

LifeCheck Technical Note

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Description: Changing Databases

The purpose of this technical note is to detail the ways in which the LifeCheck database can be moved to another database server or a new blank database created.

Introduction

LifeCheck has a variety of ways in which you can

- Connect to a different database and/or server
- Move your database to another server / named database
- Create a new blank database

All of these mechanisms make use of the **Administration > Remote Database** option within LifeCheck and all operate in a similar way by using the **Change Database** option.

Change database allows you to connect to a different database server and/or database and optionally allows you to create a new database and if required copy your existing data to the new database.

Backup

As with all database operations, the first task is to ensure that you take a backup of your existing database. This has 2 advantages, firstly it acts as a fall-back position just in case an error occurs and secondly the backup can be restored on the target server avoiding the need for LifeCheck itself having to copy the data.

Working from a backup

The simplest approach is to use the backup created in the previous stage as the new database. To do this, copy the database backup file from the existing server to the new server and restore using Microsoft SQL Server Management Studio. This should work assuming the version of SQL Server on the new server is equal to or greater than that on the existing server. Once restored, ensure you have an SQL Login which has read/write access to the new LifeCheck database as this will be needed in the next step.

Connecting LifeCheck to the new Database

Start LifeCheck and login under the Administrator user. Now select the **Administration > Remote Database** option from the main menu. Click the **Change Database** button to invoke the wizard. The

first window shown is simply a Welcome screen so click **Next** to proceed to the next screen as shown below :-

The screenshot shows the 'Change Database Wizard' window with the title 'Select Database Type.' and the instruction 'Choose the type of SQL Server database you would like to use.' Below this, it asks the user to select whether to connect to an existing database or create a new one. The 'Connect to an existing database' option is selected. The 'Server Name' field contains 'NEW-SERVER\SQLEXPRESS' with a hint 'eg COMPUTER\SQLINSTANCE'. The 'Authentication Type' is set to 'SQL Server Authentication'. The 'User Name' is 'lifecheck' and the 'Password' is masked with asterisks. The 'Database Name' is 'lifecheck'. There is a 'Test Connection' button. At the bottom are '< Back', 'Next >', and 'Cancel' buttons.

Select **Connect to an Existing Database** and enter the name of the new SQL Server instance. In most cases you should set the **Authentication Type** to **SQL Server Authentication** although your system administrator may require **Windows Authentication**. If SQL Server authentication is set, enter the SQL Server credentials to be used as **User Name** and **Password**. The default database name is normally **lifecheck** however you may have specified a different name when restoring your database initially so enter the name as required.

Click **Test Connection** to validate the data entered and attempt to connect to the new server and to the database previously restored. The following results may occur but note this may take a minute or two to complete.

1. Failed to connect to Microsoft SQL Server

This could occur if you have not specified the correct name for the SQL Server, the SQL Server is not network visible or the SQL login credentials specified are not correct. Validate the information entered and try again.

2. Connection to the server was established but the named LifeCheck database was not found

This could occur if the named database does not exist on the specified SQL Server. Check the name and try again. If you are not using the backup file approach, this could be a valid message. Check the following **Creating a new Database** section.

3. Database connection was successful

This is what you want to see (assuming you are working from a backup) and indicates the connection to the new SQL Server succeeded and the LifeCheck database was found. Click OK and then **Next**. On the following screen click **Next** again and finally **Finish**. LifeCheck will restart and will be connected to the new database. To confirm this, select the **Administration > Remote Database** option from the main menu again and verify the value displayed under **Factory Database Server** points to the new server.

Creating a new Database

While it is recommended to work from a restored backup file as detailed above, it is also possible to perform the whole operation from within LifeCheck using the same remote database option. The differences from the steps listed above are detailed here.

On entry to the wizard, now select the **Create a New Database** option and enter the server instance name and SQL login credentials as shown below.

The screenshot shows the 'Change Database Wizard' dialog box, specifically the 'Select Database Type' step. The title bar reads 'Change Database Wizard' with a close button (X). The main heading is 'Select Database Type.' with a subtitle 'Choose the type of SQL Server database you would like to use.' Below this, a message states: 'Please select whether you would like to connect to an existing database or create a new one.' There are two radio buttons: 'Create a new database' (selected) and 'Connect to an existing database'. The 'Server Name' field contains 'NEW-SERVER\SQLEXPRESS' with a browse button (three dots) and a checkbox for 'Microsoft Azure Database'. A hint text below reads 'eg COMPUTER\SQLINSTANCE'. The 'Authentication Type' dropdown is set to 'SQL Server Authentication'. The 'User Name' field contains 'lifecheck' and the 'Password' field is masked with asterisks. The 'Database Name' field contains 'lifecheck-new' and there is a 'Test Connection' button. At the bottom are '< Back', 'Next >', and 'Cancel' buttons.

