

Milestone Systems

Quick guide: Failover clustering

XProtect® Advanced VMS products



milestone
The open platform company

About Windows Server Failover Clustering (WSFC)

If your VMS environment requires continuous access that cannot tolerate hardware and software failures without any system interruption, then a viable system solution is Windows Server Failover Clustering (WSFC).

In some cases, for example a small retail shop, the operation of the VMS is not critical enough to warrant the cost of additional hardware. Instead, the shop accepts that failures can be addressed within a day or two by fixing or replacing the server. But, if your VMS environment requires high-availability, then WSFC can be a cost-effective way of achieving that.

WSFC provides an infrastructure that supports high-availability and disaster recovery of hosted server applications. A WSFC cluster is a group of independent servers that work together to increase the availability of applications and services. If a cluster node or service fails, the services that are hosted on that node can be automatically or manually transferred to another available node. This is known as failover.

This document provides an outline on creating a high availability environment with Microsoft Failover Clustering on two server nodes by:

- Preparing the operating system for failover clustering (see "Prerequisites for clustering" on page 6)
- Installing an SQL Server for failover clustering (see "Install SQL cluster failover" on page 9)
- Configuring redundant XProtect management servers (see "Configure redundant XProtect management servers" on page 11)
- Setting up service redundancies (see "Set service dependencies" on page 13) and
- Verifying that the failover clustering works (see "Verify that failover clustering is working" on page 14)

This document provides a general outline of WSFC. Refer to the Microsoft documentation (<https://msdn.microsoft.com/en-us/library/hh270278>) for more detailed information.

Note: There are many ways to set up failover clustering. This document shows a simple example of one way: a Failover Cluster Instance (FCI) with shared storage.

We recommend you refer to the Microsoft documentation (<https://msdn.microsoft.com/en-us/library/hh270278>) for more information about failover clustering.

This document is primarily intended for:

- Surveillance system architects, designers and integrators
- Large-scale surveillance project consultants
- Installers

System setup

In XProtect Corporate and XProtect Expert, you can achieve high availability for the management server and SQL Server by using Windows Server Failover Clustering (WSFC).

Hardware failures on a standalone server running the management server and SQL Server do not affect recordings or the recording server. However, hardware failures can result in downtime for operators that are not already logged into the clients. A WSFC environment will mitigate this downtime. There are a number of reasons why you would want to use a cluster:

- **Server failure** – If a server starts to have problems, you can run the management server and SQL Server from another node while you resolve the issue.
- **System updates and security patches** – Applying security patches on a standalone server can be time consuming, resulting in extended periods of downtime. By using failover clustering, you can apply system updates and security patches with minimal downtime.
- **Seamless connection** – Because clients and applications connect to a failover cluster by using the cluster IP address and cluster name, the connection to the management server and SQL Server is transparent and failover is seamless.

Minimum server requirements

The servers in a clustered environment must be identical in terms of hardware, operating system and software.

This document is based on an environment comprising the following components. Each component have their own set of minimum requirements.

Component	Requirement
Operating system	<p>This document is based on clustering in a Microsoft® Windows Server 2016 environment.</p> <p>Clustering is only available in the Standard and Datacenter editions of Windows Server.</p> <p>Earlier versions of Windows Server (from 2003) also support Windows Server Failover Clustering (WSFC).</p>
Storage	<p>External storage for database files and video archives is required. Serial attached SCSI, Fiber Channel or iSCSI are recommended.</p>
SQL Server	<p>While Microsoft® SQL Express is bundled with XProtect Corporate and XProtect Expert, it is not supported for clustering.</p> <p>This document is based on Microsoft® SQL Server 2016 Enterprise Edition x64.</p>
XProtect Corporate or XProtect Expert	<p>This document is based on XProtect Corporate or XProtect Expert 2017 R1.</p>

Planning checklist

Before you create a failover cluster environment, you should have the following information for your environment.

The following tables provide examples of the information you require.

Servers

Host name	Windows Version / Edition	Physical /Virtual	CPU	RAM	Domain	Role
Cluster1	Windows Server 2016 Datacenter Edition x64	Virtual	2 CPU 2.54 GHz	8 GB	TESTDOMAIN.local	Cluster node 1
Cluster2	Windows Server 2016 Datacenter Edition x64	Virtual	2 CPU 2.54 GHz	8 GB	TESTDOMAIN.local	Cluster node 2
Shared Storage	N/A	N/A	N/A	N/A	N/A	Shared storage for SQL Server data

Network

Host name	Network	IP	Subnet	Gateway	Primary DNS	Secondary DNS
Cluster 1	Public	177.16.0.213	255.255.0.0	177.16.0.1	177.16.0.200	193.168.0.200
	Heartbeat	199.160.0.213	255.255.255.0			
	iSCSI	10.0.0.213	255.0.0.0			
Cluster 2	Public	177.16.0.214	255.255.0.0	177.16.0.1	177.16.0.200	193.168.0.200
	Heartbeat	199.160.0.214	255.255.255.0			
	iSCSI	10.0.0.213	255.0.0.0			
Shared Storage	Public	177.16.0.211	255.255.0.0			
SQL 2016 Cluster	Public	177.16.0.217	255.255.0.0			

XProtect Quick guide: Failover clustering - Advanced VMS products

Shared storage

Storage name	Purpose	Volume	Path	Size
Quorum	Cluster Witness Disk	Quorum	B:\	1GB
Data	SQL Server Disk	SQL	F:\	20GB

Cluster services

Application	Software	Virtual Server Name	Virtual IP Address
SQL Server	SQL Server 2016 Enterprise Edition x64	SQL2016Cluster	177.16.0.217

