



DISASTER RECOVERY MANUAL

organise*it* DISASTER RECOVERY MANUAL

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
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

HOW TO READ THIS MANUAL

This manual uses the following conventions to describe, identify and highlight terms and operating procedures.

Keys

The keyboard keys are used in the text to describe many computer operations. Icons identify the key as they appear on the keyboard, when used in procedures. For example  identifies the [Enter] key. When keyboard keys are referred to in body text of the document, they will be identified in text, such as [Back] or [Next].

Key Operations




Some of the operations require you to simultaneously use two or more keys. We identify such operations by an icon of the key separated by a plus sign (+). For example,  +  indicates that you must hold down the [Ctrl] key on the keyboard and at the same time press the letter [C].

If three keys are used, hold down the first two keys and then press the third key. Be careful to only press the third key once; do not hold it down also, as this will repeat the action.

ABC When procedures require an action such as entering text, the text you are to type is represented in the type face you see to the left.

ABC When procedures require an action such as selecting an item (perhaps from a list) or ticking/un-ticking an option, then the label against such an option is represented in the type face you see on the left.

Buttons

The buttons will be shown as an image. For example the [Next] button will be indicated by . If a button has a shortcut key then the letter of the button is underlined. For example, the letter *N* in the [Next] button is underlined, indicating that the button can be invoked by pressing  + .

Messages

Messages are used in this manual to bring important information to your attention. Each type of message is identified as:

CAUTION: Pay attention! A caution informs you that improper use of software or failure to follow instructions may cause data loss.

NOTE: *Please read. A note is a hint or advice that helps you make best use of the software and/or it may also inform about the changes (addition or modification) that the software has carried out to the environment and may be important for proper running of the software.*

INTRODUCTION:

DISASTER RECOVERY

This manual will describe what one should do, with respect to the *organiseit* components, in the case of a disaster.

This includes the following *organiseit* client components:

- *organiseit* Main Module
- Administration Module
- Import Wizard Module
- *organiseit* PDF printer

and also includes the following *organiseit* server components:

- *organiseit* Web Service
- *organiseit* Monitoring Service
- *organiseit* Database

CHAPTER 1:

RECOVERING THE *organiseit* CLIENT COMPONENTS

This chapter looks at recovering the:

- *organiseit* Main Module
- Administration Module
- Import Wizard Module
- *organiseit* PDF printer

1.1 RECOVERING THE CLIENT COMPONENTS

organiseit client components do not hold any data, nor does it record any data other than a few User Preferences on the machine on which it is installed. Under such circumstances it is more appropriate to re-install these components. The User Preferences are lost only when the machine, on which the components were earlier installed, is re-built. If the operating system is not re-installed and only the organiseit components are being installed, then you would be able to retain your User Preferences, as they are stored in **HKEY_CURRENT_USER\SOFTWARE\OrganiseIT\organiseit**.

NOTES:

During installation of the client components (viz. organiseit Main Module, Administration Module and Import Wizard) the installation program will ask for the organiseit security URL. It is looking for a file called **oitWebServer.ini**. The URL is stored in this file during the installation of the web services. This is the URL of the organiseit Web Services.

The URL can be found at the following location:

- 1 The URL is stored in the registry of the machine on which the client or Web Service component is installed. It is stored in **HKEY_LOCAL_MACHINE\SOFTWARE\OrganiseIT\organiseit**. The key is **oitWebSecurityURL**. If there is another machine on the network in which the client or Web Service component is already installed, and the components are working fine, then copy the URL from that machine and type in the URL in the machine on which the component is currently being installed
- 2 The **oitWebServer.ini** can be found in the root directory of the C:\ drive, on the machine on which you have installed the organiseit web service component. It can also be found in the **oitServerSetup** directory of the organiseit **Installation** folder or disc
- 3 To locate the URL:
 - I. Open up **IIS** on the machine on which the organiseit web services is installed
 - II. Locate the virtual directory called **oitWeb** (by default the virtual directory is installed under **Default Web Site**)
 - III. Select the virtual directory **oitWeb** and you will find a list of files on the right-hand side
 - IV. Right-click on the file **oitWebSecurity.asmx** and select **Browse** - this will load that file on your browser
 - V. Copy the URL that you see in your browser