Change Database Wizard

Select Database Type.
Choose the type of SQL Server database you would like to use.

Please select whether you would like to connect to an existing database or create a new one.

☒ Create a new database ☐ Connect to an existing database

Server Name: ... ☐ Microsoft Azure Database
eg COMPUTER\SQLINSTANCE

Authentication Type:

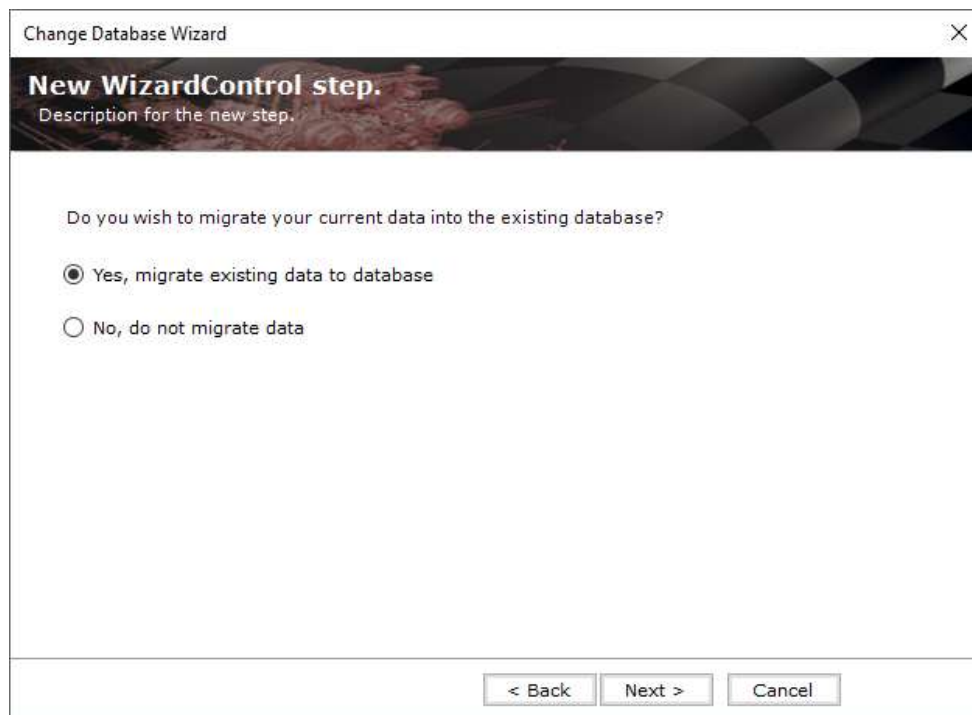
User Name:

Password:

Database Name :

< Back Next > Cancel

Now click **Test Connection**. In this case you should expect to see the second response listed above namely the connection to the server was successful, but the database could not be found. If you do not get this, please check the details entered especially if a database had been found as you don't want to over-write any existing database! If all went well, click **Next** to proceed to the next screen.



Change Database Wizard

New WizardControl step.
Description for the new step.

Do you wish to migrate your current data into the existing database?

☒ Yes, migrate existing data to database

☐ No, do not migrate data

< Back Next > Cancel

In most cases you should select to migrate your existing data to the new database however if you were wanting to start completely from scratch with a blank database, you can select to not migrate data. Click **Next** and then **Finish** to start the process. At the end, LifeCheck will restart connected to the new server and database.

Connecting other Users to the new Database

At this point the first user will now be connected to the new database however all other users will still be pointing to the old database and they must also be updated. To do this, use the **Administration > Remote Database** option from the main menu and repeat the above process to connect to an existing database for each user.

Disclaimer:

Please note that while every effort has been made to ensure the accuracy of this document, Trenchant Technology, Ltd may not be held responsible for any errors or omissions or any data loss which may occur through the use of this document. It is highly recommended that a backup of the LifeCheck database is made prior to making any changes such as importing parts.