

DSP® Instance Cloning Supplement to the Installation Guide

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DSP® Instance Cloning Procedure

Introduction

Cloning a DSP (6.x and above) instance is a complex process that needs careful planning and involves a multi-step process. The DSP setup.exe must be installed as usual onto the new computer, and it must be installed in the same way (i.e., into the exact same path) as the SOURCE server to make for the easiest possible migration. Throughout this manual, the DSP instance to be cloned will be referred to as the SOURCE server, and the new DSP instance created as the DESTINATION server.

NOTE: This is a high-level document and is meant to supplement existing installation documentation, and does not provide a comprehensive how-to guide. This document assumes the original installation was completed successfully per the installation guide and no unsupported application modifications have been made.

Prerequisites

The SOURCE version and the new DESTINATION versions must be the exact same version of DSP – e.g., 6.7.1. This might require the SOURCE environment to be upgraded to the latest version (which is the recommended procedure in any case).

All prerequisites per the installation documentation must be met and verified on the DESTINATION server, prior to the cloning procedure being attempted.

Some application unavailability will be required to ensure that the cloning procedure can be performed while the application is in a fixed state; however, the period of outage is short.

Procedure

On the SOURCE instance:

1. Record the following information about the SOURCE instance for later use:
DSP installation path (defaults to C:\Program Files (x86)\BOA\DSP): _____
CranSoft Service name (suffix): _____
2. Stop all CranSoft services via the Administrative Tools / Services console.
3. Stop IIS. Open a command prompt as administrator and type: IISreset –stop.
4. Back up all databases on the SOURCE SQL Server and copy the backup files to the DESTINATION SQL Server. (This might need to be done by client IT/DBA staff.) Do not restore the backup databases on the DESTINATION SQL server at this time.
5. Back up the Web subfolder (and all its contents) of the DSP installation folder on the SOURCE web server and copy the files to a temporary location on the DESTINATION Application Server.

NOTE: IIS and the CranSoft Service(s) on the SOURCE server can now be restarted if desired and the instance may be used as normal.

6. Copy any local File Paths defined on the SOURCE (check the Data Sources page) to the DESTINATION server (if the contents need to be available on the DESTINATION server).

On the DESTINATION instance:

1. **Follow the installation guide** to configure the DESTINATION environment with all Windows roles, features and prerequisites. Stop at the section named **Before Proceeding with the BOA Solutions Installation** and record in that section the settings that will be used for the DESTINATION instance, making them the same as the SOURCE instance where this is beneficial.

NOTE: On the DESTINATION server, Application Name, Application Pool Name, CranSoft SQL Login name and password do NOT need to be the same as the SOURCE server. SQL Server Address on the DESTINATION server MUST be different to the SOURCE server. BackOffice strongly recommends that the CranSoft Service Name should be the same as the SOURCE server.

2. Continue through the steps in the Installation Guide and install the Package Manager, BOA Solutions, and DBMoto using the settings specified.
3. Do not perform any post-installation steps or apply any patches.
4. Stop IIS. Open a command prompt as administrator and type: IISreset -stop. Confirm that the CranSoft Service is also not running.
5. Restore all databases from the SOURCE SQL Server to the DESTINATION SQL Server.
6. Make sure that the DSP SQL login has db_owner role to all the restored databases.
NOTE: If an error appears indicating that the user already exists in the databases, then the user will need to be removed from each of the databases individually, before assigning the login to the db_owner role.
7. Copy the \Web\ folder from the SOURCE server over the \Web\ folder on the DESTINATION server.
8. Open the CranBerryConfigurator.exe tool (found under \Web\Bin\) and update the server connection information with the name of the DESTINATION SQL Server, and the CranSoft SQL login name and password as appropriate.
9. In SQL Server Management Studio, review the contents of the DataSource table and update values in the ServerAddress column to replace the SOURCE SQL Server name with the DESTINATION SQL Server name.
10. In SQL Server Management Studio, run script to update the ServerAddress value in DSPCommon.dbo.ttDataSourceRegistry replacing the values in < > with appropriate values.

```
UPDATE [DSPCommon].[dbo].[ttDataSourceRegistry]
SET ServerAddress = '<DESTINATION SQL Server Address>'
WHERE ServerAddress = '<SOURCE SQL Server Address>'
```

11. In SQL Server Management Studio, CranSoft database, truncate the following tables: LogEntry, SessionHistory, Setting.
12. In SQL Server Management Studio, CranSoft database, execute the statement:

DELETE FROM CranSoft.dbo.JobQueue.

13. Start IIS. Open a command prompt as administrator and type: IISreset –start.

14. Log in to the DESTINATION DSP site and confirm basic functionality.

NOTE: A new license will be required and the HardwareID, Server Name, etc. will be required to generate that license using the steps indicated in the Installation Guide.

15. Navigate to System Administration \ Configuration \ Parameters and update the Web Site Root parameter to match the new server name and configure the Instance identifier.

16. Review the System Administration \ Configuration \ Data Sources page and make sure that any UNC type data sources are updated to reflect any changed server names.

17. Review the System Administration \ Configuration \ Data Sources page and make sure that all local file paths referenced exist on the DESTINATION Application Server and have the correct permissions assigned. See the **Set Up and Configure File Paths on the Server** section of the Installation Guide.

NOTE: You can copy the folders from the SOURCE server if you need to retain that information. Be sure to set up the security as per the Installation Guide.

18. Confirm that SMTP configuration is the same as for the SOURCE server.

19. Start the CranSoft Service using the Services console and confirm that jobs process correctly.

NOTE: If the jobs do not process, or the service does not seem to be created properly, delete the service (using the configurator), remove all rows from the CranSoft.dbo.Service table and then recreate a new service and queues.

Troubleshooting or Optional Configuration Steps

- Remove and recreate the service and delete references to the old service from the database as described above.
- Recheck file permissions on paths – both the DSP installation patch and any local or remote file paths.
- If Integrated Authentication is used on the source server, it must also be configured on the DESTINATION server. This must be done post-clone and must follow the steps in the [Authentication Configuration Manual for Windows Server 2008 and Windows Server 2012](#).
- Check existence of local folders and permissions.
- In the event of problems, validate data sources, recompile data sources and clear cache.
- DBMoto is not addressed in detail in this guide but configuration may be transferred using the metadata export and import feature described below.
- DTS and SSIS package notes:
 - o DTS packages are stored in MSDB and can be regenerated from Collect (SQL Server 2008 only).
 - o ManualDTS packages have to be opened on the old server and solved on the new server (SQL Server 2008 only).
 - o SSIS packages are stored in the file system and can be regenerated by Collect.

- ManualSSIS packages have to be copied as files to the new server, and then opened to update the connection information manually.
- DBMoto configuration may be exported and reimported using the Management Center interface or regenerated on the new Collect instance.

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