If the URL has the word localhost, then replace it with the machine name or IP address of the machine on which this Web Service is installed. Include the port number if that appears in the URL...
 - VI. Type in this URL on the machine on which the client component is being installed

NOTE: Refer to the **organiseit Installation Manual** for detailed instructions on installation

CAUTION: If you use the Registry Editor incorrectly, you may cause serious problems that may require you to re-install your operating system. Organise IT Pty Ltd cannot guarantee that you can solve problems that result from using Registry Editor incorrectly. Use the Registry Editor at your own risk

CHAPTER 2:

RECOVERING THE *organiseit* SERVER COMPONENTS

This chapter looks at recovering the:

- *organiseit* Web Services
- *organiseit* Monitoring Services
- *organiseit* Database

2.1 RECOVERING THE organiseIT WEB SERVICES

organiseit web services do not hold any data nor does it record any data on the machine on which it is installed. Under such circumstances it is more appropriate to re-install the component. On successful installation of the web service, the file *oitWebServer.ini* is created in the root folder of the C:\ drive as well as in the *oitServerSetup* directory, located under the organiseit *Installation* folder. The file, *oitWebServer.ini*, contains the URL for the organiseit web services.

NOTE: Update the registry of the machine, on which the organiseit client component is installed, with this URL

To locate the URL:

- 1 In the file, *oitWebServer.ini*, look for the string: **##oitWebSecurityURL\$\$**
- 2 Copy the complete URL starting with **http://** (which is found immediately after the string **##oitWebSecurityURL\$\$**)

This URL is to be copied into the registry of the machines on which the client component is installed. The path to the registry is: **HKEY_LOCAL_MACHINE\SOFTWARE\OrganiseIT\organiseit**. The key is **oitWebSecurityURL**.

2.1.1 Installed Web Services on a Peer-Peer Setup

I have installed web services on a Peer-Peer Setup and:

- I. the organiseit web services and organiseit database are on the same machine
 - a. Reset the password of your local user **oitWebUser** on the machine on which you have installed the organiseit database (for more information on resetting a password of a local user, refer to your *Operating System Documentation*)
 - b. Open up **IIS** and locate the virtual directory **oitWeb**. This virtual directory hosts the organiseit web services. In a default installation, the virtual directory will be created under **Default Web Site**
 - i. Right-click on the virtual directory **oitWeb** and select **Properties**
 - ii. Click on the **Directory Security** tab
 - iii. Click on **Edit** under **Anonymous Access and Authentication Control**
 - iv. Reset the password of **oitWebUser** - it must be the same as that specified in I(a)
 - v. Restart **IIS**

NOTE: Some of the steps mentioned above might vary from operating system to operating system. Basically, what is to be done is to reset the password of the user **oitWebUser**, under whose context the organiseit web service runs

- II. the organiseit web services and organiseit database are on different machines
 - a. Reset the password of your local user **oitWebUser** on the machine on which you have installed the organiseit database (for more information on resetting a password of a local user, refer to your *Operating System Documentation*)
 - b. Open up **IIS** in the machine on which you have installed the organiseit web services and locate the virtual directory **oitWeb**. This virtual directory hosts the organiseit web services. In a default installation, the virtual directory will be created under **Default Web Site**

- i. Right-click on the virtual directory *oitWeb* and select **Properties**
- ii. Click on the **Directory Security** tab
- iii. Click on **Edit** under **Anonymous Access and Authentication Control**
- iv. Reset the password of *oitWebUser* - it must be the same as that specified in II(a)
- v. Restart **IIS**

NOTE: Some of the steps mentioned above might vary from operating system to operating system. Basically, what is to be done is to reset the password of the user *oitWebUser*, under whose context the organiseit web service runs

