Keyhouse Migration Process to New Server

Overview

This document describes the process of migrating Keyhouse software and data from one server to another.

Warning: The migration process can take a number of hours to complete. All users are required to be out of the system during the migration process.

Please note: Sufficient notice is required if you wish Keyhouse to assist in this process.

Cost/Charge: On request Keyhouse can provide extra assistance in the install of SQL server software and the copying of data; however there is a charge for this work. Any chargeable work will require the client firm's confirmation before proceeding.

Preparation

Before scheduling the migration we recommend the new server be installed and configured as per the Keyhouse server specification.

There are two distinct parts to Keyhouse for migration one the database and two the folder structure. These can be migrated separately or together.

Microsoft SQL server should be installed and tested before proceeding with the live migration.

A share folder should be setup for the migration of Keyhouse Programs and documents. Ensure the required space is available on the share and full control permission is configured to this share.
The preparation is to be completed by the client and/or IT supplier of the firm/company.

Backup SQL Data

Backup the Keyhouse SQL Database. Note there may be a number of Keyhouse databases for previous accounting year ends. These databases will be required to be included in the backup for the client to view previous accounting years.
Keyhouse will assist the client and or IT supplier with the SQL backup.

Copy Data

Copy all the Keyhouse folders, subfolders and the SQL backup files from the old server share to the new server share.
This process is to be carried out and verified by the client and/or the IT supplier of the company.

Restore SQL Data

Restore Keyhouse SQL Database(s). A restore for each account year is required.
Keyhouse will assist the client and/or IT supplier with the SQL Restore.

MAP Drive

The existing mapped drive is to be changed to point to the new shared folder. Note it is important that the new mapping maintains the same structure as the old mapping. Failure to maintain the structure can result in lost documents. This change is required on each PC.
This change will be made by the client and/or IT supplier of the company.

Please ensure all program shortcuts to Keyhouse use the above drive mapping and not the UNC path. Example: Shortcut to desktop.exe should read k:\programs\desktop.exe and not \\servername\keyhouse\programs\desktop.exe

ODBC and Configuration Files

Open the sam.ini using notepad and change the following line:
> *Server= NewSQLServerName*

The sam.ini file is located in the Keyhouse programs folder.

Note: The sam.ini file for each accounting year will required the above change. The sam.ini file for each year will be located in the sam2000.exe folder for each year. If you have any issues locating this file please contact Keyhouse support.

ODBC settings are required to be changed on each client PC. The server name is to be changed to the new server name. *See notes on setup of ODBC settings in the Keyhouse client PC setup procedure.*

TIP for IT Suppliers: You can alternatively add the following line to the user's login script. This will then automatically change the above setting on each PC at login stage.

ODBCconf.exe configsysdsn "SQL Server"
"DSN=Keyhouse|server=*<YourNewServerName>*/description=Keyhouse software|Trusted_Connection=No|Database=Keyhouse"

Remember to change *<YourNewServerName>* in the above script.

Keyhouse Text Search.

If the firm is using Keyhouse Text Search Facility you will need to contact Keyhouse support after the migration is complete to reinitialise the text search engine.

Keyhouse Scan Capture

If the firm is moving the users' scan folder, please ensure the scan folder location setting is changed where required in Keyhouse.
See file preferences in the scan capture utility.

Schedule Tasks

Once Keyhouse SQL database is migrated to the new server there may be a requirement to setup some routine maintenance tasks. Please contact Keyhouse support to request the setup of these scheduled tasks.

It is recommend you notify Keyhouse before the migration is planned in order for Keyhouse to check scheduled tasks on existing server.

Migration Test Check List

After performing a server migration the following check should be undertaken by the client and or the IT supplier.

Check	Result
Login to Keyhouse	
User can access existing documents	
User generate new documents	
User can save e-mail from outlook	
User can capture documents	
User can scan capture	
User can perform text search	
User can run crystal reports	
User can create/play dictations	

Note: The above check list should be carried out on each pc after the upgrade process is complete.

Other Considerations

Outlook: Before checking the outlook link ensure the user logs into Keyhouse desktop before opening outlook for the first time.

Web Module: Note the procedure does not include the migration of the Keyhouse WEB module. Firms who have the Keyhouse web module should contact Keyhouse for further assistance. If the firm is migrating the Keyhouse server but not the web module server you still need to contact Keyhouse for assistance.

Queries / Contact

If you require any further information or assistance please contact Keyhouse support on

Sam Support: Ph: +353 1 2902222 - option 1
Case Support Ph: +353 1 2902222 - option 2

Email: support@keyhouse.assist.com

Check our Web site for all the latest information @ www.keyhouse.ie