



April 2005

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# WorkflowXtender™

## Migrating the Workflow Database

### Migration Guide

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*Migrating the Workflow Database*

April 2005

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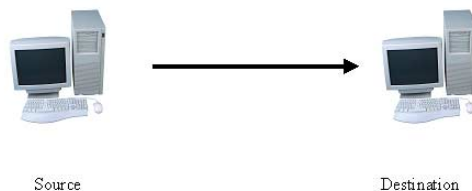
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# Migrating to the Workflow Database

## Introduction

The purpose of this guide is to walk you through the steps required to migrate an existing workflow (WfX) database referred to as "Source" to a new database referred to as "Destination." If the steps are completed accurately, all of a workflow user's work will be migrated, existing instances will remain operational, and logins and roles will be migrated. Please ensure that all of the requirements listed are satisfied before starting the migration.

**Figure 1. Migration Diagram**



The following lists the phases of the migration:

- Upgrade Source - To ensure an accurate migration, you must first upgrade the source database to match the destination.
- Install Destination - Install the workflow software on your destination machine.
- Copy the data - Use SQL2000 utility to copy all of the data from the source to the destination.
- Reboot - There is some data that gets cached. You must reboot for the migration to be complete.

## Requirements

You must use the same source database names for the destination databases. There are a number of references to the database names in the stored procedures and triggers. If you do not use the same database names, you will have to manually edit every stored procedure and trigger to change the database names.

## Assumptions

The following procedures assume that you are installing on SQL 2000.

## Phase 1: Upgrade Source Database

The workflow source database must first be upgraded to the latest version of workflow before it can be migrated to the destination database.

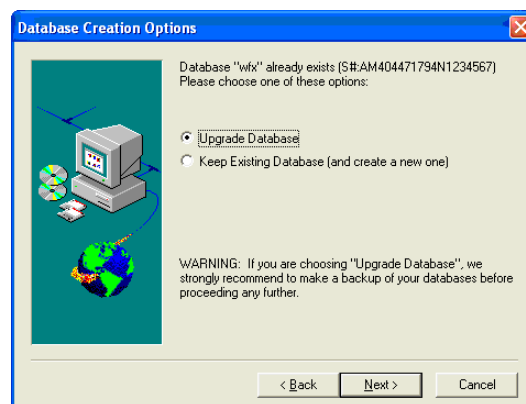
To upgrade:

- Install the latest version of WfXPM.exe on the source machine. Detailed instructions can be found under the heading "Installing the WorkflowXtender Process Manager" in chapter 2 of the Workflow Administrators Guide.



**Important:** You must choose Upgrade Database when you are prompted to either upgrade the existing database or create a new database.

Figure 2. Database Creation Options Dialog Box



## Phase 2: Install Process Manager on the Destination Server

Install the latest version of WfXPM.exe on the destination server. Detailed instructions can be found under the heading "Installing the WorkflowXtender Process Manager" in chapter 2 of the Workflow Administrators Guide.

**Note:** It is important that you name your destination active (usually 'wfx') and archive database (usually 'wfxarch') the same as they are on the source. (If the destination server is a cluster, make sure you follow the proper procedures detailed in the Cluster Installation Guide.)

## Phase 3: Run Data Transformation Services (DTS)

Now that the source and destination have the same version of the software, you must run DTS on the destination server to migrate all the data in the tables from the source to the destination. You must run through these steps twice; first on the active database (usually 'wfx'), then on the archive database (usually 'wfxarch').

To run DTS:

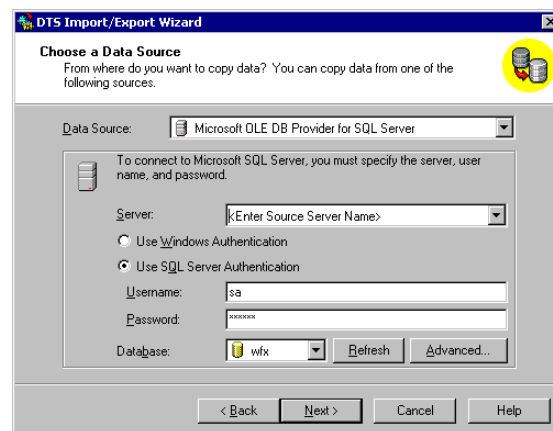
1. Open up Enterprise Manager on the destination machine.
2. Under the Tools menu, choose Data Transformation Services, and then choose Import Data... The DTS Import/Export Wizard appears.

**Figure 3. DTS Import/Export Wizard - Welcome Page**



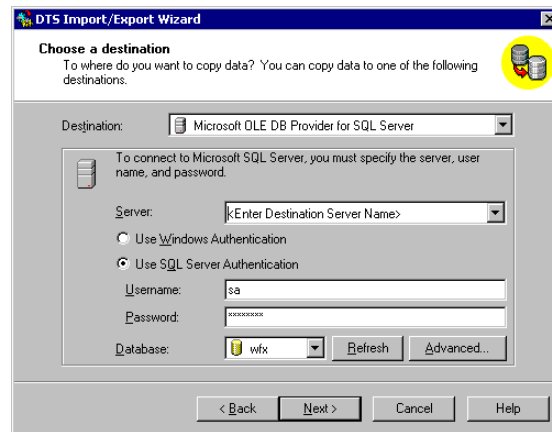
3. Click Next. The Choose a Data Source page appears.

