

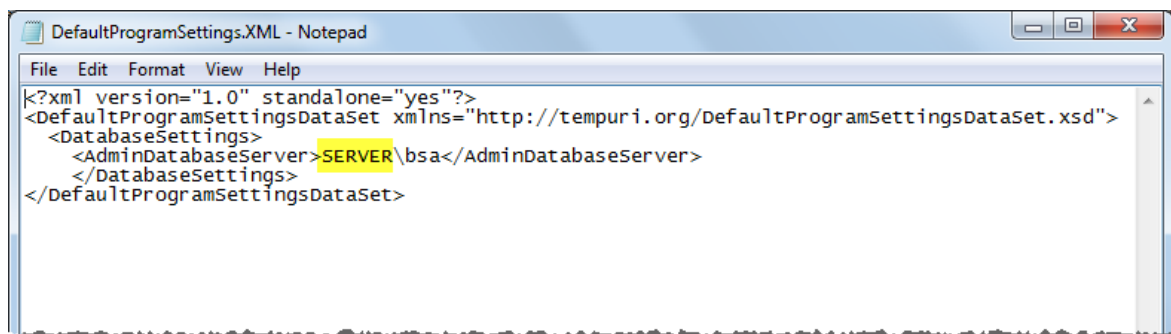
.NET Server Migration Instructions

Questions? Call us at (855) 272-7638 and ask for the I.T. Team, or email itsupport@bsasoftware.com.

Purpose: These instructions are intended to assist IT professionals in moving database and SQL installations from one server to another (i.e., when a new server is purchased to accommodate BS&A's .NET programs).

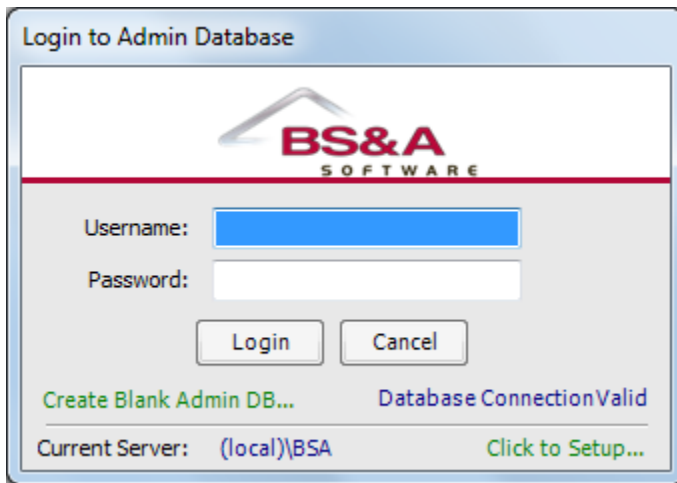
The easiest way to move the databases is to use the BS&A Admin Tool. Please contact our tech department for a copy before beginning these instructions.

1. Install SQL (two options):
 - o Obtain an SQL CD from BS&A Software and install it (instructions can be found here: <http://bsasoftware.com/Learning-Center/Technical-Documents/White-Papers>);
- OR
- o Purchase a version of SQL. If you choose this option, BS&A will need to configure a few settings before it can be used. Please contact our tech department for assistance.
2. To ensure a smooth installation, it is recommended you turn off the User Account Control (if applicable) and the Windows Firewall.
3. Confirm that proper DNS resolution is occurring between all workstations using the .NET programs and the server.
4. Configure the Microsoft Distributed Transaction Coordinator (MSDTC) (instructions can be found here: <http://bsasoftware.com/Learning-Center/Technical-Documents/White-Papers>).
5. Copy the Shared Program Folder from the old server to the new server. The Shared Program Folder is typically named **BSA**, but may be different.
6. After the move, share the folder over the network; folder-level security should also be mirrored from the old server to the new.
7. Configure the DefaultProgramSettings.xml file (used to tell new installations where to look for the correct server) found in the root of the Shared Program Folder:
 - i. While in your Shared Program Folder, right-click **DefaultProgramSettings.xml** and select **Edit**.
 - ii. Replace "server" (where highlighted in the picture) with your server name.

