12d Synergy Migration Guide

Contents

1.0 Introduction

The purpose of this guide is to provide detailed steps on how to migrate the 12d Synergy server to another server.

1.1   Tools needed

Currently, this is largely a manual process. Future releases may include an automated tool to assist in this process. Until this time, you will need the following tools:

1. SQL Server Management Studio
2. 12d Synergy Server Upgrader

1.2   Scope

This document will discuss the necessary steps to reconfigure 12d Synergy during and after a migration.

The following are considered outside the scope of this document:

1. Migrating a database to another instance of SQL Server
2. Redefining the appropriate port forwards for firewalls

1.3   Information needed

Before you begin, you should determine the values of the following information:

1. File Stores
   You may have one or more file stores that may need to be migrated. The locations and types of these are available in the 12d Synergy Administrator, under File Storage

2. Index Location
   The location of your index may also need to be migrated. This is available in the 12d Synergy Administrator, under System Settings/Indexing Directory

3. 12d Model Shares
   If you are using 12d model sharing, this will need to be remapped using a script provided by the 12d Synergy Technical Team. Please contact support for this file.

2.0 Preparing to Migrate

2.1 File Copies

If you have a large data set, it may take some time to copy file data from one server to another. This is especially true if you are copying from one VM to another. As such, it is generally recommended that you

1. Start a file copy early (the week before)
2. At the time of migration, stop the server and backup the database (as per 3.2)
3. Complete the file copy again, skipping files that were already copied

This may require the use of a tool such as RoboCopy, but will save time migrating large amounts of data.

2.2 Risk Mitigation

If something goes wrong with the migration, make sure you leave the old server in a state that you can rollback to it if necessary. For example,

1) Do not move the files during the file migration step
2) Do not drop the database until you are sure the system is ready and up and running

3.0 Migrating the 12d Synergy Server

3.1 Check in all data

Make sure all user data is checked in, to prevent data loss.

3.2 Backup your database

Make sure you take a backup of your database in case of errors during the process. To backup your database, you should use SQL Server Management Studio.

1. Select the 12d Synergy Database
2. Right Click and Select Tasks -> Backup
3. Remove any current backup destination and add a new one
4. Click okay to begin your backup

3.3 Migrate the General Store

Your general store may be stored on network attached storage, in which case this step may be unnecessary.

However, if you do need to migrate the General Store, you will need to follow these steps:

1. Open SQL Server Management Studio
2. Connect to the 12d Synergy Database
3. Edit the table **Setting** by right clicking the table and selecting "Edit Top 200 Rows"
4. Find the setting named **GeneralStorage**
5. Copy the General Store directory to its new location
6. Update the path in the table to the new location

3.4   Migrate the Delta Cache

Your delta cache may be stored on network attached storage, in which case this step may be unnecessary.

However, if you do need to migrate the Delta Cache, you will need to follow these steps:

1. Open SQL Server Management Studio
2. Connect to the 12d Synergy Database
3. Edit the table **Setting** by right clicking the table and selecting "Edit Top 200 Rows"
4. Find the setting named **DeltaCachelocation**
5. Copy the delta cache directory to its new location
6. Update the path in the table to the new location

3.5   Migrate the File Log

Your file log may be stored on network attached storage, in which case this step may be unnecessary.

However, if you do need to migrate the file log, you will need to follow these steps:

1. Open SQL Server Management Studio
2. Connect to the 12d Synergy Database
3. Edit the table **Setting** by right clicking the table and selecting "Edit Top 200 Rows"
4. Find the setting named **FileLogPath**
5. Copy the file log to its new location
6. Update the path in the table to the new location

3.6   Migrate the File Stores

Your file stores may be stored on network attached storage, in which case this step may be unnecessary.

