

Rembrandt Lending System

Moving Rembrandt to a New Server

SQL Server 2005 Edition

October 2006

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Version

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U.S. Patent No. 6,006,242

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Table of Contents

| | |
|---------------------------------|---|
| Introduction | 1 |
| On the Source Server | 2 |
| On the Destination Server | 3 |
| Both Servers | 6 |

Introduction

The steps necessary to move a network installation of Rembrandt from one server to another are outlined in this document. Rembrandt is supported for production use with SQL Server 2005 beginning with version 10.0.

If you require step-by-step assistance to perform the steps in this document, additional charges may apply. To request step-by-step assistance, please contact WKFS SupportLine by calling 1-800-274-2711, X4081 to schedule assistance. Depending upon technician availability, we may require up to 5 business days advance notice to perform the assistance requested. If questions arise while reviewing this document, please contact WKFS SupportLine.

For the purpose of this document, the following requirements must be met:

- A complete backup on the source and destination server must be completed by the organization prior to attempting this task, even if professional assistance is provided to the organization by a WKFS technician. Information on backing up Rembrandt can be found within the Rembrandt Maintenance document on our [Support.BankersSystems.com website](http://Support.BankersSystems.com), under the Rembrandt installation instructions link.
- Domain administrator access is required for the personnel performing the data move.
- There is no 'data merge' capability within the software; the data move is an all at once move with no incremental data transfers allowed once the data has been transferred.
- The "source" server refers to the server where Rembrandt is currently installed and where your data currently resides. The "destination" server refers to the new server where the Rembrandt data is intended to be placed.
- The "source" and "destination" server must be on the same version of Rembrandt.
- Users will not be allowed access to the Source or Destination server during the data move process.
- Specific Rembrandt hardware requirements must be met prior to installing the Rembrandt software onto a new system. If in doubt, please call our SupportLine at 1-800-274-2711 x4081 prior to continuing with this document.
- The financial organizations personnel performing the data move must have the skill-set required to follow this document successfully on their own.
- The source and destination servers must contain all Rembrandt components installed locally to the servers' operating system. This document does not describe the process of separating Rembrandt components onto multiple servers, nor does it cover the process of consolidating Rembrandt components from multiple servers.
- WKFS technicians will require remote access to the source and destination servers if requested to provide professional services. WKFS currently uses Microsoft Live Meeting for remote support.
- All new installations (destination servers) intended for production use of the software, must be on servers that are member servers within a production domain, not on a domain controller

and not within a test domain. Once installed to the destination server, the Rembrandt server cannot be moved from a 'test' domain to a 'production' domain using this document.

Important! During this process, you will be directed to complete steps at the source server and steps at the destination server. Please be sure to pay careful attention to the server (source or destination) you are directed to use for each set of steps.

On the Source Server

1. Document the names listed in the source servers' local RembrandtUsers group. If your organization also uses a RMBTGlobal group, then you must also document the contents of the RMBTGlobal group.
2. Document your custom configuration of Rembrandt's User Management by taking screen prints or detailed notes on how users, groups and organizations have been setup in the Rembrandt User Management utility, paying special attention to group and user security. This information is most important for those who will be restoring Rembrandt data into a new domain. Rembrandt's security integrates with the domain/operating system security; therefore, if a network security identifier of a user's login changes, it will be reflected in SQL Server, Windows and Rembrandt as though the user is a new user within the software. Just having similar login id's does not necessarily equate to being the same user in Windows, SQL Server or the Rembrandt software.
3. Detach the Rembrandt database using SQL Server tools such as SQL Server 2000's Enterprise Manager or SQL Server 2005's SQL Server Management Studio. To detach the database:
 - a. Highlight the Rembrandt database, right click, select Tasks, Detach.
 - b. On the Detach Database window, verify the correct database is shown.
 - c. Select OK to continue.

Detaching the database allows you to copy the database files according to SQL Server best practices prior to transferring to the destination server.

