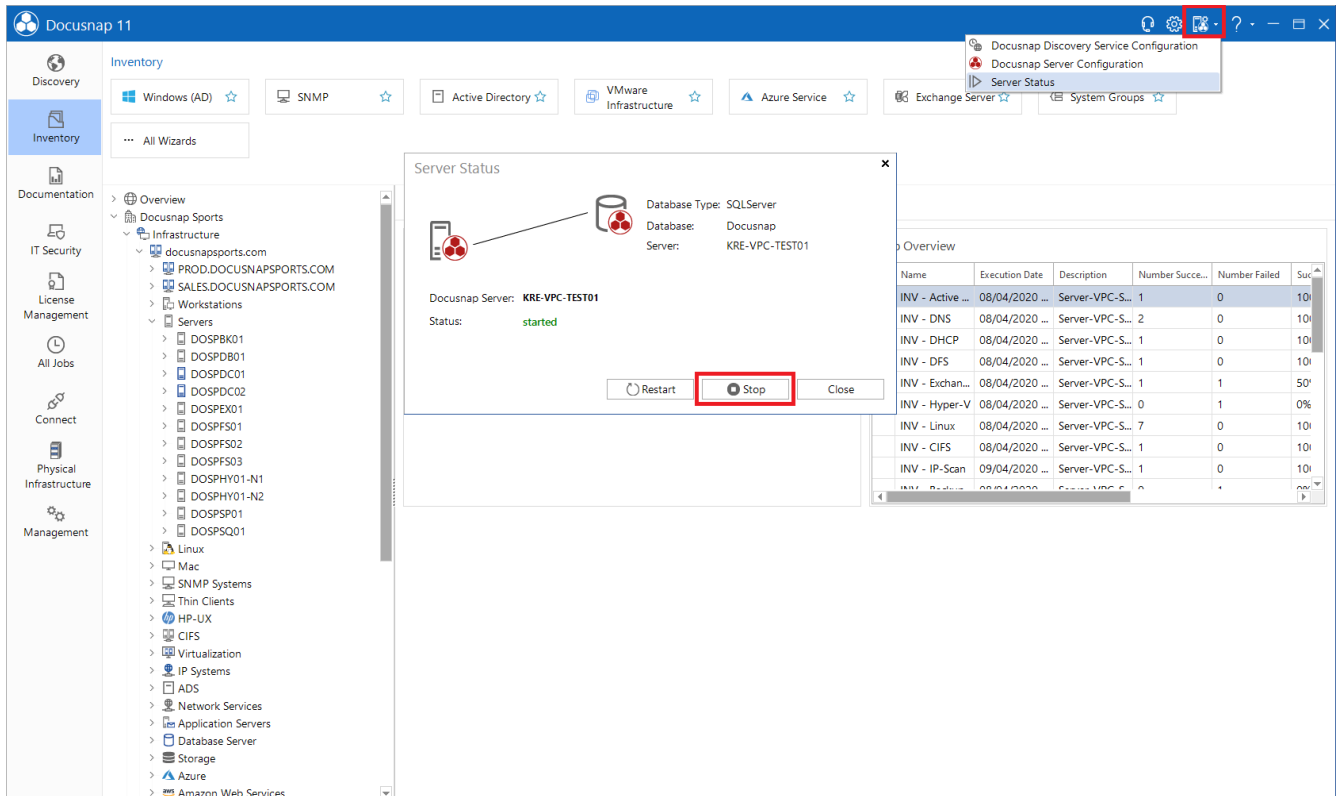


Fig. 5 - Stop Docusnap Server

4.2 Backup of Docusnap paths

The system paths were defined after Docusnap was installed. These include the following paths:

- Local settings
- Team settings
- Checkout path
- Documentation path
- Encryption module

The configured paths can be found in the

- Settings - General - System paths
- Settings - General - Databases - Encryption module
- Settings – Documentation

You can open the settings in the title bar - Settings (gear wheel).

Copy all folders from the above paths to the new Docusnap server or another central share. If necessary, you may still need to create a share for these folders.

If the paths are set to a central share that is still available after the server move, you do not need to move the data, but can enter the existing paths on the new Docusnap server.

