

How To Perform a GlobalSearch and GlobalCapture Server Migration

This guide provides the steps necessary for migrating your GlobalSearch and GlobalCapture installation to a new server. **It is strongly recommended that this guide is reviewed in its entirety before beginning the migration process.** Failure to follow these steps accurately may result in an unusable /broken GlobalSearch or GlobalCapture installation.

Important Notes

- If performing an upgrade with your migration, **you do not need to fully upgrade the GlobalSearch or GlobalCapture installation on the old server.** By following these steps, the installer will upgrade your databases to the latest version during the installation process. However, it is recommended that the old server is **upgraded to at least version 4.1.1 before beginning.**
- **There are some steps which cannot be performed without the assistance of a Square 9 technician,** such as transferring registration and making manual changes to SQL databases. If you need to do this as a part of your migration, please submit a support ticket at www.square-9.com/support for assistance.
- **Plan your downtime.** GlobalSearch and GlobalCapture should be considered unusable once this process is started. Do not resume normal production until the migration process is complete. It is generally recommended that at least 2 hours of downtime is scheduled, though your actual completion time may vary. Migration time varies widely from system to system, and it will depend on factors such as database size, number of records, and the speeds of the new and old server.
- **Due to the nature of custom scripting, any custom scripting may be lost during migration if special care is not taken.** If you have custom scripting set up by Square 9 Professional Services, contact Square 9 Support before beginning the migration process.

Step 1) Before You Begin

Before you begin the migration process, the following steps will need to be taken.

1. Fully back up your GlobalSearch and GlobalCapture installation as detailed in our [Back Up GlobalSearch](#) and [Back Up GlobalCapture](#) documentation.
2. Confirm that the destination server meets the current GlobalSearch and GlobalCapture [Infrastructure and Hardware Requirements](#).
3. If you are currently using GlobalSearch 4.1.0 or older, it is recommended that the old server is upgraded to at least version 4.1.1.
 - Upgrading the old server to GlobalSearch 4.5.2 (or later) with GlobalCapture 2.1.2 (or later) will allow you to migrate your workflows and batch history using the built-in Workflow Migration tool. If upgrading the old server to the latest version, confirm that the old server meets the hardware requirements before upgrading and consult the appropriate [Upgrade GlobalSearch Server](#) and [Upgrade GlobalCapture Server](#) documentation.
4. If upgrading to the latest versions of GlobalSearch and GlobalCapture, download and extract your installation media to the new server. For media and registration serials, please contact Square 9 Fulfillment at fulfillment@square-9.com.

Step 2) Install and Prepare SQL on the Destination Server



Note that this step can be skipped if you are not migrating your SQL Server. Only perform these steps if you do not plan on using the same SQL server as the old GlobalSearch installation.

1. Install Microsoft SQL Server on the destination server. This should be performed separately from the GlobalSearch/GlobalCapture installation. It is recommended that SQL Server Management Studio (SSMS) is also installed, to help with database migration. Media and documentation can be found on [Microsoft's Web Site](#).
 - Express editions of Microsoft SQL Server are fully supported for use with GlobalSearch and GlobalCapture. For a full list of supported SQL editions, please reference our [Infrastructure and Hardware Requirements](#).
 - **Do not run this installation as the SSAdministrator.** Instead, run the installation as an administrative Windows user.
2. Back up your Square 9 databases from the old SQL server to disk as a BAK file. Instructions and documentation can be found on [Microsoft's Web Site](#).
 - Be sure to back up all Square 9 databases for migration. This includes SSMaster, SSProcessing, Square9Users, SSCapture (if using GlobalSearch 4.4 or newer), GetSmart, and any custom databases created with GlobalSearch.
3. Restore the Square 9 databases to the new SQL instance from the BAK files, as documented on [Microsoft's Web Site](#).
4. On the new server, remove all references to the SSAdministrator user and SSAdmin group from the SQL instance security and from the database security for all migrated databases (including any system databases such as master).
 - This can be easily done from SQL Server Management Studio by expanding each database, then navigating to Security > Users. If a login for the SSAdministrator is present, right-click on it and select Delete. Follow the on-screen prompts to complete the deletion.
5. If you are not using the same SQL server as before, edit the values for "ConnectionString" in the tables SSMaster.dbo.ssConnectionStrings and SSCapture.dbo.ssConnectionStrings.
 - For example, if the existing connection string for the GetSmart database says "Data Source=(local)\GETSMART;Initial Catalog=SmartSearch;Integrated Security=SSPI;MultipleActiveResultSets=true;" but the new SQL instance is named "Square9" instead, then the new connection string should say "Data Source=(local)\SQUARE9;Initial Catalog=SmartSearch;Integrated Security=SSPI;MultipleActiveResultSets=true;"
 - Please note that the **only** connection string property that should be edited is "Data Source". All other properties should remain the same. Incorrectly editing this connection string could result in a failed and/or unsupported GlobalSearch or GlobalCapture installation.
 - [Square 9 Support](#) can assist with this step.