4. Copy the RembrandtX_X.mdf and RembrandtX_X_log.ldf files from the source server to a shared location that is also accessible from the destination server.

Note: Do not 'cut' the files from the source system.

X_X represents the version of Rembrandt you are moving.

The default location of the database files is the SQL Server 2005 default location of:
%:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data\

5. If the source server will no longer be used, continue with step 7. If the source server will continue to be used, the RembrandtX_X database must be reattached to the source server before it can be used again with Rembrandt:

- a. To attach the database using SQL Servers Management Studio, right click on the Databases folder and select 'attach.'
 - b. Within the Attach Database window, select Add. The window should default to the location containing the RembrandtX_X.mdf.
 - c. Highlight the RembrandtX_X.mdf file and click OK.
6. If you are moving data between SQL Server 2000 to a SQL Server 2005 system, the database will be 'upgraded' to work with SQL Server 2005 during the database attachment process. Once the database files have been upgraded by the attachment process, they can not be moved back to the SQL Server 2000 system. This also means, using this documentation, it would not be possible to take a database from a SQL Server 2005 system and attach it to a SQL Server 2000 system, even for testing purposes.

On the Destination Server

7. Install Rembrandt using the Rembrandt New Server Installation Instructions available on our support.bankerssystems.com website. Be sure you are installing the same version of Rembrandt as is installed on the source server. Rembrandt data may only be transferred from like versions of the software.
8. Once installed, the software must be tested on the destination system prior to restoring data from the source system. Recommended steps used to test the success of the installation are available by downloading a copy of the "Installation Test Procedures" document from:
Support.BankersSystems.com/Product_Support/Rembrandt_installation.html.
9. Using the list of names documented in step 1, verify the contents and add any missing names to the RMBTGlobal group within your Windows domain. This step is most important when Rembrandt data is restored to a new Windows domain.
10. Delete the newly created "blank" Rembrandt database from the destination server using SQL Server 2005's Management Studio. To delete a database, highlight the database intended for deletion, right click and select delete from the menu.
11. Copy the source server's detached RembrandtX_X.mdf and RembrandtX_X_log.ldf files from the shared location that was established in step 4 to the destination servers default location for SQL Server 2005 database files, that is, %:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data\

Note: The database files must exist on the systems local drive. Database files cannot be attached to SQL Server successfully if they exist on a network drive or network share.

12. Use SQL Server 2005's Management Studio utility to attach the Rembrandt database to the destination servers SQL Server:
 - a. Right-click the Databases folder and select Attach... The Attach Databases screen will appear.

- b. Select Add within the Databases to Attach window.
- c. Navigate to the location of SQL Server 2005's database files as described in step 11.
- d. Select the RembrandtX_X.mdf file.
- e. Click OK once the locations have been verified. Do not proceed if you receive a failure message.

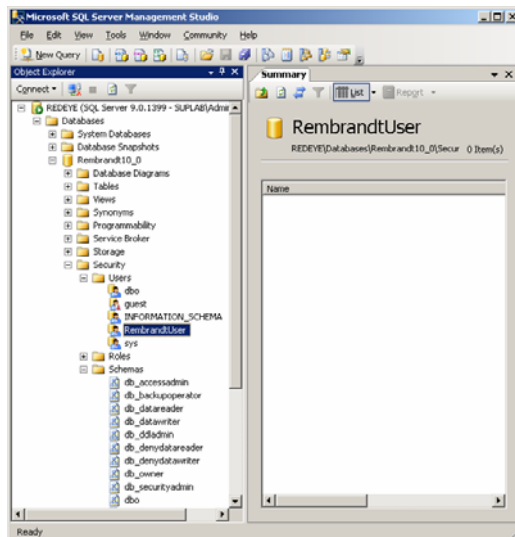
NOTE: A failure on attaching a database typically indicates a problem with the database files themselves. You must correct the error or problem before continuing with the steps in this document.

Once the database has been successfully attached, the Rembrandt database security must be modified to integrate with the security of the new or destination server.