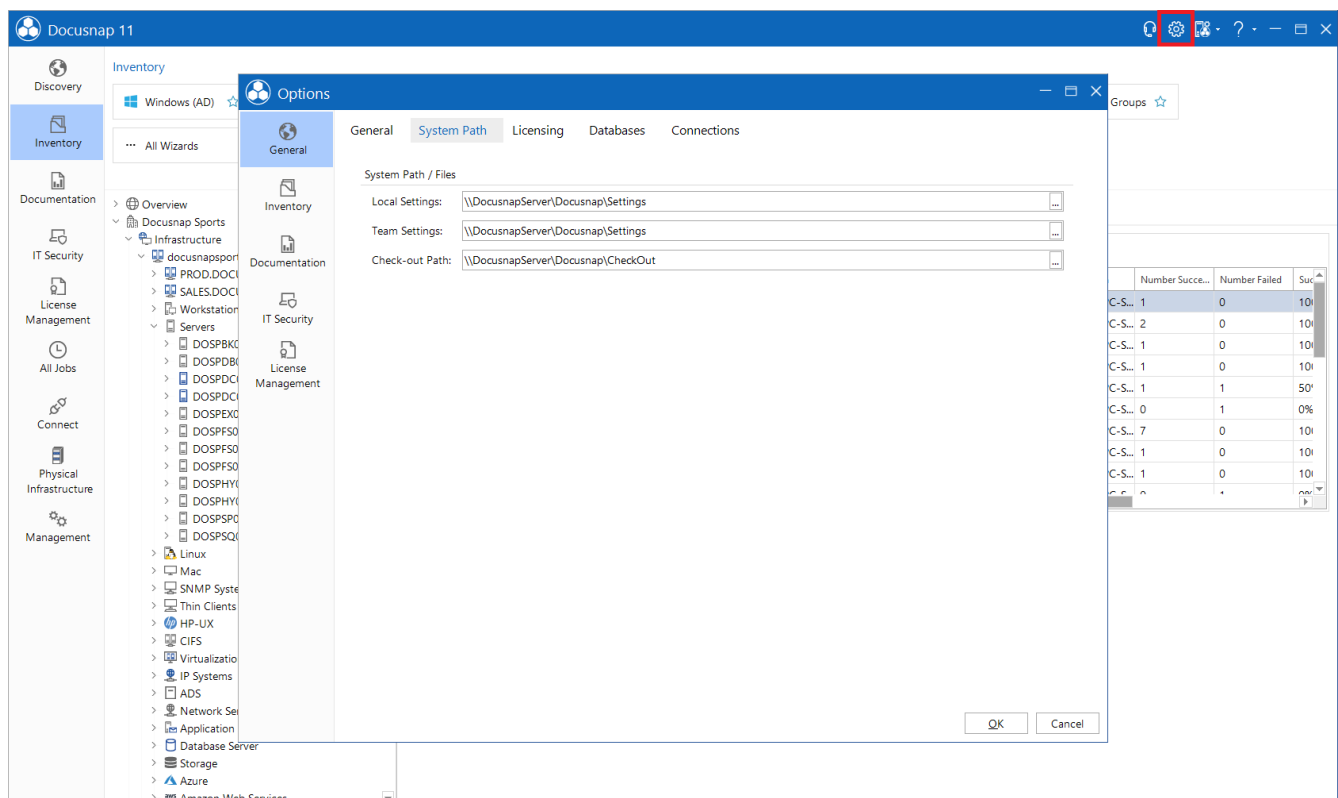
