# Considerations

## Precautions

When restoring mdb from your prod to swing, make sure your swing environment does not start consuming incoming emails from your prod maileater mailbox. Also on the swing box you might want to disable outgoing emails or at least change the “from” address, to avoid user confusion. See details below.

## EEM

I have very few notes on EEM here. We don’t use EEM authentication for SDM at all, but we have to have it because APM requires it. Not sure if it is possible to have SDM installed without EEM present.

In my case, I switched to OS authentication after the 12.9 install and kept it that way.

## Code Migration

There is a code migration utility included with install (at least there was for 17.0). I did run it on the initial run upgrading from 12.9 to 17.2, but it I ended up doing manual review anyway.

# Initial Run Only

## Copy 17.2 installation media to Swing-APP

Also copy any Cumulative updates and test fixes installed in prod on top of 17.2

## Stop SDM Service and set it to manual start up

## Create Swing MDB back up SNAPSHOT\_NUMBER\_6\_Ready\_for\_migration.bak

## Copy site\mods from 12.9 prod to Swing-App

## Create Swing-App Server Snapshot Number 6

(Ready for migration to 17.2)

# Consecutive Test Runs: Revert Swing to 12.9

1. Check if the current version is 12.9
2. If the current version is NOT 12.9:
	1. Revert Swing-App server to snapshot Number 6 (Ready for migration to 17.x)
	2. Restore mdb from SNAPSHOT\_NUMBER\_6\_Ready\_for\_migration.bak
3. Check for and Install Windows patches
4. Re-create server snapshot (to include new Windows patches and refresh it in general)

# BRING PRODUCTION 12.9 MDB TO SWING-DB

## Stop and Set SDM Service startup mode to Manual on the swing server

## Login to Swing-DB and start MS SQL Management Studio

## Check for duplicates in the current 12.9 production MDB

Logon to the 12.9 production database SQL server and open SQL Management Studio

Run the **script SQLCheckr12UniqueIndexes.sql** in the installation media at [\\Swing-APP\f$\Install\_SDM\_17\_2\products\SDM\Migrate\**SQLCheckr12UniqueIndexes.sql**](file:///%5C%5Cwhqcasdm-swing%5Cf%24%5CInstall_SDM_17_2%5Cproducts%5CSDM%5CMigrate%5CSQLCheckr12UniqueIndexes.sql)

## Copy the latest full mdb backup from prod 12.9 to Swing-DB

## Copy the certificate file and the private key files

This is only needed if mdb is encrypted with TDE

**Note:** this was only needed the very first run. For all future runs just compare the dates and make sure the cert files have not changed

## Restore 12.9 production mdb to Swing-DB

### INITIAL RUN ONLY: Create a master key

This is only needed if mdb is encrypted with TDE

USE master

GO

CREATE MASTER KEY ENCRYPTION BY PASSWORD = ' [MK PW] '

GO

**Note:** [MK PW] is any password you create, does not have to match [PK PW]

**Note:** don’t need to drop it and redo if already exists

### INITIAL RUN ONLY: Recreate the server certificate

This is only needed if mdb is encrypted with TDE

Recreate the server certificate by using the original server certificate backup file. The password must be the same as the password that was used when the backup was created.

CREATE CERTIFICATE SDMCert

FROM FILE = 'g:\backups\_to\_keep\SDM.certbak'

WITH PRIVATE KEY (FILE = 'g:\backups\_to\_keep\SDM.pkbak',

DECRYPTION BY PASSWORD = 'XXXXXXXXX');

### Restore mdb from prod 12.9 backup

### Change recovery model to Simple

## Disable all mailboxes to avoid consuming production email

**update mdb.dbo.usp\_mailbox set del=1,userid=NULL**

## Disable email notifications for all users

**update mdb.dbo.usp\_contact set c\_cm\_id1=null, c\_cm\_id2=null, c\_cm\_id3=null, c\_cm\_id4=null**

## Restore SDM orphaned users

**Note:** make sure all records in usp\_mailbox has been inactivated:
select \* from mdb.dbo.usp\_mailbox -- del=1 should be for all (2) records

use mdb
go
exec sp\_change\_users\_login 'AUTO\_FIX','ServiceDesk'

# Reconfigure SDM 12.9 for local server

## Keep SDM servicer stopped

## Run pdm\_configure as admin

### On the Database config screen

**DO NOT SELECT TO LOAD DEFAULT DATA**

 \*\****In the configuration wizard when you click "next" at the database section it will pop up a box saying that "this database was previously configured to be used by server ... are you sure you want to configure it" - click "OK" - this is only because you restored the MDB from a different environment.***

## Enable Pass-through Authentication

In IIS: For CAisd web app: Enable Windows and Disable Anonymous authentication

## Make Sure SDM service started

## Bring up SDM GUI

Just to see it come up

# CONFIGURE SDM WITH CUSTOM DATA SCHEMA AND CODE

## Publish the custom schema

1. Start Web Screen Painter as an admin
2. Bring up Schema Designer and select Save and Publish from the file menu
3. Close WSP and stop SDM service
4. In admin command prompt:
pdm\_publish
5. Start SDM service

## Login into SDM Web GUI

### Configure maileater

1. Fill in maileater user name and PW (make sure it is NOT the same as prod)
2. Make the mailbox active

### Configure outgoing email options

E.g.: mail\_from\_address, etc

### Modify Attachment Servlet Path

Administration > System > Servers

Change the path from prod to swing

### Restart SDM Service

### Test SDM

# UPGRADE SWING TO 17.2

## Stop SDM service on Swing-APP and set to manual startup

## Make sure 2 EEM services are running

CA Directory – itechpoz

CA iTechnology iGateway 4.7

## Make sure Short File (8dot3) Name is enabled

1. Make sure 8.3 File Name Creation is enabled running this command at the admin Command Prompt:
fsutil.exe 8dot3name query
fsutil.exe 8dot3name query C:
fsutil.exe 8dot3name query F:
2. If not:
	1. Enable 8.3 File names:
	Run in admin Command Prompt:
	fsutil.exe behavior set disable8dot3 0
	2. Check if F:\Program Files (x86) has a short name
	dir f:\PROGRA~1
	or
	dir f:\ /X
	3. If not, Assign short name to F:\Program Files (x86)
	Run in admin Command Prompt:
	C:\Windows\System32\fsutil file setshortname "F:\Program Files (x86)" PROGRA~1
	4. Make sure both the **TEMP** and **TMP** environment variables are set to a short file name, e.g. c:\temp
	Windows Right-click menu > System > Advanced System Settings > Environment Variables.
	5. Restart the server if made changes to the short names

## Run SDM 17.2 install

Run setup.exe from admin cmd

## Run pdm\_configure

## Recreate keystore for maileater

If @NX\_KEYSTORE\_REF is gone from NX.env (deleted by pdm\_config):

delete nx.keystore file in F:\Program Files (x86)\CA\Service Desk Manager\pdmconf and restart maileater process (or SDM)

## Clear IE browser cache on the test PC

## TEST SDM

# Install cumulative patches and test fixes

Whatever you have in prod that was installed on top of 17.2

# Initial run only: redo customizations

Review files in site\mods and re-apply custom code using to 17.2 Out of the box files as a base.

Test SDM.

Preserve site\mods outside of the server in case you want to revert back to 12.9 for test runs

# Create swing mdb back up for 17.2

# RESTORE SWING to 12.9

**Note:** do this step at the end of each test run (make sure first you got the custom files converted and preserved outside of the server the first time around) to make sure you have Swing Environment 12.9 available for the go-live. Also do it after go live just in case.