2.1.2 Installed Web Services in a Workgroup Setup

I have installed web services on a Workgroup Setup and:

- I. the organiseit web services and organiseit database are on the same machine
 - a. Reset the password of your local user *oitWebUser* (for more information on resetting a password of a local user, refer to your **Operating System Documentation**)
 - b. Open up **IIS** and locate the virtual directory *oitWeb*. This virtual directory hosts the organiseit web services. In a default installation, the virtual directory will be created under **Default Web Site**
 - i. Right-click on the virtual directory *oitWeb* and select **Properties**
 - ii. Click on the **Directory Security** tab
 - iii. Click on **Edit** under **Anonymous Access and Authentication Control**
 - iv. Reset the password of *oitWebUser* - it must be the same as that specified in I(a)
 - v. Restart **IIS**

NOTE: Some of the steps mentioned above might vary from operating system to operating system. Basically, what is to be done is to reset the password of the user *oitWebUser*, under whose context the organiseit web service runs

- II. the organiseit web services and organiseit database are on different machines
 - a. Reset the password of your local user *oitWebUser* on the machine on which you have installed the organiseit database (for more information on resetting a password of a local user, refer to your **Operating System Documentation**)
 - b. Open up **IIS** on the machine on which you have installed the organiseit web services and locate the virtual directory *oitWeb*. This virtual directory hosts the organiseit web services. In a default installation, the virtual directory will be created under **Default Web Site**
 - i. Right-click on the virtual directory *oitWeb* and select **Properties**
 - ii. Click on the **Directory Security** tab
 - iii. Click on **Edit** under **Anonymous Access and Authentication Control**
 - iv. Reset the password of *oitWebUser* - it must be the same as that specified in II(a)
 - v. Restart **IIS**

NOTE: Some of the steps mentioned above might vary from operating system to operating system. Basically, what is to be done is to reset the password of the user *oitWebUser*, under whose context the organiseit web service runs

2.1.3 Installed Web Services in a Domain Setup

If you have installed web services on a domain setup and irrespective of whether the web services and database are on the same machine or different machine:

1. Reset the password of your active-directory user **oitWebUser** (for more information on resetting a password of a local user, refer to your *Operating System Documentation*)
2. Open up **IIS** in the machine on which **organiseit** web services is installed and locate the virtual directory **oitWeb**. This virtual directory hosts the **organiseit** web services. In a default installation, the virtual directory will be created under **Default Web Site**
 - i. Right-click on the virtual directory **oitWeb** and select **Properties**
 - ii. Click on the **Directory Security** tab
 - iii. Click on **Edit** under **Anonymous Access and Authentication Control**
 - iv. Reset the password of **oitWebUser** - it must be the same as that specified in (1)
 - v. Restart **IIS**

NOTES:

- Some of the steps mentioned above might vary from operating system to operating system. Basically, what is to be done is to reset the password of the user **oitWebUser**, under whose context the **organiseit** web service runs.
- Refer to the **organiseit Installation Manual** for detailed instructions on installation.
- During installation of the web service component, the installation program will ask for the **Database Server** on which the **organiseit** database resides. It is looking for a file called **oitDatabaseServer.ini**. The name of the server is stored in this file during the installation of the **organiseit** database component. If the database is installed on the default SQL Server instance, then the name of the database server is the same as the machine name. If the database is installed on a named instance, then the name of the database server is **<Machine Name>\<Instance Name>**

e.g. if the SQL Server is the default instance on a machine named **Melbourne-Server**, then the value of **oitDatabaseServer** is **Melbourne-Server**. If the SQL Server instance on which **organiseit** is recovered is a named instance **oit** and is on the **Melbourne-Server**, then the value of **oitDatabaseServer** is **Melbourne-Server\oit**.