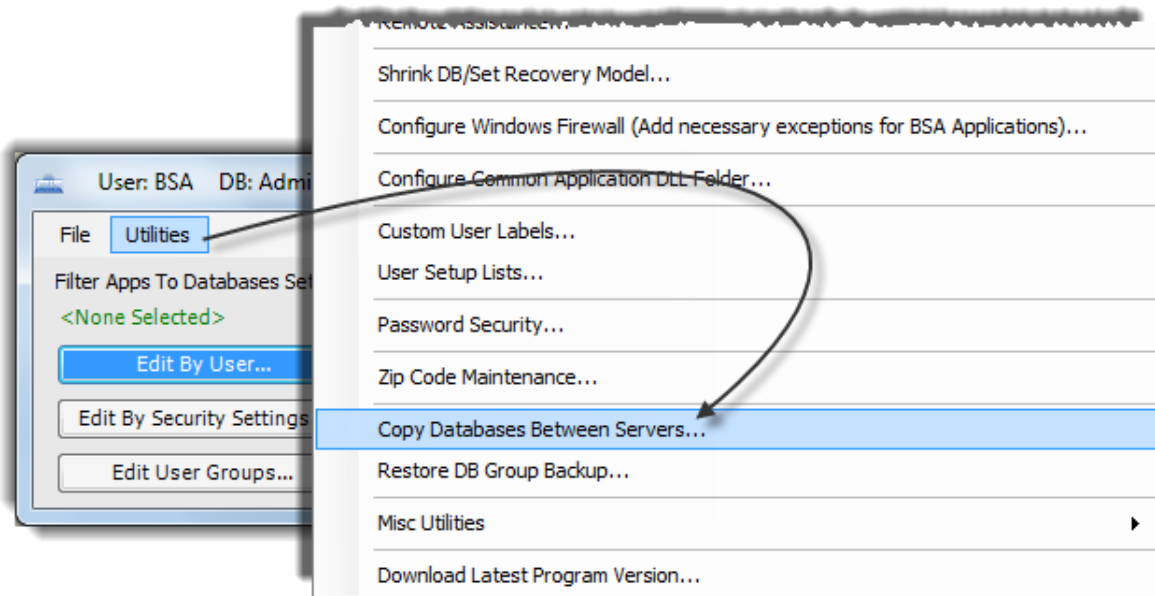


- iii. Exit and save the XML file.
- iv. Right-click **Default Program Settings.XML** and select **Copy**.
- v. Right-click each BS&A program folder and select **Paste**.

8. Up until this point, it was not necessary to have users out of the BS&A program(s). From this step forward, it is extremely important that all users log out of all BS&A programs.
9. From the old server, launch the **BSAdminTool.exe** file. Log in with any Enterprise Administrator-access account:



10. When prompted to make a backup, it is recommended you click **Yes**.
11. When you return to the Admin Tool, click **Utilities**, then **Copy Databases between Servers**:

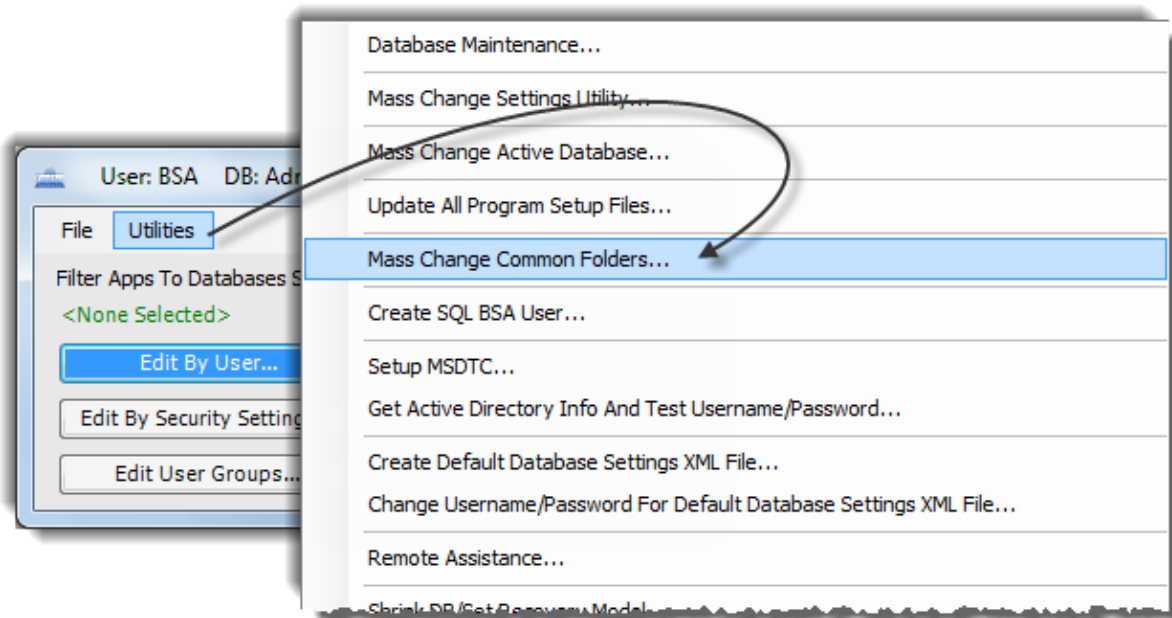


- i. On the right side of the screen, type the name of the server, open the Authentication dropdown and choose **SQL Server Authentication**, click **Use Defaults**, then **Connect**.

