

infoRouter V8.0 Server Migration Guide.



If 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 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 for the server on which you intend to install the new copy of infoRouter.

<http://www.inforouter.com/downloads/V80/InfoRouter-Requirements-V80.pdf>

You will need to take a look at this document if you intend to install infoRouter on a Windows 2008 server:

<http://www.inforouter.com/downloads/V80/Windows-2008-Standard-Edition-Required-Features.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 perform the migration. Please contact the infoRouter Technical Support department to get the original installation software.

4) RUN LIVE UPDATE ON THE ORIGINAL INSTALLATION.

Run 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

Weekends or after hours is probably the best choice to minimize the impact on users. Do not try the migration when users are attempting to access infoRouter.

6) 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 used a UNC path such as //<Server Name>/<drive name>/<directory name>.

Make a careful and complete list of machines, drives and directories. You will need this information after installing infoRouter on to the new server. Do not remove/un-install or change the original infoRouter installation until after you have verified the migration process.

7) 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`
-

Stopping IIS is critical. This will prevent all access to the infoRouter application. You must make sure that the database and the warehouse are not being accessed while the backups are being performed.

PERFORM ALL REQUIRED BACKUPS

Backups for the infoRouter database and warehouse must be performed while infoRouter is NOT running and the DB-Warehouse pairs must match.

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 6.

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) BACKUP SECTIONS OF THE APPLICATION DIRECTORY

In addition to the database and warehouse, the application directory is used to record special settings and user data so these must be backed up as well.

Copy the following directories from the original infoRouter application directory:

InfoRouter/Categories

The categories directory contains the “saved search” screens you have created.

InfoRouter/Logs

The logs directory contains the audit logs for various actions performed within infoRouter.

InfoRouter/Portals

The portal directory contains the portals created and edited within infoRouter.

InfoRouter/SearchPages

The SearchPages directory contains a list of custom search screens created within infoRouter.

11) 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. Try to select installation defaults when installing the new instance of infoRouter.

Please refer to the infoRouter Implementation Guide to make sure you follow all the required steps. For version 8.x of infoRouter, the implementation guide can be found here: [Version 8 Implementation Guide](#)

Important notes:

Database Name & Server selection during the installation:

At one point of the installation you will be prompted for a database server and name. Make sure to enter a fake database name such as XYZ or DUMMY.

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.

Warehouse location selection during the installation:

If you intend to store the warehouse on this same server, make sure to choose a drive letter that has enough storage capacity to house the warehouse you are about to restore.

If the warehouse is on a network location and you would like to continue to use this same location, specify a local disk location on this server. This location will be changed after the installation is complete.

12) RESTORE YOUR DATABASE & ADJUST SETTINGS

If you installed infoRouter using the Distributed Model (originally) and the database was on a different server and you wish to keep it that way. Skip the restore process but you must still make one adjustment.

If the infoRouter database is also moving as a part of the migration, restore the database using the backup performed in Step 9 of this guide. Restore the infoRouter database over the one created in the installation step (Step 11) or simply restore from your DB backup and delete the database created during the installation (Step 11).

After the restore operation you must make one additional adjustment to point infoRouter to the correct database server and database name. Remember that you entered a fake database name; this must be corrected.

Perform the following:

Navigate to the infoRouter installation path and edit the file called IRWEB.DSN. This file stores the database connection information. When edited with Notepad, the contents should look similar to the following:

```
[ODBC]
DRIVER=MYSQL
UID=root
PASSWORD=/Crypto:nZBf69bCJIM=
STMT=
OPTION=3
PORT=3308
SERVER=infoRouterDBServer
DB=DUMMY
DESC=
```

The example above is for a MySQL database. This file looks slightly different for SQL Server and Oracle.

Edit this file so that the “SERVER”, “DB” and “PASSWORD” information is correct. When you are finished, the file contents should look like the following:

```
[ODBC]
DRIVER=MYSQL
UID=root
PASSWORD=<infoRouter_database_password>
STMT=
OPTION=3
PORT=3308
SERVER= infoRouterDBServer
DB=infoRouter
DESC=
```

Change the database name to infoRouter (or whatever the original production database was called) and make sure to enter the correct password for the restored database.

When infoRouter runs and accesses this file for the first time, the password you entered here in clear-text will be encrypted and will look like the following:

```
[ODBC]
DRIVER=MYSQL
UID=root
PASSWORD=/Crypto:nZBf69bCJIM=
STMT=
OPTION=3
PORT=3308
SERVER=infoRouterDBServer
DB=infoRouter
DESC=
```


13) RESTORE YOUR WAREHOUSE OR ADJUST SETTINGS

Depending on the warehouse location of the original installation, the warehouse must either be moved to the new location or the new infoRouter application must be configured to access the existing warehouse location.

Case 1:

The original warehouse is somewhere on the network and you wish to use the same warehouse

In this case, you do not need to restore the warehouse because it is already in the final location. However, because you chose a fake warehouse location during the installation, this information must be changed so that this new instance of infoRouter knows about the original location of the warehouse on the network.

Perform the following:

Edit the configuration file called warehousepaths.xml located in a directory called “config” in the infoRouter application path.

Be sure to enter the network path in UNC notation for every warehouse path. For more information on how to adjust the warehouse paths and assign appropriate security, refer to this guide:

[Warehouse Migration Guide](#)

Case 2:

The original warehouse is on the original server and you wish to move the warehouse to the new server.

Perform the following:

Simply copy and paste the warehouse over the warehouse location you specified during the setup of infoRouter.

14) CREATE THE INDEX SERVER CATALOG.

If you restored the original warehouse over the new warehouse location on this server, the catalog information is already set correctly and nothing needs to be done.

If the warehouse is on a network drive, the MS Index Server catalog must be configured correctly so that the network warehouse is properly indexed.

Follow the instructions in this guide to properly configure the MS Index Server Catalog: [Creating and Managing the Index Server Catalog](#)

15) RUN LIVE UPDATE ON THE NEW SERVER

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 (production) installation.

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.

17) FINAL STEPS

Be sure to keep DB and Warehouse backups from the original server in a safe place.

Make the required plans to maintain and backup the new infoRouter server.

Update your documentation and instructions so that the new server is backed up and maintained by your IT staff.

Make the required DNS changes so your users can access the new server instead of the old production machine.

To find similar documents, please visit our web site at <http://www.inforouter.com>