Step 3) Perform a Full Server Installation of GlobalSearch and GlobalCapture on the New Server

1. Perform a Full Server installation of GlobalSearch on the new server, as detailed in our [Install GlobalSearch](#) documentation. When prompted, do not select "Complete" for your setup type. Instead, select "Custom".
2. During the installation, you will be prompted if you want to use Active Directory authentication or Local Server authentication, as detailed in our [Install GlobalSearch Server](#) documentation. If you were previously using one authentication type and would like to switch to the other, then all GlobalSearch security would need to be rebuilt. For this reason, it is recommended that the same authentication type is kept.
3. If installing GlobalSearch 4.5.2 or older, do not select "create a new GetSmart database instance." when prompted. Instead, select "Choose an existing SQL instance for use with GlobalSearch".
4. When selecting the SQL instance, choose the new SQL instance containing the migrated SQL databases (or the existing SQL instance if SQL is not being migrated).
 - The installer will recognize that the Square 9 databases are already present and use those during setup.
5. When prompted to enter your registration serial, leave the field empty. Your registration serials will not be valid if they have been used to register a different server. You can still fully install GlobalSearch unregistered.
 - After the migration process is complete, please contact [Square 9 Support](#) for assistance with transferring the registration from the old server to the new server.
6. If you intend to apply a GlobalSearch release update, run the update installer after the GlobalSearch Server installation is complete.
7. Once GlobalSearch is fully installed and updated, begin installing GlobalCapture as appropriate for your version of GlobalSearch. As with the GlobalSearch installation, you must perform a Full Server installation. Do not select any demo options. Your other choices (authentication type, SQL Server, etc.) should be the same as when the GlobalSearch server was installed. Details can be found in our [Install GlobalCapture](#) documentation.
8. If you intend to apply a GlobalCapture release update, run the update installer after the GlobalCapture Server and Engines installations are complete.

Step 4) Migrate Your Documents

1. Copy your documents from the old server on to the new server. By default, these will be kept in C:\GlobalSearch (or C:\SmartSearch if an older version was originally installed). The entire C:\GlobalSearch folder should be migrated.
2. If the file paths on the new server are not the same as the file paths on the old server, then the paths will need to be updated in your SQL databases. (e.g., if they were kept in "C:\GlobalSearch\archive" on the old server but will be kept in "D:\GlobalSearch" on the new server).
 - **This will require the assistance of a Square 9 Support technician. Do not attempt this without assistance from Square 9.** Improperly editing your SQL databases can result in irreversible loss of data or an unsupportable GlobalSearch/GlobalCapture installation.
 - If your image files were kept on a network share using a UNC path, and that path is accessible from the new server, then this step can be skipped.

Step 5) Migrate Your Mapped PDFs for GlobalForms/Frevvo Forms

This only applies to GlobalSearch servers that were importing forms from GlobalForms or Frevvo Forms.

1. On the old server, locate the KAOS folder found in C:\GetSmart. Copy this folder to GetSmart on the new server.

Step 6) Migrate your Mongo Database

GlobalCapture 2.1.1 or later

1. Use the Workflow Migration utility on the old server to export your GlobalCapture workflows and batch history to a file. If you are using GlobalCapture 2.1.2 or later, you can export GlobalAction workflows in the same manner.
2. Import the workflows on the new server, using the same utility.

Full documentation for the Workflow Migration utility: [Transporting Workflows](#)

GlobalCapture 2.1.0 or older and GlobalSearch 4.3.1 or older

Note that these steps only apply to sites using GlobalCapture 2.1.0 or older, or sites using GlobalSearch without GlobalCapture (GlobalSearch 4.3.1 or older).

1. On the old server, locate the "mongodb" folder.
 - By default, this will be in C:\GetSmart. If you are unsure where your mongodb folder is kept, you can confirm this by right-clicking the MongoDB service from the services panel and selecting "Properties" to view the file path.
2. Run command prompt as an administrator on the old server and run the following commands. *Do not copy/paste these commands. Type them out instead.* Be sure to replace the file path to the mongodb folder with the one appropriate for your server.

Administrator Command Prompt

```
cd C:\GetSmart\mongodb\bin
mongodump.exe
```

3. This command creates a folder called "dump" in the bin directory. Copy this folder to the mongodb\bin folder on the new server.
4. On the new server, run the following commands in an administrator command prompt. As before, *do not copy/paste these commands. Type them out instead*. Be sure to replace the file path to the mongodb folder with the one appropriate for the new server.