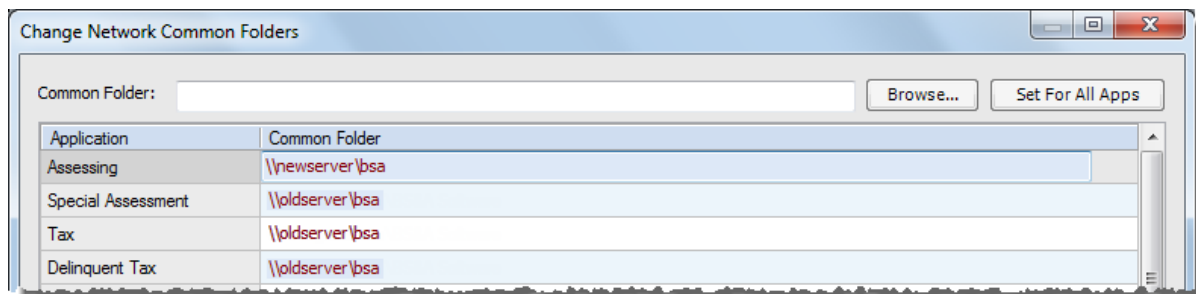
- ii. Once connected, locate one of the **Databases Available** (left side of the screen) and double-click it to move it to the **Databases to Copy** column.

It is recommended that you only move a few databases at a time, depending on the size of the database. Please note: it is not necessary to move the Examples database or any databases that do not begin with the letter D. All BS&A databases start with an application code of D (most are followed by numeric characters, with the exception of Tax History [DTaxHistory] and MR History [DMRHistory]).

- iii. Once all databases to move are in the Databases to Copy column, click **Ok**.
12. Close the Admin Tool, then open it back up, but do not log in.
 13. Click the "Click to setup" link in the lower right, type in the name of the new server, and click **Close**.
 14. Log in to the Admin Tool, go to **Utilities**, and select **Mass Change Common Folders**:



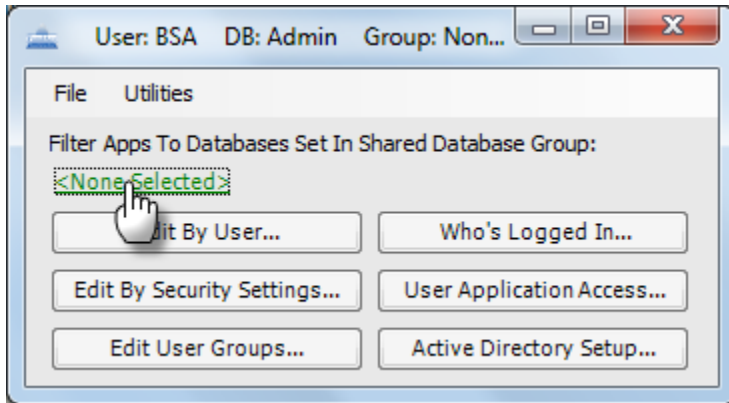
- i. A list of all installed .NET programs appears. Next to each program, type in the UNC path to the Shared Program Folder on the new server:



- ii. Once all paths have been entered, click **Save**.

15. If your databases are part of a Shared Database Group, continue with the instructions immediately following. If not, continue with step 16.

i. While the Admin Tool is still open, click [<None Selected>](#).



ii. Open the **Database Group Name** dropdown and select your database group. The links to all of the old databases should be displayed beneath this field.

iii. To change to the new server, double-click program line item, connect to the new server, and select the database from the **Name** dropdown; click **Ok** to return to Shared Database Group Management.

iv. Repeat for all programs and click **Close** when finished.

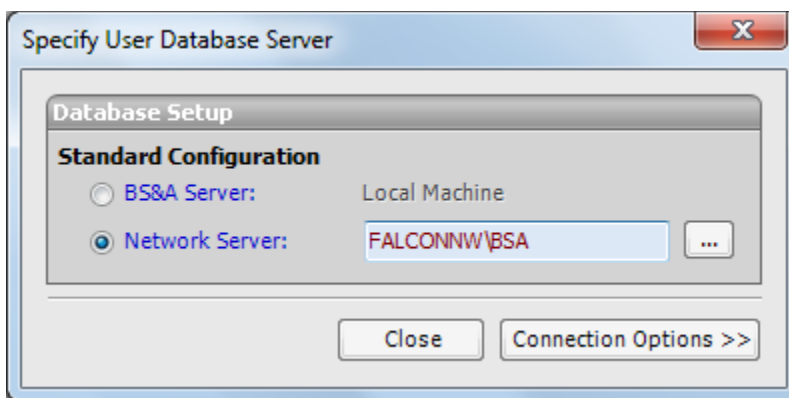
16. Finally, point all programs on the workstation to the new server. This set of instructions will need to be repeated for each program installed on the machine.

i. Open one of the BS&A programs.

ii. On the Login screen, click [Click to Setup...](#)

iii. Click **Network Server**.

iv. Type in your server and SQL instance name.



v. Click **Close**.

17. Provided your connection is successful, log in to the program with the same user name and password as before the move.