Additionally, if the SQL Server is not listening on the default port, then type in the port number as well.

e.g. if SQL Server is listening on port **1000**, then the format should be **Melbourne-Server, 1000**

The **oitDatabaseServer.ini** file can be found at the following location:

- In the root directory of your C Drive of the machine on which you have installed **organiseit** web service component
- It can also be found in the **oitServerSetup** directory of the **organiseit Installation** folder or disc

CAUTION: If you use the Registry Editor incorrectly, you may cause serious problems that may require you to reinstall your operating system. Organise IT Pty Ltd cannot guarantee that you can solve problems that result from using the Registry Editor incorrectly. Use the Registry Editor at your own risk

2.2 RECOVERING THE organiseit MONITORING SERVICES

organiseit monitoring services do not hold any data; it only records errors that are encountered during the processing of XML files in the event log *oitEventlog*. The error log can always be rebuilt by processing the same XML files once again. Under such circumstances it is more appropriate to re-install the component. The event log *oitEventlog* will be recreated during installation of the component.

CAUTION: Stop the monitoring service if it is running and do not restart the service until the mappings are verified

2.2.1 To Verify the Mappings

- 1 After installation of the monitoring services, log in to the **Monitoring Services Configurator Module**
- 2 Go through the list of active mappings - the details of which are fetched from the organiseit database
- 3 Verify that the paths mentioned in the mappings are accessible and correct
- 4 If any of the paths is no longer accessible, or is not correct, make the appropriate changes to the mappings

NOTE: Update the record with the appropriate Path instead of creating a new record

- 5 Save the changes
- 6 Restart the service

NOTE: Refer to the **organiseit Installation Manual** for detailed instructions on installation

2.3 RECOVERING THE organiseit DATABASES

The key to recovering organiseit databases is to implement a backup strategy for the SQL Databases. Ideally you must have a full backup scheduled to be done every day and have the transaction log backed up frequently. The frequency of backing up the transaction log has to depend on the critical nature of your business. Backing up the transaction log every 15 minutes will lead to losing only 15 minutes of data activity. The frequency can be set for 5 or 10 minute intervals also.

CAUTION: The collation sequence in SQL Database is important; once a database is created using a collation sequence (which is normally the collation sequence of the SQL Server instance, unless a different collation is selected at the time of creation of the database), the sequence has to be maintained throughout the life of the database. Changing the collation sequence is not an easy task. So it is important that in the event of a crash or upgrade of hardware, that when the SQL Server is re-installed, the collation sequence be kept the same as that of the old instance.

2.3.1 Recovering organiseit databases using the SQL Server's Attach Database option

To recover using this option you will need the latest .MDF file of all the organiseit databases from the previous instance. If the .MDF file of even just one organiseit database is not available, then this method of recovery **must not be used**. Also, if the .MDF files are not the latest ones, then again this method of recovery **must not be used**. If the previous instance is still up, then it would be advisable that before moving the .MDF file, the organiseit databases be detached from that instance of SQL Server.

- 1 Install SQL Server, keeping the collation sequence the same as that of the earlier Instance. If the collation sequence is not the same, then re-install or use the **Rebuild Master** utility to change the collation sequence of the SQL Server instance (for more information on how to change the collation sequence after Installation, refer to the **SQL Server Documentation**)

NOTE: It is important to maintain the same collation sequence as that of the old instance

- 2 Install the organiseit database component
- 3 Delete the **oit_master** database that is created during installation of the organiseit database component in the new instance of SQL Server
- 4 Attach all of the organiseit databases (including **oit_master**) into the new instance by using the **Attach Database** option. While attaching, **oitWebUser** must be made the owner of these databases
- 5 Once all of the organiseit databases are attached, open each of these databases in **Enterprise Manager / Management Studio**, click on **Users** under each of these **Databases** and delete all the users that appear on the right-hand side, except **dbo**

This step is to be carried out for each of the organiseit databases...

