

Moving Rembrandt to a New Standalone

SQL Server 2005 Express Edition

October 2006

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Version

Rembrandt Lending System - Moving Rembrandt to a New Standalone

October, 2006

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

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Introduction

The steps necessary to move Rembrandt (standalone installation) from one workstation to another are outlined in this document. Rembrandt is supported for production use with SQL Server 2005 Express Edition beginning with version 10.0.

If your organizations personnel 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 extension 4081 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 contact WKFS SupportLine.

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

- A complete backup on the source and destination system 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, under the Rembrandt installation instructions link.
- Administrator access to the local operating system 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" system refers to the system where Rembrandt is currently installed and where your data currently resides. The "destination" system refers to the new system where the Rembrandt data is intended to be placed.
- The "source" and "destination" system must be on the same version of Rembrandt.
- Users will not be allowed access to the Source or Destination system 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. If assistance is required, please call us to schedule fee based professional services.
- WKFS technicians will require remote access to the source and destination systems if requested to provide professional services. WKFS currently uses Microsoft Live Meeting for remote support.

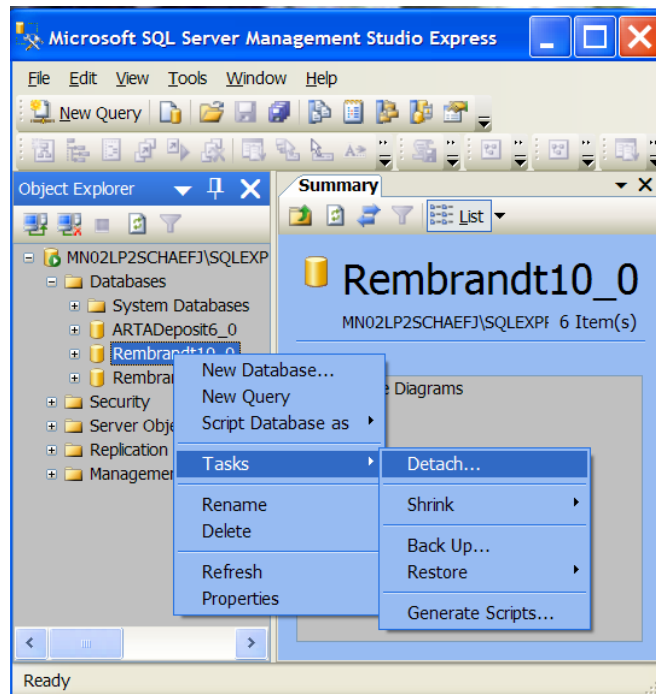
Important! During this process, you will be directed to complete steps at the source system and steps at the destination system. Please be sure to pay careful attention to the system (source or destination) you are directed to use for each set of steps.

On the Source System

1. To move Rembrandt data, this documentation requires the use of Microsoft's free SQL Server Management Studio Express utility. The utility can be downloaded from Microsoft.com:
<http://www.microsoft.com/downloads/details.aspx?FamilyId=C243A5AE-4BD1-4E3D-94B8-5A0F62BF7796&DisplayLang=en>
2. On the Microsoft web page, scroll down to the "Files in This Download" section. Download the file titled "SQLServer2005_SSMSEE.msi."
3. After downloading install the file on both the source and the destination systems. Install the SQL Server 2005 Management Studio Express utility on the Source system now. Follow Microsoft installation instructions on how to install the SQL Server 2005 Management Studio Express utility.

Note: Later in this document, you will be directed to install the SQL Server 2005 Management Studio Express utility onto the Destination system.

4. Document the names listed in the source systems' local RembrandtUsers group. To complete this step, open Control Panel, Administrative Tools, Computer Management, Local Users and Groups, highlight Groups, double click the RembrandtUsers group to display the members.
5. 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.