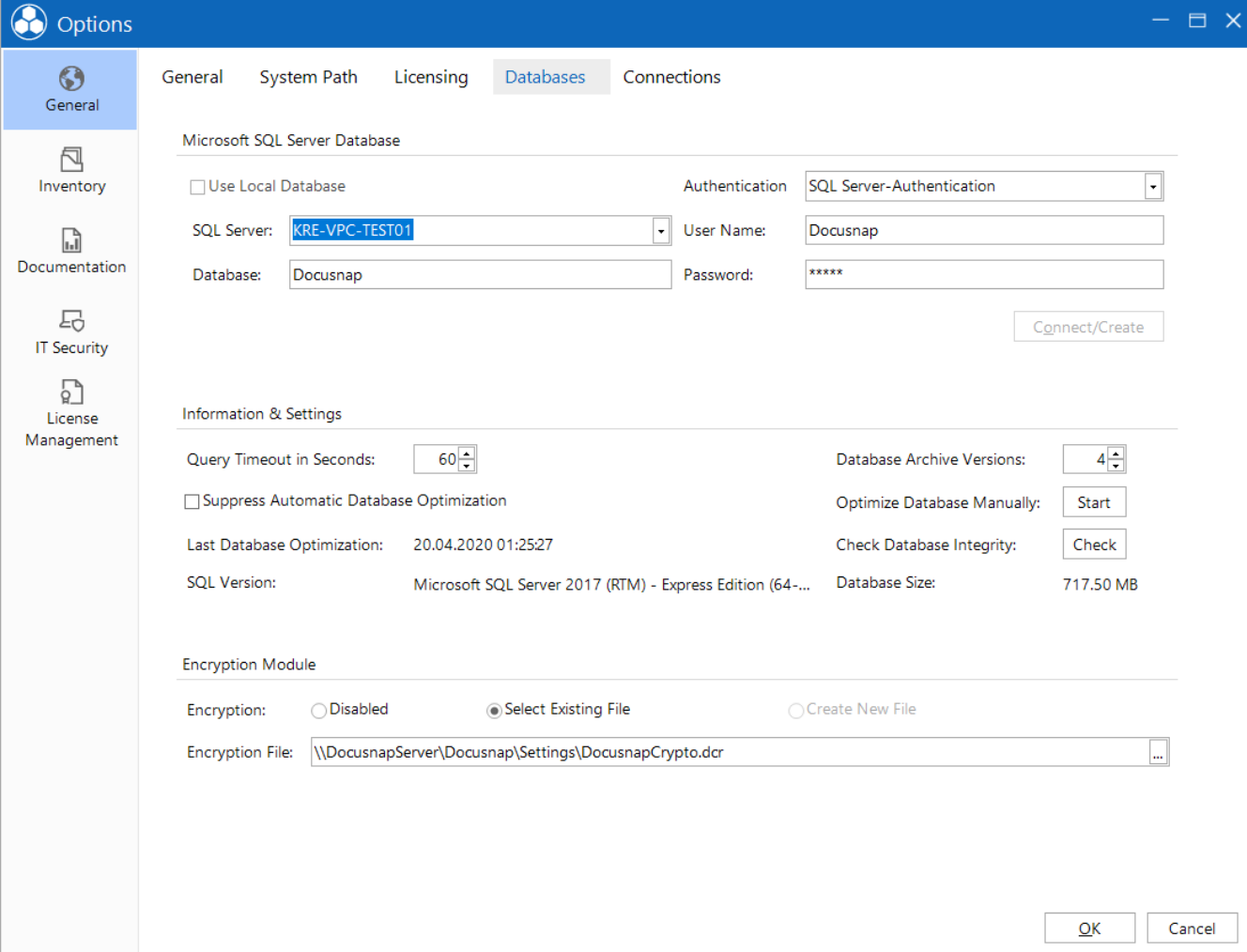