- 6 Send the following details to Organise IT Pty Ltd and you will receive scripts from them with instructions on how to execute those scripts. The details required are:
 - a. the **Name** of all the organiseit databases (as they appear in SQL Server)
 - b. the **SQL User** for the organiseit databases (the default user is **oit**)
 - c. the **Login name** for **oitDmnGroup** and **oitWebUser**

You can find that by starting Enterprise Manager or Management Studio and then select Security > Logins. On the right-hand side you will see a list of logins. The complete name has to be provided, which will be in the format <Machine Name>\oitWebUser or <Domain Name>\oitWebUser...

- 7 Once you receive the scripts from Organise IT Pty Ltd, execute them as instructed

- 8 Your organiseit databases are now ready
- 9 Execute the **DBCC CHECKDB** command against each of the organiseit databases before you start using it, to verify that the databases are intact
- 10 Set up a **Backup and Optimisation** plan for these databases

2.3.2 Recovering organiseit Databases using the SQL Server's Restore Database Option

To recover using this option you will need the latest backups of all the organiseit databases from the previous instance. If the backup file of even just one organiseit database is not available, then this method of recovery **must not be used**. Also, if the backup files are not the latest ones, then again this method of recovery **must not be used**. If the previous instance is still up, then it would be advisable that the organiseit databases be backed up and then use that backup set for restoring on the new instance of SQL Server.

- 1 Install SQL Server, keeping the collation sequence the same as that of the earlier Instance. If the collation sequence is not the same, then re-install or use the **Rebuild Master** utility to change the collation sequence of the SQL Server instance (for more information on how to change collation sequence after Installation, refer to the **SQL Server Documentation**)

NOTE: It is important to maintain the same collation sequence as that of the old instance

- 2 Install the organiseit database component
- 3 Delete the **oit_master** database that is created during installation of the organiseit database component in the new instance of SQL Server
- 4 Restore all organiseit databases (including **oit_master**) into the new instance by using the **Restore Database** option
- 5 Once all of the organiseit databases are restored, open each of these databases in **Enterprise Manager or Management Studio**, click on **Users** under each of these **Databases** and delete all the users that appear on the right-hand side, except **dbo**

This step is to be carried out for each of the organiseit databases...

- 6 Send the following details to Organise IT Pty Ltd, and you will receive scripts from them with instructions on how to execute those scripts. The details required are:
 - a. the **Name** of all the organiseit databases (as they appear in SQL Server)
 - b. the **SQL User** for the organiseit databases (the default user is **oit**)
 - c. the **Login name** for **oitDmnGroup** and **oitWebUser**

You can find that by starting Enterprise Manager or Management Studio and then select Security > Logins. On the right-hand side you will see a list of logins. The complete name has to be provided which will be in the format <Machine Name>\oitWebUser or <Domain Name>\oitWebUser...

- 7 Once you receive the scripts from Organise IT Pty Ltd, execute them as instructed
- 8 Your organiseit databases are now ready
- 9 Execute the **DBCC CHECKDB** command against each of the organiseit databases before you start using it, to verify that the databases are intact
- 10 Set up a **Backup and Optimisation** plan for these databases

After recovering the databases, you are required to modify the registry settings on the machine on which organiseit web services is installed.

The registry is to be edited to add the name of the SQL Server instance. The path to the registry is: **HKEY_LOCAL_MACHINE\SOFTWARE\OrganiseIT\organiseit** and the key is **oitDatabaseServer**.

Type in the name of the SQL Server instance, on which the organiseit database is recovered. If it is the default instance on a machine, then type in the machine name. If it is a named instance, then the string will be in the format **<Machine Name>\<Instance Name>**.

e.g. if the SQL Server is the default instance on a machine named **Melbourne-Server**, then the value of **oitDatabaseServer** is **Melbourne-Server**. If the SQL Server instance on which organiseit is recovered is a named instance **oit** and is on the **Melbourne-Server**, then the value of **oitDatabaseServer** is **Melbourne-Server\oit**.

If you have installed organiseit web services on more than one server, then update the registry of all those servers.

NOTE: Refer to the **organiseit Installation Manual** for detailed instructions on installation

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