Docusnap Migration

Migrate Docusnap / Database to a new server

TITLE	Docusnap Migration
AUTHOR	Docusnap Consulting
DATE	1/11/2023
VERSION	2.2 | valid as of June 20, 2022

This document contains proprietary information and may not be reproduced in any form or parts whatsoever, nor may be used by or its contents divulged to third parties without written permission of Docusnap GmbH. All rights reserved.

CONTENTS

1. Introduction 4
2. Summary 4
3. Migration of the Docusnap database 5
3.1 Backup of the Docusnap database 5
3.2 Restoring the Docusnap database 5
3.3 Adjusting the compatibility level 6
3.4 Granting permissions to the database 6
3.5 Adjusting the database connection in Docusnap 6
4. Migration of the Docusnap Server 7
4.1 Stopping Docusnap Server Service 7
4.2 Backup of Docusnap paths 7
4.3 Installation of Docusnap 7
5. Follow-up work 8
5.1 Cleanup of Discovery Services 8
5.2 Editing the scheduled jobs 8
5.3 Functionality test 8

 | ©2023 Docusnap – All rights reserved

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

 | ©2023 Docusnap – All rights reserved

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

- Docusnap database - right click - Tasks – Back Up.

In the database backup wizard, select

- *Database*: Your Docusnap database
- *Backup type*: Full
- *Backup to*: Disk
- *Add*: Choose a storage path for the backup file

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.

In the Database Recovery Wizard select the

- General
  - *Medium*: storage path to the saved .bak file
- Files
  - Check here the storage of the database and log file.

If there are any problems with the recovery, it may help to run the Management Studio as an administrator.

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

- 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

As a final step, the database connections for client and server are adjusted.

- Options (title bar - cogwheel) - General - Database

To customize the database connection of the server, switch to the Docusnap Server configuration

- General (title bar - Docusnap icon) - Docusnap Server Configuration - Step 2 - Server Database

If the Windows service is running with the local system account and the database is connected via 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.

 | ©2023 Docusnap – All rights reserved

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:

- General (title bar - Docusnap icon) – Server Status – Stop

Alternatively, you can also stop the service within Windows Services.

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

- Options (title bar cogwheel) - General - System Path
- Options (title bar cogwheel) - General - Database
- Options (title bar cogwheel) - Documentation - System Path

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.

4.3 Installation of Docusnap

You can install Docusnap with the help of the HowTo Installation and Configuration.

 | ©2023 Docusnap – All rights reserved

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.

- General (title bar - Docusnap Icon) - Discovery Services - Docusnap Discovery Service Configuration

Activate the option: **Show disabled Discovery Services**

Select the old Server Discovery and **Delete** it.

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 where the old Docusnap Server was deposited as Discovery Service are now no longer functional. A "?" is displayed in the Discovery Service column. The assignment to the Discovery Service is missing because it no longer exists. Start editing the scheduled job and select the new Sever Discovery in step 2.

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.

VERSIONSHISTORIE

Date	Description
October 26, 2018	Version 1.0 – Document created
April 23, 2020	Version 2.0 - Revision of the HowTo for Docusnap 11
August 06, 2021	Version 2.1 - Adjustments made to the chapter Migration of the database
June 20, 2022	Version 2.2 – Added Chapter Adjusting the compatibility level
December 03, 2023	Version 3 – Revision of the HowTo for Docusnap 12

© Docusnap GmbH - www.docusnap.com