Fig. 6 - System paths



Options

General System Path Licensing **Databases** Connections

Microsoft SQL Server Database

☐ Use Local Database Authentication: SQL Server-Authentication

SQL Server: KRE-VPC-TEST01 User Name: Docusnap

Database: Docusnap Password: *****

Connect/Create

Information & Settings

Query Timeout in Seconds: 60 Database Archive Versions: 4

☐ Suppress Automatic Database Optimization Optimize Database Manually: Start

Last Database Optimization: 20.04.2020 01:25:27 Check Database Integrity: Check

SQL Version: Microsoft SQL Server 2017 (RTM) - Express Edition (64-... Database Size: 717.50 MB

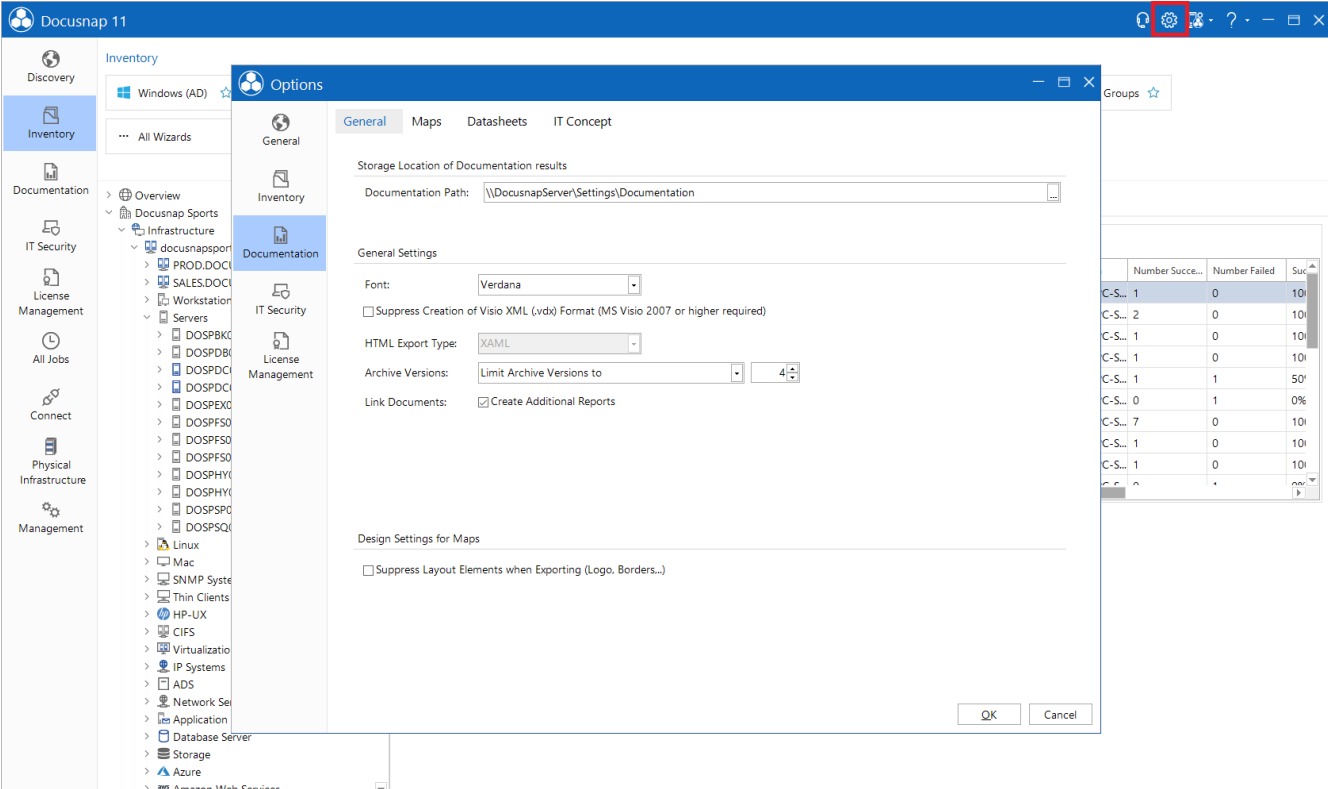
Encryption Module

Encryption: ☐ Disabled ☒ Select Existing File ☐ Create New File

Encryption File: \\DocusnapServer\Docusnap\Settings\DocusnapCrypto.dcr

OK Cancel

Fig. 7 - Crypto key path



Docusnap 11

Inventory

Discovery

Inventory

Documentation

IT Security

License Management

All Jobs

Connect

Physical Infrastructure

Management

Overview

Docusnap Sports

Infrastructure

docusnapports

PROD.DOC

SALES.DOC

Workstation

Servers

DOSPBC

DOSPDB

DOSPDCC

DOSPEXC

DOSPFX

DOSPFS0

DOSPFS1

DOSPFS2

DOSPFS3

DOSPFS4

DOSPFS5

DOSPFS6

DOSPFS7

DOSPFS8

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4.3 Installation of Docusnap

You can install Docusnap with the help of the [HowTo Installation and Configuration](#).

5. Follow-up work

5.1 Cleanup of Discovery Services

OPTIONAL

If you are working with a new database, this step is not necessary because there are no old entries in the database.

After you have installed and configured Docusnap on the new server, the Discovery Service of the old Docusnap server must be deleted.

You can display all Discovery Services in the title bar - Discovery Services - Docusnap Discovery Service Configuration.

Activate the option: Show disabled Discovery Services

Select the old Server Discovery and Delete it.