13. Within SQL Server 2005's Management Studio:

- a. Open Databases.
- b. Open the newly attached RembrandtX_X database.
- c. Open Security.
- d. Open Schemas.
- e. Highlight RembrandtUser and delete the RembrandtUser schema.
- f. Close schemas.

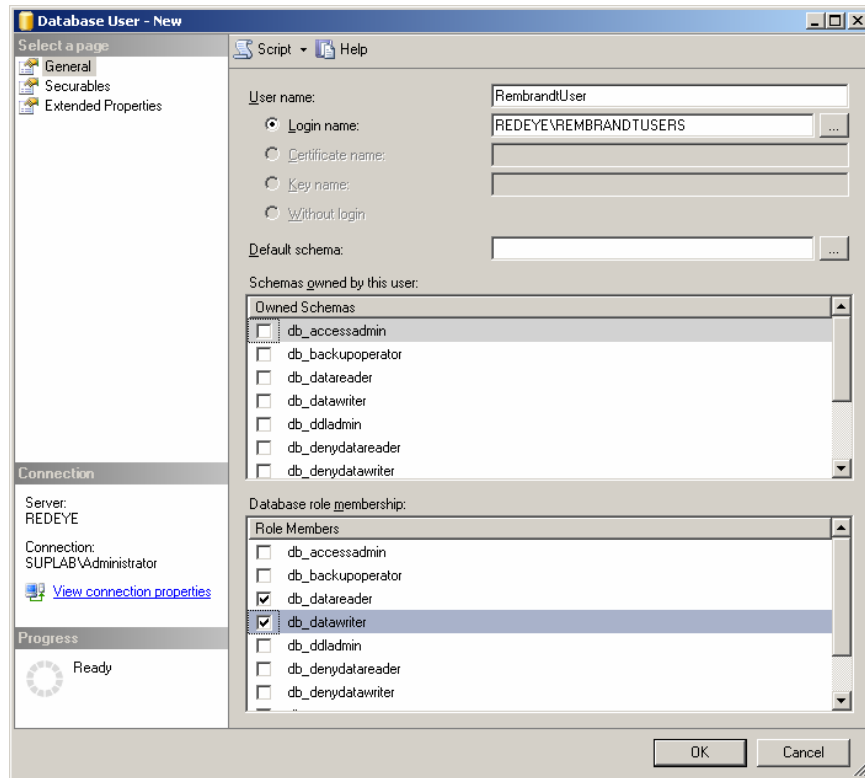
If a RembrandtUser schema does NOT exist, you will need to transfer ownership of the db_datareader and db_datawriter schemas from RembrandtUser back to db_datareader and db_datawriter respectively.



- g. Open Users.

- h. Highlight RembrandtUser and delete the RembrandtUser database user.

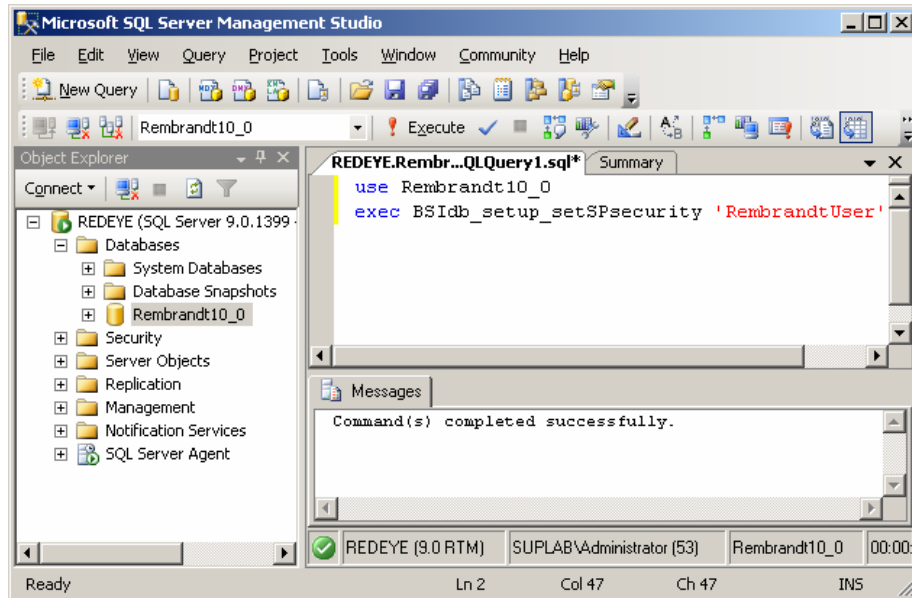
Steps to recreate the RembrandtUser database user under the RembrandtX_X database and associate it with the destination servers RembrandtUsers group:



