infoRouter V7 application migration Guide.

I f for any reason, you wish to move the entire infoRouter installation to another machine, please follow the instructions below in the order in which they are explained. This guide assumes that you intend to move the IIS application content of infoRouter. If your intent is to switch installation modes (Simple versus Distributed), please refer to the appropriate documentation on how to switch installation models.

It is critical that you pay close attention to the details. You must read this document in full before attempting the migration. Sections explained towards the end of this guide may determine or change your plans.

Step-by-step Migration

1) READ THE REQUIREMENTS DOCUMENT

Review the Server & Client Requirements document (InfoRouter V7 - Requirements.pdf) located in the original installation path to make sure that you have allocated resources that meet the minimum requirements for best performance on the new server on which infoRouter is to be migrated.

Make sure to have the .NET framework installed and install the latest patches. For more on this topic, please review the Requirements document
(InfoRouter V7 - Requirements.pdf).

2) DO NOT TRY TO CHANGE THE INSTALLATION MODEL DURING THE MIGRATION.

If you have installed infoRouter in the Single server mode, do not change this model until a successful migration is complete. You will be able to change modes once you have successfully migrated infoRouter.

3) LOCATE YOUR ORIGINAL INSTALLATION SOFTWARE.

You must have the original installation software on hand before you an perform the migration. You will need to have this original installation server on the target server.

4) PERFORM A LIVE UPDATE ON THE ORIGINAL INSTALLATION.

Perform a Live Update on your existing (running) copy of infoRouter prior to the migration. This will ensure that you have all the latest patches and upgrades to the original software.

5) PLAN FOR THE MIGRATION

It is perhaps best to perform the migration at a time when access to infoRouter is at a minimum. Weekends or after hours is probably the best choice to minimize the impact on users.

6) STOP IIS

To stop access to the infoRouter application, please stop the IIS Server.
To do this, perform the following:

- Click on the Start Button
- Select the RUN menu item.
- Enter the following command:
     iisreset /stop

7) RECORD SPECIAL SETTINGS

If you installed infoRouter using the Simple Model (you have your entire warehouse on one server, IIS is on the same server and the DB is also on the same server), record the path used. (C:\infoRouter\WH or other path)

If you installed infoRouter using the Distributed Model (you have your warehouse on another server other than the IIS machine), record the path(s) used. You must have either used a UNC path such as //<Server Name>/<drive name>/<directory name> or used a mapped drive(s). In either case, make a careful and complete list of machines, drives and directories. You will need this information after installing infoRouter on to the new server.

8) BACKUP THE WAREHOUSE

Perform a complete backup of your warehouse(s). Please make sure that you have a complete backup set of all warehouse folders comparing your backups to the list you prepared in Step 7.

9) BACKUP THE DATABASE

Perform a complete database backup of your database.
Please refer to the specific backup instructions of your DBMS and make sure that you can restore a copy of your backup in the target server.

If you installed infoRouter using the Distributed Model and your DBMS is already on another server and you wish to keep your configuration the same, you may skip this step.

Note: We always recommend making backups of everything before a migration.

10) INSTALL INFOROUTER ON THE NEW SERVER.

Before installing infoRouter on the new server, please refer to the infoRouter implementation Guide.

Install infoRouter on the new server using the original installation programs. Select installation defaults when installing the new instance of infoRouter.

Important note:
Make sure to enter a fake database name (such as XYZ) when prompted for a database name. Let the installation create/update this fake database. Remember, you already have a database that you will restore from so this one is just to fool the installation program.

11) RESTORE YOUR DATABASE

If you installed infoRouter using the Distributed Model (originally) and the SQL Server or Oracle server was on a different server and you wish to keep it that way. Skip this step.

Using the backup performed in Step 9 of this guide, restore the infoRouter database over the one created in the installation step (Step 10) or simply restore your DB backup and delete the database created during the installation (Step 10)

12) RUN LIVE UPDATE

Now that you have a working copy of infoRouter on the new server, you must run Live Update. This will ensure that you have all the latest patches and upgrades to the original software. It will also ensure that you have the same exact version of the software as your original installation.

Original installation model is Simple:

If you installed infoRouter using the Simple Model, restore your warehouse on to the new server.

Note: You must restore your warehouse to the same path as your original installation. Warehouse paths are recorded in the database so infoRouter will expect to find your warehouse in the same location. If you decide to restore it to another location, infoRouter will not be able to access your warehouse.

Original installation model is Distributed:

If you installed infoRouter using the Distributed Model and your warehouse is located on a server or servers other than the IIS Server, skip the restore operation. However, there are other settings you need to verify, so keep reading this section.

Using the notes you recorded in Step 7 of this guide, make sure that the warehouse paths are reachable from the new server.

If you used UNC paths and the new server can reach those paths in distributed mode, this step is complete.

If you used mapped drives, you must create the same mapped drives on the new server.

Moving the warehouse to a new or other location:

In the Simple installation mode migration, you must change the warehouse location. To do this, you must use the "Warehouse Configuration Tool" to physically move the warehouse to the new location (recommended approach)

Or, if you wish to simply copy the warehouse to its new location manually, you will have to trick the database and update its warehouse entries to point to the new location.

To do this, using a tool of your choice, connect to the infoRouter database and fire the following query.

Example:

The original warehouse location is "C:\inforouter\WH"
The desired warehouse location is "E:\WH"

UPDATE WAREHOUSEPATHS SET PATH = "E:\WH" WHERE PATH =
"C:\INFOROUTER\WH"

14) CREATE THE INDEX SERVER CATALOG.

If you changed the location of the warehouse as a part of the migration, you must re-configure the MS Index server catalog to point to the new location of the warehouse(s).

Follow the instructions in the installation guide to create a MS Index Server catalog These instructions will help you create a new MS Index Server catalog used in content searches or otherwise known as Full-text-indexing.

15) SETUP SMTP ON THE NEW SERVER

Follow the instruction in the implementation guide or the appropriate documentation to setup and configure the SMTP Server on the new server.

16) VERIFY THE MIGRATION

To verify a successful migration, launch your browser and type in the URL for infoRouter.

Verify the following:

- The application appears to be in working condition.

- Performing a search for documents based on content works.

- You are able to download existing documents

- You are able to upload and create new documents

If all of the above is in good working order, Congratulations, you have successfully migrated infoRouter.

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