**Figure 4. DTS Import/Export Wizard - Choose a Data Source Page**



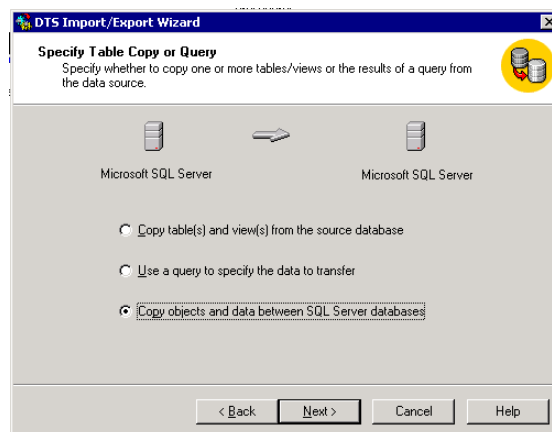
4. Enter the server name, database, and credentials of the source workflow database. If this is the first time through, choose the active workflow database (usually 'wfx'). Click Next. The Choose a destination page appears.

**Figure 5. DTS Import/Export Wizard - Choose a Destination Page**

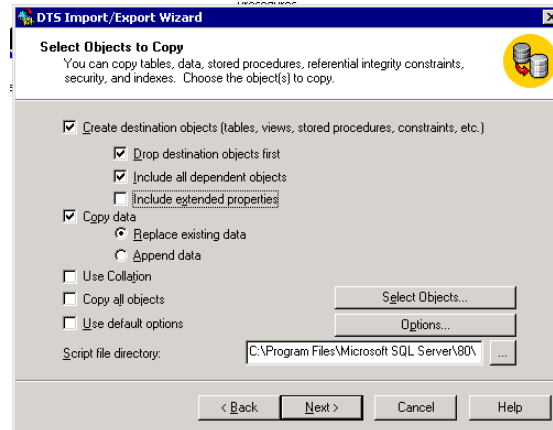


5. Enter the server name, database and credentials of the destination workflow database. (If the destination is a cluster, make sure you use the virtual name of the SQL server.) Click Next. The Specify Table Copy or Query page appears.

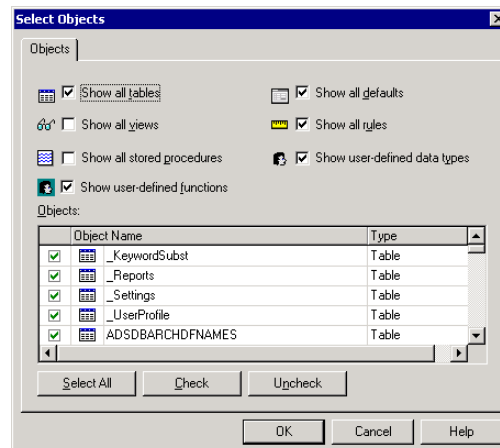
**Figure 6. DTS Import/Export Wizard - Specify Table Copy or Query Page**



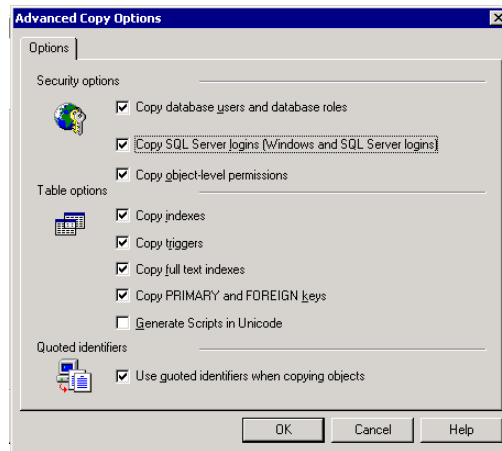
6. Choose the last radio button, "Copy objects and data between SQL Server databases". Click Next. The Select Objects to Copy page appears.

**Figure 7. DTS Import/Export Wizard - Select Objects to Copy Page**

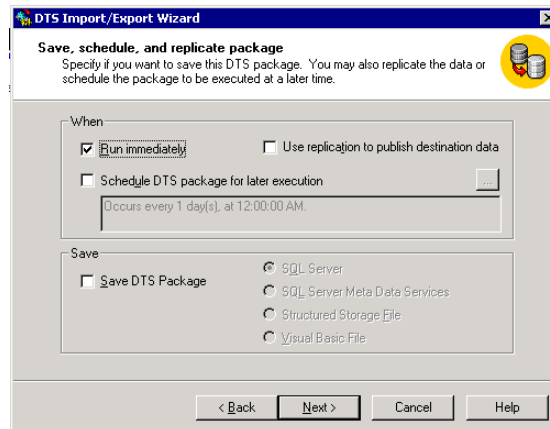
7. Configure the check box options according to Figure 6 above. Click the Select Objects... button. The Select Objects dialog box appears.

**Figure 8. Select Objects Dialog Box**

8. 8. Configure the check box options at the top of the page according to Figure 7 above. For the Objects list, we want to select and check all tables except for "CONFIGINFO" and "MGRCONFIGINFO". The easiest way to do this is to click the Select All button, then click the Check button, then scroll down in the list view and uncheck the two tables "CONFIGINFO" and "MGRCONFIGINFO". Click OK. Now Click the Options... button. The Advanced Copy Options dialog box appears.

**Figure 9. Advanced Copy Options Dialog Box**

9. Configure the check box options according to [Figure 9 on page 11](#). Click OK. Now Click Next. The Save, schedule, and replicate package page appears.

**Figure 10. DTS Import/Export Wizard - Save, Schedule, and Replicate Package Page**

10. Be sure the Run immediately check box is enabled, click Next. The Completion page appears.

**Figure 11. DTS Import/Export Wizard - Completion Page**

11. Click Finish.

You must now run DTS on the archive workflow database, which means running through steps 1-11 again but using the name of the archive workflow database (usually 'wfxarch') instead of the active workflow database.

## Phase 4: Reboot Destination Server

Once you have completed all of the steps, you must reboot the machine to clear any data that may have been cached.