Administrator Command Prompt

```
cd C:\GetSmart\mongodb\bin
mongorestore.exe
```

5. This will retrieve the contents of the mongodump and import them to the new MongoDB instance.

Note

If migrating GlobalCapture workflows in this manner, the EngineID in the Mongo database will need to be updated to reflect the new server. **This will require the assistance of a Square 9 Support technician. Do not attempt this without assistance from Square 9.** Improperly editing your Mongo databases can result in irreversible loss of data or an unsupported GlobalSearch/GlobalCapture installation.

Step 7) Migrate Your OCR Samples, OCR Templates, and Capture Workflows

GlobalSearch 4.4.0 or newer (GlobalCapture)

This step can be skipped if your OCR templates were migrated using the Workflow Migration Utility in the previous step.

1. On the old server, locate your SampleOCR folder. This can be found in "C:\GlobalCapture\SampleOCR" by default, but may be in "C:\SmartSearch\SampleOCR" or "C:\GlobalSearch\SampleOCR" if an older version was originally installed.
2. Copy this to the same file path on the new server.

Note

This step only migrates the sample files from your OCR templates. The OCR templates themselves are migrated with the SSCapture SQL database, and the workflows are migrated with the Mongo database. It should be noted that samples *are not necessary for OCR templates to function*. They are only used by the OCR template designer, not by the GlobalCapture Engine itself.

GlobalSearch 4.3.1 or older (SmartCapture/Capture Workflow)

1. On the old server, locate the "99" and "13" folders inside "C:\GetSmart". Copy these to "C:\GetSmart" on the new server. These two folders contain your OCR templates and your SmartCapture workflows, respectively.
2. Copy the sample files used in your OCR templates from the old server to the new server. If you cannot locate your original sample files, you can specify new samples on the server.

Note

It should be noted that samples *are not necessary for OCR templates to function*. They are only used by the OCR template designer, not by the Capture Workflow Engine itself.

Step 8) Migrate Additional Files

1. If you are using the Call Assembly feature with GlobalCapture or GlobalAction, copy those to the new server. Consult your assembly file's documentation for file locations.
2. If you are using Assembly Bound Lists, copy the associated DLL files and their parameter XMLs to the new server.
 - If you are upgrading from a 32-bit version of GlobalSearch or GlobalCapture to a 64-bit version, you may also need to download the 64-bit versions of your assembly files. Contact Square 9 Support for assistance with this. Submit a support ticket at www.square-9.com/support if needed.

- GlobalSearch 4.5.2 and GlobalCapture 2.0.1.160 are 64-bit. All older versions of GlobalSearch and older versions of GlobalCapture are 32-bit.

Step 9) Reconfigure Any Customized Features

If your previous installation had any post-install customization, they will need to be reconfigured or reinstalled at this point. Common examples of this include:

- Any sort of custom database scripting or custom integrations with 3rd-party applications.
 - If you have any custom scripting set up by Square 9, please consult with [Square 9 Support](#) before beginning the migration process.
 - If you have any custom scripting set up by a 3rd party vendor or developer, please consult with them for support before beginning the migration process.
- [Enabling Mongo Authentication](#)
- [Switching GlobalSearch or GlobalCapture to use SSL](#)

Step 10) Reinstall the GlobalSearch LAN Clients

If you encounter any issues with clients connecting to the server at this point, follow these steps. You may be able to skip this step if the new server has the same name, IP address, and domain/workgroup as the old server.

1. Uninstall the GlobalSearch LAN client from all Windows workstations.
2. Reinstall the client using the installer from the GlobalSearch server.
 - If migrating to GlobalSearch 5.0.0 or older, the installer will be in the GlobalSearch Client Installation directory on the new server. By default, this is found in "C:\GlobalSearch Client Installation". Follow the instructions in our [GlobalSearch LAN client installation documentation](#).
 - If migrating to GlobalSearch 6.1.0 or newer, the installer will be in the folder "C:\inetpub\wwwroot\Square9API\Desktop_Client\release\setup.exe" or accessible via your web browser at the URL http://<SERVER>/square9api/desktop_client/release/setup.exe. Further details are found in our documentation for [Installing the Desktop Client](#).

Step 11) Finishing Touches

These steps will require the assistance of a Square 9 Support technician. Please go to www.square-9.com/support to submit a ticket, if needed.

1. Transfer the registration from the old server to the new server. If both servers are registered, you may encounter license-related issues when using GlobalSearch or GlobalCapture.
2. Correct file paths and/or connection strings in the migrated SQL databases.
3. Correct the EngineID in Mongo, if the MongoDB was migrated using mongodump/restore.



After the migration is complete, it is recommended that you test your system before pushing things out to production. (i.e. open existing documents, import new documents, test workflows, etc.)

Related articles

- [Licensing & Registration](#)
- [How To Perform a GlobalSearch and GlobalCapture Server Migration](#)
- [Troubleshooting GlobalSearch Extensions](#)
- [How To Recreate GlobalSearch and GlobalCapture Services](#)
- [How To Enable Caching Options in GlobalCapture](#)