However, if you do need to migrate the file stores, you will need to follow these steps:

1. Copy the File Storage directories to their new locations
2. Open SQL Server Management Studio
3. Connect to the 12d Synergy Database
4. Update paths for any "Full" File Stores
    a. Edit the table **FileDiskStore** by right clicking the table and selecting "Edit Top 200 Rows"
    b. Update the value of **StoreLocation** appropriately
5. Update paths for "Delta" File Stores
    a. Edit the table **FileDeltaStore** by right clicking the table and selecting "Edit Top 200 Rows"
    b. Update the value of **StoreLocation** appropriately

3.7   Migrate the Index

Your index may be stored on network attached storage, in which case this step may be unnecessary.

However, if you do need to migrate the index, you will need to follow these steps:

6. Open SQL Server Management Studio
7. Connect to the 12d Synergy Database
8. Edit the table **Setting** by right clicking the table and selecting "Edit Top 200 Rows"
9. Find the setting named **IndexDirectory**
10. Copy the index directory to its new location
11. Update the path in the table to the new location

3.8   Change the Host Name

If you have decommissioned an old server and are building a new server with the same name, this step is unnecessary.

To update the server name advertised to clients, follow these steps:

1. Open SQL Server Management Studio
2. Edit the table **Setting** by right clicking the table and selecting "Edit"
3. Update the value of **HostAddress** to the new server name
4. Edit the table **Server** by right clicking the table and selecting "Edit"
5. Update the value of **ServerName** to the new server name

3.9   SSL Certificates

If you are using SSL Certificates for Custom Logins or Files over the Web, you will need to add these to your new server before starting the 12d Synergy service.

The process for migrating certificates varies depending on your specific rollout – if the external facing address has not changed, you may not need to generate new certificates. However, if you are connecting via an IP address, you may need to recreate your certificates.

The relevant 12d Synergy certificates need to be placed in the following stores:

- LocalMachine\TrustedPeople
- LocalMachine\Personal

If you are able to move an existing certificate, you can find the certificate on the old server by looking for its thumbprint – this can be retrieved from 12d Synergy itself either via

1. the 12d Synergy Administrator under System Settings->SSL Certificates->Use an Existing Certificate
2. In the **Settings** table, under the name **AuthCertificateThumbprint**

Be aware that the Private Key must be exported – which may require the password that was used when your IT teams added the certificate initially.

3.10   Run the Upgrader on the New Server

You will now need to run the standard Server Upgrader on the new server. This will perform an install without creating a new database – but you will need to nominate, when prompted, the following details:

1. A service account to run the 12d Synergy Service
2. The connection details for your database, which may be different if the database has been migrated to a new SQL Server Instance

3.11   Install the Microsoft C++ Runtime for 2012

This is required by 12d model analysis. It is installed when completing an initial install, but not at upgrade time.

You can download this file from: http://downloads.12dsynergy.com/vcredist_2012_x86.exe

3.12   Remap 12d Model Shares

If you are using 12d Model shares, they may be pointing to the old server and will need to be explicitly updated. Use the steps below to remap the shares. If this is required, the 12d Synergy Technical Team will provide you with a script to perform this operation. This will promote the version of each 12d model project, so they must be checked in before this can take place.

1. Open the 12d Synergy Administrator
2. Select the 'Scripts' option
3. Select the 'Tasks Library' tab
4. Click the Add button and browse to the DLL provided
5. Give it a name and click ok
6. When it is in the list, select it and click 'Configure' next to the 12d Model Share Migration task
7. Enter the name of the original server and the name of the new server in the appropriate fields
8. Click Set
9. Click Run

3.13   Updating Server Addresses

The server address at each client must be updated – this can be updated by clicking the Servers button on the connection screen within the client, or can be achieved simply by connecting to the new address.

4.0 Final Steps

As a note, you may need to update firewall settings (such as NAT port mappings) to allow external access and file publishing to work with your new server.

You should also update backup plans for the new server.

Make sure you shut down the original server service to prevent accidental connection to the old system.

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