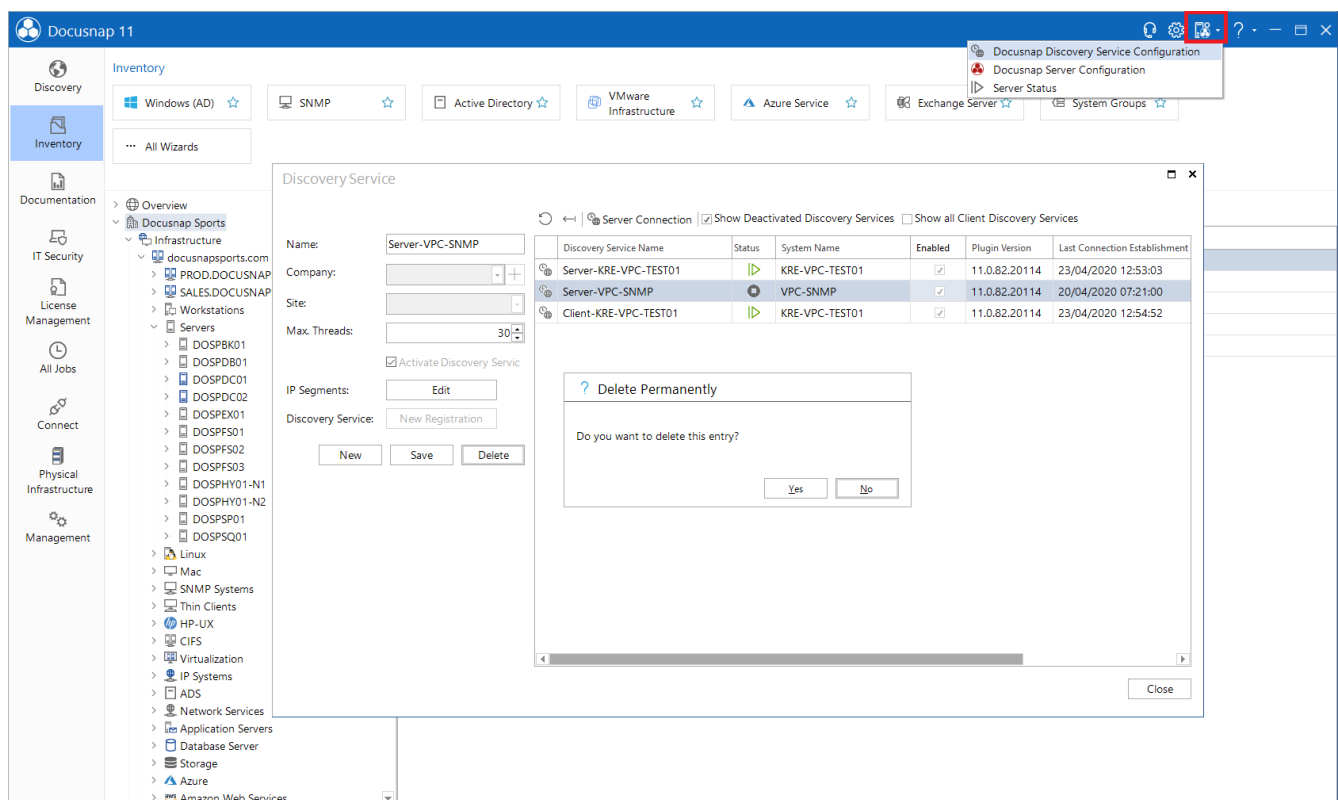
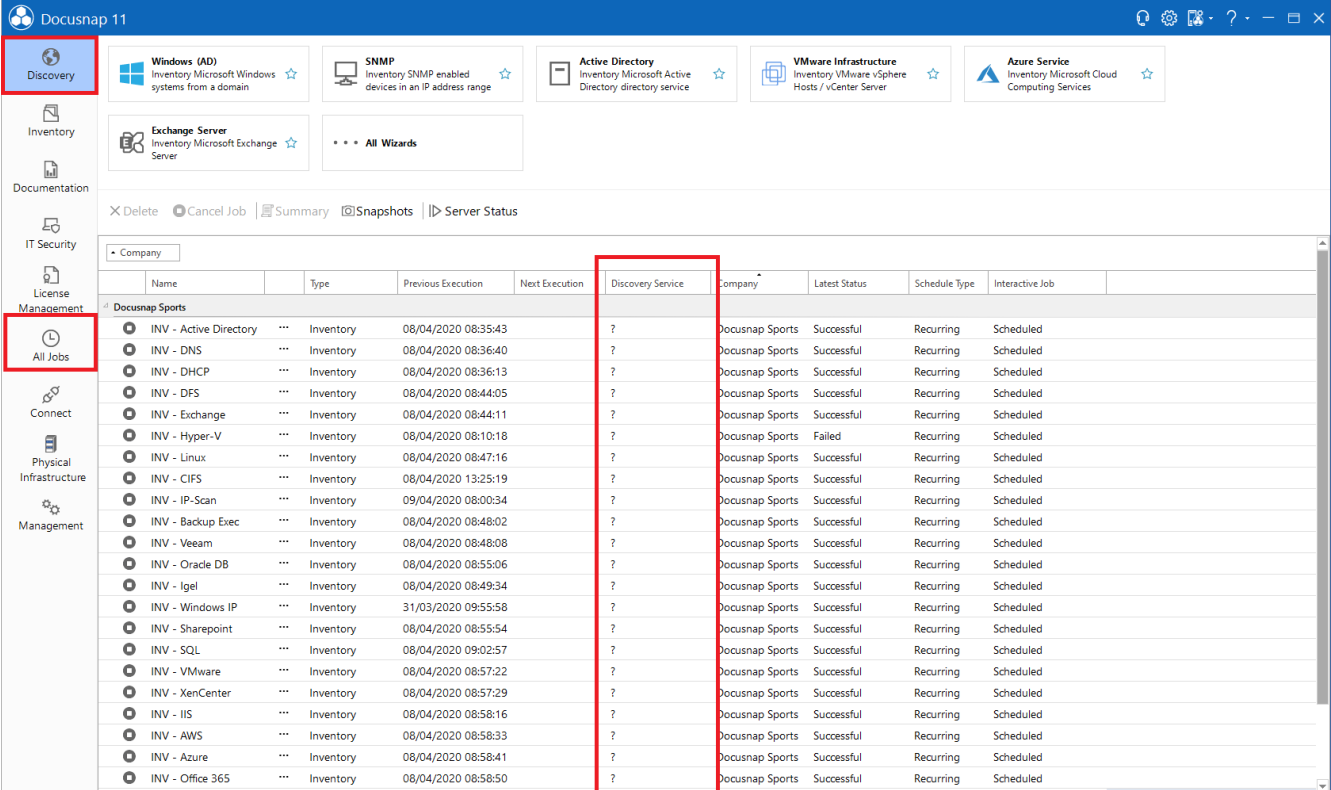


