

Server Moves, Upgrading Hardware

If you are considering updating your server, moving to a new pc or thinking of moving to a virtual/cloud hosted environment you need to consider this well in advance and inform us that you will be making this move. Migration of the software and database is not something you can do yourself easily. Relate Software products such as DRIVE, Relate Accounts Production and Relate Personal Tax all work using Microsoft SQL which is a big database that involves a certain level of knowledge to implement or move. There are a number of things to consider in the move.

Server Moves & Hardware upgrades / installs are not covered under the Relate Support contract. We are happy to provide guidelines. If you would like Relate to carry out the software and database move there is a charge based upon the amount of work / time involved. Please note that Server Moves / Installations must be scheduled in advance and are generally carried out on a Thursday or Friday.

Work involved in a server/database move

A scoping exercise will be carried out to determine all of the links that have been created in DRIVE in order to ensure that any move will be successful. The paths recorded in the scoping exercise will determine the level of scripting needed to be done in Microsoft SQL at the end of the move. We will also need to have a conference call with the IT administrator and the main project lead in the practice to determine the plan and what is expected of each party.

The following items need to be backed up / transferred when moving the Server:

1. Letter template
2. Bill template
3. Credit Note template
4. Statement template
5. Linked documents
6. E-mails
7. Scanned documents
8. Client folder paths document
9. Drive data and folder structure documented.

We can offer guidelines on the following when moving DRIVE to a new Server:

1. Backup of current data set through SQL
2. Installation of SQL on new Server (full SQL must be installed by IT administrator)
3. Installation of DRIVE on new server
4. SQL configured for remote connections
5. SQL configured for remote connections
6. Data copied across to new server
7. SQL configured for Window Authentication access
8. Protocols on Server set up
9. Client machine configured SQL connection
10. Protocols configures on client machine
11. SQL mapping scripted to remap all linked documents
12. Ports used by DRIVE unblocked

As you can see from the above a server move involves quite a bit of work, so please inform support support@relate-software.com well in advance.