



How to Relocate a Strata Master Database

Overview

The following instructions will help you relocate your Strata Master Database to a new server.

NOTE: We recommend that these steps are performed by your IT Technician with sufficient planning and testing

- Ensure the new server meets the system requirements <https://kb.rockend.com/help/strata-master-system-requirements>
- An installation of Strata Master will also be required on the server before proceeding - refer to our article [Strata Master Installation Instructions](#)

Please allow additional time if the following additional products are in use

- **File Smart** must be relocated by MRI Software, if you require a File Smart server relocation please refer: [How to Relocate a File Smart Server](#)
- **Strata Master Connect** relocation is performed by MRI Software's Professional Services team. This will incur a one off fee and must be scheduled according to availability, please email ps.rockendprojects@mrisoftware.com to discuss your relocation.
- **Strata Master Hybrid Cloud** relocation also needs to be performed by MRI Software's Professional Services team. As above, this must be scheduled according to availability, please email ps.rockendprojects@mrisoftware.com to discuss your relocation.
- **Strata Communicator**, (check Programs & Features for 'Rockend Web Access'), this must be uninstalled from the old server and installed on the new server
- Refer to [Strata Communicator Installation Guide](#) for the relevant instructions

Steps

1. Contact Rockend to **obtain the full install package for Strata Master**
2. On the new server, **perform a new complete installation of the Strata Master server** - instructions are located in the full install package. This will create a blank database, ensure you can log into Strata Master using the default credentials;
 - Username: administrator
 - Password: administrator
3. **Relocate the SQL database**

1. On the existing server, open Strata Master and **perform a Backup**
2. On the new server, open Strata Master and **perform a Restore**
4. **Merge the following folders** from the old strata\$ share to the new strata\$ share:
 - \CreditorCompliance
 - \BankStatements
 - \Backup
 - \Documents - all
 - \Graphic - all
 - \Template - all
 - \Data - Only merge non SQL Database files (IE: merge any .pdf or .rtf files but do not merge the .ldf or .mdf files)
5. Open Strata Master on the new server and **reconfigure the paths for the following features**. Note any additional folders that need to be relocated to the new server
 - **Graphics:** Configure > Agency > Options 1
 - **Bank Statements:** Configure > Bank Statement Filing
 - **Download Configuration:** Configure > Download
 - **Backups:** Configure > Display and Set Config Values > Backup
 - **Banking File:** Accounting > Process Direct Entry Payments
 - **Bulk BPAY File:** Accounting > Process Bulk BPAY Payments
 - **Document Directory:** Configure > Display and Set Config Values > Backup

NOTE: When configuring the Document Directory if the location is blank then no changes need to be made (the default will be \\CurrentServerName\strata\$\documents). Otherwise it has been altered outside of Strata Master and needs to be manually updated in SQL Management Studio under strata\dbo.Config\DocumentsDirectory
6. **Reconfigure the Strata Master workstations** by altering the UDL connection - default location is c:\strata\strata.udl. Ensure other relevant servers are updated such as File Smart
7. Check if **Strata Communicator** is installed (check Programs & Features for Rockend Web Access). This must be uninstalled from the old server and installed on the new server. Refer to our Strata Master Knowledgebase for the relevant instructions



We strongly recommend disabling the old SQL Server services to protect any workstations that may have been missed.