Fig. 9 - Show all Discovery Services

5.2 Editing the scheduled jobs

Due to the move of the Docusnap Server the planned orders must be converted to the new Docusnap Server. The scheduled jobs can be found in the navigation bar - **Discovery / All Jobs**.

The jobs for which the old Docusnap server was stored as Discovery Service are no longer functional. The assignment to the Discovery Service is missing, as this is no longer available. Start processing the planned order and select the new discovery service in step 2.



Name	Type	Previous Execution	Next Execution	Discovery Service	Company	Latest Status	Schedule Type	Interactive Job
INV - Active Directory	Inventory	08/04/2020 08:35:43		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - DNS	Inventory	08/04/2020 08:36:40		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - DHCP	Inventory	08/04/2020 08:36:13		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - DFS	Inventory	08/04/2020 08:44:05		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - Exchange	Inventory	08/04/2020 08:44:11		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - Hyper-V	Inventory	08/04/2020 08:10:18		?	Docusnap Sports	Failed	Recurring	Scheduled
INV - Linux	Inventory	08/04/2020 08:47:16		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - CIFS	Inventory	08/04/2020 13:25:19		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - IP-Scan	Inventory	09/04/2020 08:00:34		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - Backup Exec	Inventory	08/04/2020 08:48:02		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - Veeam	Inventory	08/04/2020 08:48:08		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - Oracle DB	Inventory	08/04/2020 08:55:06		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - Igel	Inventory	08/04/2020 08:49:34		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - Windows IP	Inventory	31/03/2020 09:55:58		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - Sharepoint	Inventory	08/04/2020 08:55:54		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - SQL	Inventory	08/04/2020 09:02:57		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - VMware	Inventory	08/04/2020 08:57:22		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - XenCenter	Inventory	08/04/2020 08:57:29		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - IIS	Inventory	08/04/2020 08:58:16		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - AWS	Inventory	08/04/2020 08:58:33		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - Azure	Inventory	08/04/2020 08:58:41		?	Docusnap Sports	Successful	Recurring	Scheduled
INV - Office 365	Inventory	08/04/2020 08:58:50		?	Docusnap Sports	Successful	Recurring	Scheduled

Fig. 10 - Job Management

5.3 Functionality test

The Docusnap Server migration is now complete.

Nevertheless, we ask you to check the completeness and functionality of the new Docusnap instance.

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VERSIONSHISTORIE

Date	Description
October 26, 2018	Version 1.0 – Document created
April 23, 2020	Version 2.0 - Revision of the HowTos for Docusnap 11
August 06, 2021	Version 2.1 - Adjustments made to the chapter Migration of the database
Junde 20, 2022	Version 2.2 – Added Chapter Adjusting the compatibility level