- i. With the RembrandtX_X database folder still open, right click on user.
- j. Select New User...
- k. The Database User -New window will appear.
- l. Within the username field, type RembrandtUser. You must spell it exactly as shown.
- m. Within the login name field, click on the ... (browse) button. The Select Login screen will appear.
- n. Select the Browse button again, locate the destination servers local ComputerName\RembrandtUsers login, click in the checkbox to the left of the ComputerName\RembrandtUsers login to select it.
- o. Click OK.
- p. Within the database role membership category of the database user screen, select both of the following role memberships.
- Db_datareader
 - db_datawriter.

Note: Do not de-select or remove any default roles.

- q. Click OK.
14. Open the “New Query” option on the toolbar of SQL Servers Management Studio utility.



15. Within the query window, type the following command as shown below. Be careful to change the Rembrandt database version to reflect the version you have:

```
Use RembrandtX_X
Exec BSIdb_setup_setSPsecurity 'RembrandtUser'
Go
```

16. Click on the red exclamation point or press the F5 function key to execute the SQL statement. A message will be displayed indicating success or failure. If a failure message is received, do not continue with this document until the issue is resolved.

Both Servers

Complete the following steps on both servers.

17. Stop the BSI DocServices service on both the source and destination servers. From Administrative Tools, select Services and stop the BSI DocServices service.
18. Copy the numbered organization folders from the source server to the destination or new server using the paths specified below:

```
%:\BSIApps\Rembrandt\DDS\Jigsaw\WWW\dds
-or-
%:\Program Files\Common Files\BSI Shared\Document Services\Jigsaw\WWW\dds
```

On the source server, the numbered organization folders should be located in one of two paths. On the destination server, the numbered organization folders will exist only in the second path listed.

Note: Do not copy the entire Rembrandt or DDS folder from the source server to the destination server because it contains information that is specific to the specific server the software was installed to and will cause the new installation of Rembrandt on the destination server to become corrupted.

19. Restart the BSI DocServices on both servers. From Administrative Tools, select Services and start the BSI DocServices service.

20. Using Windows Explorer, navigate to the Rembrandt folder, double click vuminit.exe to reset security to reset Rembrandt security on the destination server.

If you do not find vuminit.exe in the Rembrandt folder of the destination server, the file can also be found on the Rembrandt x_x installation CD within the %:\Files\bin\both folder.

21. Using Windows Explorer, navigate to the Rembrandt folder:

- Double click on Repuborg.exe to re-publish the organizational catalog
- Double click on dbDataExchangeInit.exe to reset data exchange

22. On the Rembrandt client workstations or Terminal Servers, the Rembrandt client software must be removed using the Add/Remove Programs applet in Control Panel and then reinstalled from the Add/Remove Programs applet in Control Panel. Once in Control Panel, navigate to the new servers Rembrandt\client setup folder and open Setup.exe. This will reinstall the Rembrandt client software and point the client workstations to the new destination server, ensuring all data will now be saved on the new/destination server.

23. Additional Steps:

- Interfaces to the Rembrandt software must be reconfigured on the destination server.
- Credit insurance forms or custom forms must be reinstalled on the destination server.