6. Detach the current Rembrandt database from the MSDERembrandt instance of SQL Server 2005 Express Edition using the SQL Server 2005 Management Studio Express utility. Highlight the database to detach, right click, select Tasks, Detach. On the Detach Database window, verify the correct database is shown, and then select OK to continue. Detaching the current database allows you to copy the database files according to SQL Server best practices prior to transferring to the destination system.
7. Once the database has been detached, copy the RembrandtX_X.mdf and RembrandtX_X_log.ldf files from the source system to a shared location that is also accessible from the destination system. X_X represents the version of Rembrandt you are moving. The database files can be found in the SQL Server 2005 default location of:
%:\Program Files\Microsoft SQL Server\MSSQL\$MSDEREMBRANDT\Data\

Note: Do not 'cut' the files from the source system.
X_X represents the version of the Rembrandt database you are moving.

8. If the source system will no longer be used with Rembrandt, continue with step 9. If the source system will continue to be used, the RembrandtX_X database must be reattached to the source system:
 - a. To attach the database using SQL Server 2005 Management Studio Express, right click on the Databases folder, 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.

On the Destination System

9. Install Rembrandt using the Rembrandt New Standalone 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 system. Rembrandt data may only be transferred between like versions of the software.
10. 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 at Support.BankersSystems.com/Product_Support/Rembrandt_installation.html.
11. Install the SQL Server 2005 Management Studio Express utility onto the destination system, following Microsoft's installation instructions.
12. Using the list of names documented in step 1, verify the contents and add any missing names to the RembrandtUsers group located on the new system within Control Panel, Administrative Tools, Computer Management, Local Users and Groups. Open Groups and highlight the RembrandtUsers group to display its contents.

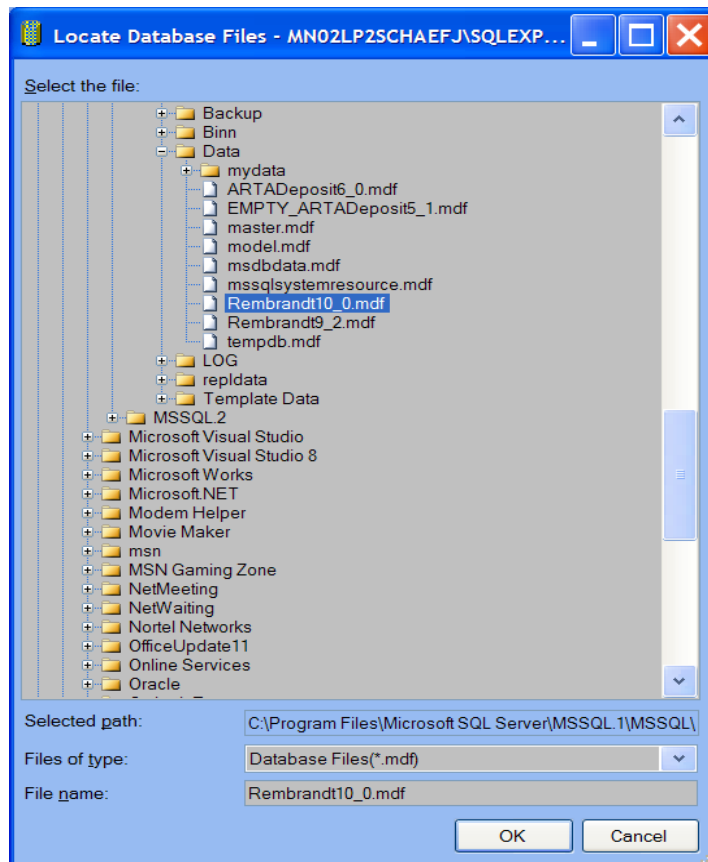
13. Delete the newly created “blank” Rembrandt database files from the destination system using SQL Server 2005 Management Studio Express. To delete a database, highlight the database intended for deletion, right click and select delete from the menu.

14. Copy the source system’s detached RembrandtX_X.mdf and RembrandtX_X_log.ldf files from the shared location that was established in step 7 to the destination systems location of the Rembrandt database i.e. %:\Program Files\Microsoft SQL Server\MSSQL\$MSDEREMBRANDT\Data\

Note: The default destination location of the database files must be used. This is important to maintain Rembrandt and SQL Server’s proper directory structure so that future upgrades to Rembrandt and SQL Server complete successfully.

