

Base Server Migration / Test Server Steps Outline

03/26/2025 9:28 am EDT

Outline of steps to complete a server migration or Test Server Environment

(This walkthrough assumes you have access and understand how to create/restore SQL backups + SQL users in SQL Server Management Studio. This walkthrough does not include steps for installing or configuring Windows Server, Microsoft SQL Server, SSRS, DNS or moving any additional products like SedonaWeb, SedonaSync, or SedonaFSU.)

Your initial step will be to set up your new SQL server. Ensure that you install the default instance (MSSQLSERVER) is in parity with your current version of SQL or newer with both mixed mode security and named pipes enabled.

The following steps to install the SedonaOffice software on the new server should be done DURING BUSINESS HOURS so support will be available to get you a license key and/or Day Code if needed:

The following applications need to be run on the new server from a single installation/download folder (server install creates a necessary .ini file for client install in the folder it is run from) and prior to moving any of the databases, in this order:

SedonaOffice Server installer:

<https://sedonainstallfiles.s3.us-east-2.amazonaws.com/SOServer5.7.0.0.Rev2.exe>

SedonaOffice Client installer:

<https://sedonainstallfiles.s3.us-east-2.amazonaws.com/SOClient5.6.8.exe>

SedonaOffice Updater to your current version of SO :

This will typically be in your current Install or UNC folder path but can be requested if needed

https://sedonainstallfiles.s3.us-east-2.amazonaws.com/SedonaOffice_Update_57099_Rev_1.exe

https://sedonaofficeupdates.s3.us-west-2.amazonaws.com/SedonaOffice_Update_62013_Rev_2.exe

Once you run the SedonaOffice Server installer you will be prompted to input a license key. Please email the presented Unique Program ID to sedonaoffice_support@boldgroup.com in order to obtain your new license key. Once you receive your new license key, copy it to your clipboard, you can select the License button in the Sedona License Activation window and click Paste to input the copied license key.

Any errors or issues encountered during the installation using fresh installer files will likely be the result of Antivirus/Security software or Windows environment issues interfering with the installer. These and any .Net

framework issues must be sorted out before proceeding.

We strongly recommend the data migration process is done in two phases as we would do through our professional services department. The following steps can be done at any time, but note that professional services will be needed if there is any issues arising from doing the migration yourself.

Phase One:

This phase consists of backing up all of the SedonaOffice related databases from the existing SQL server and restoring them to the new SQL server. This gives you the opportunity to test the new server with real data to ensure stability and that there are no unforeseen issues with the data migration.

Restore your backups to the new SQL server. The databases you should be migrating are as follows: SedonaMaster, SedonaDocuments, and any database(s) referenced by the SedonaMaster's Company table. These are the only databases required for the SedonaOffice Client to function. Any separate databases related to 1st or 3rd party integrations are not impacted by the installer or upgrade files directly and their migration should be coordinated utilizing the proper support channels.

Once the databases are migrated and restored on the new server, all SedonaUser and SedonaReports SQL users need to be dropped from each database and recreated. The below snippet can be run against each database to accomplish this. The SedonaMaster database's Company table will need to be edited so that the ComputerName and Document_Server columns reflect the new server name.

Script to remap SedonaUser and SedonaReports:

```
EXEC sp_change_users_login 'Auto_Fix', 'sedonauser'
```

```
GO
```

```
EXEC sp_change_users_login 'Auto_Fix', 'sedonareports'
```

If the previous databases restored are not current with the SedonaOffice update version that has been run on the new SQL server, you will need to open the SedonaOffice Client Tools and run the Re-Run Last Update option.

That's it for Phase one.

Phase Two:

When you have tested out the stability and performance of the new server and you are ready to finish the migration/test upgrade

If you are Migrating Servers - Stop the SedonaService [also SedonaEFT Service if applicable] on the old SQL Server. This will end all connections to the database from the SedonaOffice application. If you use other products like SedonaSync, SedonaWeb, or SedonaFSU, you can stop those individual sites/services as well or stop the SQL Server Service to end all connections on the old server. [NOTE: Failure to stop the services could result in duplicated data, invoices, events etc]

Create your database backups again, for each of your SedonaOffice related databases: SedonaMaster,

SedonaDocuemnts, and any database referenced by the SedonaMaster's Company table.

Restore the backups to the new SQL Server with the "Overwrite Existing WITH REPLACE" option checked, since they already exist.

Once the databases are migrated and restored on the new server, all SedonaUser and SedonaReports SQL users need to be dropped from each database and recreated. The SedonaMaster database's Company table will need to be edited so that the ComputerName and Document_Server columns reflect the new server name.

After all databases are restored, test to ensure you are able to log into SedonaOffice on the new server.

Any other client installs will need to be adjusted to point to the new server. The easiest way to do this is by exporting a registry key that users can merge into their own registries after modifying the servername and SedonaMaster datasource server names.

HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Sedona Development Company\Client

If you are upgrading multiple through major releases the order is as follows : 5.7.0.99 > 6.1.0.61 > Current Release