15. Use the SQL Server 2005 Management Studio Express utility to attach the Rembrandt database to the destination systems SQL Server 2005 Express edition software:

- a. Right-click the Databases folder and select Attach...
- b. The Database to Attach screen will appear.
- c. Select Add.



16. Navigate to the location of SQL Server 2005 Express Edition’s database files as described in step 14.

- g. Open Users.
- h. Highlight RembrandtUser and delete the RembrandtUser database user.

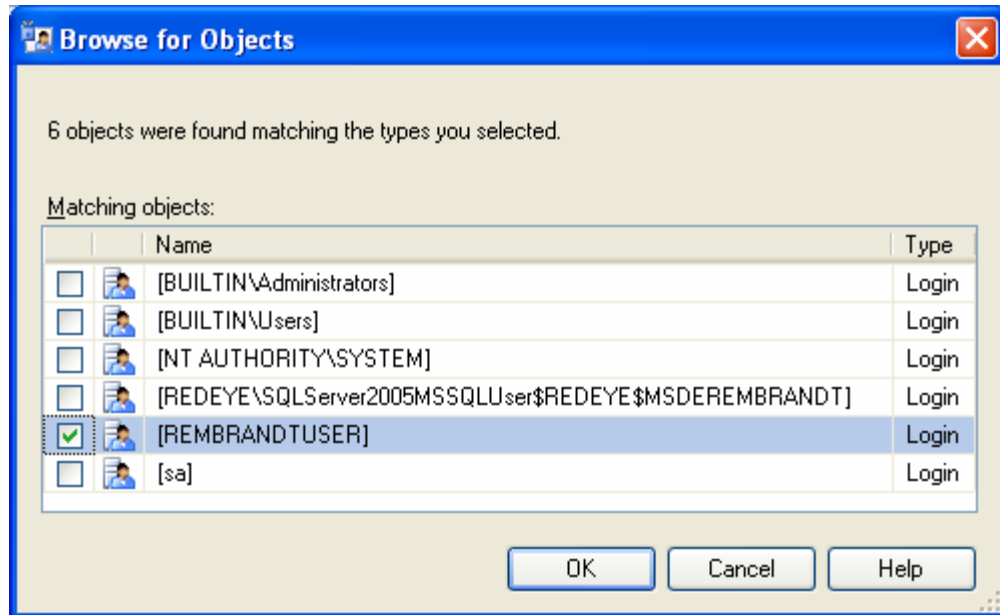
If a RembrandtUser schema does NOT exist, you will need to transfer ownership of the db_datareader and db_datawriter schemas from RembrandtUser back to db_datareader and db_datawriter respectively.

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

- a. With the RembrandtX_X database folder still open, right click on user.
- b. Select New User...

The Database User -New window will appear

- c. Within the username field, type **RembrandtUser**. You must spell it exactly as shown.
- d. Within the login name field, click on the ... (browse) button. The Select Login screen will appear.



- e. Select the Browse button again, locate the destination systems REMBRANDTUSER login, and click in the checkbox to the left of the REMBRANDTUSER login to select it.
- f. Click OK.
- g. Within the database role membership category of the database user screen, select both of the following role memberships. Do not de-select or remove any default roles:
 - db_datareader
 - db_datawriter

- h. Click OK.
20. Open the “New Query” option on the toolbar of the SQL Server 2005 Management Studio Express utility.
21. Within the query window, type the following command as shown below. Be careful to change the Rembrandt database name to reflect the version you have:
- ```
Use RembrandtX_X
Exec BSIdb_setup_setSPsecurity 'RembrandtUser'
Go
```
22. 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 Systems

Complete the following steps on both systems.

23. Stop the BSI DocServices service on both the source and destination systems. From Administrative Tools, select Services and stop the BSI DocServices service.
24. Copy the numbered organization folders from the source system to the destination or new system 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 system, the numbered organization folders will be located in one of two paths. On the destination system, 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 system to the destination system because it contains information that is specific to the specific operating system the software was installed to and will cause the new installation of Rembrandt on the destination system to become corrupted.

25. Restart the BSI DocServices on both systems.
- From Administrative Tools, select Services and start the BSI DocServices service.

## On the Destination System

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

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

27. 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

28. Additional Steps:

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