Service accounts

Domain account	Password	Purpose
TESTDOMAIN\sqlservice	*****	SQL Server service account
TESTDOMAIN\sqlagent	*****	SQL Server Agent service account

SQL Server Always On Failover Cluster Instances (FCI)

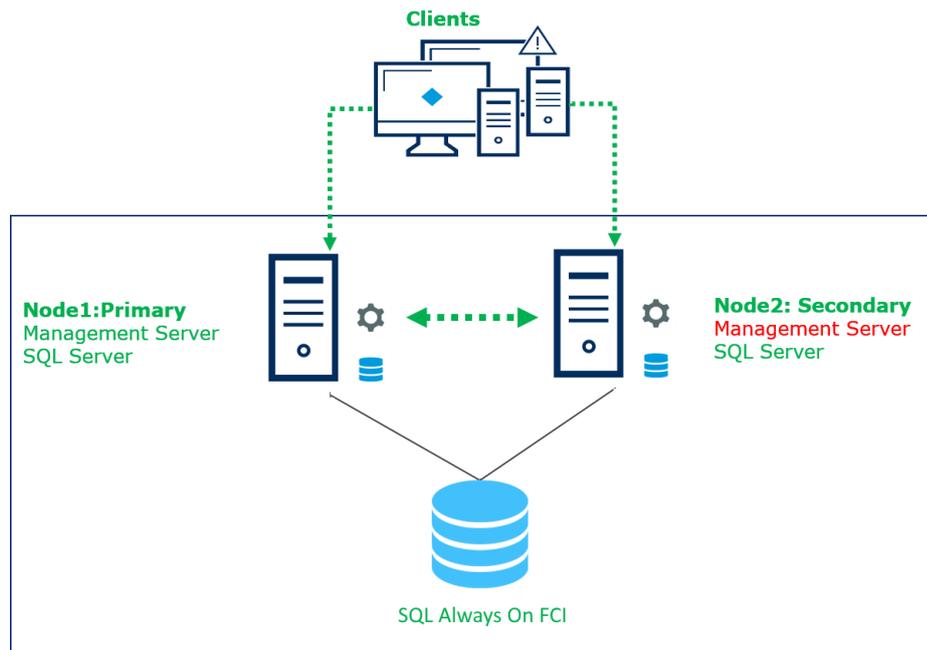
A Failover Cluster Instance (FCI) is a single instance of SQL Server that is installed across Windows Server Failover Clustering (WSFC) nodes. On the network, an FCI appears to be an instance of SQL Server running on a single computer, but the FCI provides failover from one WSFC node to another, if the current node becomes unavailable.

Windows Failover Cluster relies on shared storage. FCI supports storage solutions such as WSFC cluster disks (iSCSI, Fiber Channel, and so on) and server message block (SMB) file shares. When a SQL Server instance is installed on the cluster, Milestone and system databases are required to be on the shared storage. Note that this means that your storage is a single point of failure, so the databases should be backed up elsewhere.

Shared storage allows the cluster to move the SQL instance to any node in the cluster. This can be done either manually, or automatically if one of the nodes is having a problem. There is only one copy of the data, but the network name and SQL Server service for the instance can be made active from any cluster node.

A failover cluster gives you the ability to have all the data for a SQL Server instance installed in a shared storage that can be accessed from different servers. It will always have the same instance name, IP address and port and logins, therefore XProtect Corporate and XProtect Expert will always know where to access the data.

This document provides a general outline of FCI. Refer to the Microsoft documentation (<https://msdn.microsoft.com/en-us/library/ms189134>) for more detailed information.



Prerequisites for clustering

Windows Failover Cluster relies on shared storage. Make sure you have shared storage with at least two disks: a designated disk for quorum and another designated disk for SQL Server data.

Failover clustering also requires that you use an Active Directory domain.

Before setting up your failover cluster environment, make sure you have the component information as described in Planning checklist (on page 3).

Refer to the Microsoft documentation (<https://msdn.microsoft.com/en-us/library/ms189910.aspx>) for more detailed information on installation requirements for failover clustering.

Enable failover clustering on each node

On each node, do the following:

1. Log in to the Windows Server as Administrator.
2. Open the **Server Manager**.
3. Click **Add roles and features**.

The **Add Roles and Features Wizard** appears.

1. In the **Before You Begin** window, click **Next**.
2. In the **Installation Type** window, select **Role-based or feature-based installation** and click **Next**.
3. In the **Server Selection** window, select **Select a server from the server pool** and select the current server and then click **Next**.
4. In the **Server Roles** window, click **Next**.
5. In the **Features** window, select **Failover Clustering**.

The **Add features that are required for Failover Clustering** window appears.

Select **Include management tools (if applicable)** and click **Add Features**.

Click **Next**.

6. In the **Confirmation** window, click **Install**.
7. When the installation is complete, click **Close**.

After you have prepared the operating system on all of the nodes, create the cluster (on page 7) on Node 1.

Create the cluster

On Node 1, run a validation test to ensure the server configuration can support clustering.

1. In the **Server Manager**, select **Tools > Failover Cluster Manager**.

The **Failover Cluster Manager** appears.

2. In the **Actions** pane, click **Validate Configuration**.

XProtect Quick guide: Failover clustering - Advanced VMS products

The **Validate a Configuration Wizard** appears.

3. In the **Before You Begin** window, click **Next**.
4. In the **Select Servers or a Cluster** window, click **Browse** and add the names of the nodes in the cluster. Click **Next**.
5. In the **Testing Options** window, select **Run all tests (recommended)** and click **Next**.
6. In the **Confirmation** window, click **Next**.

The wizard validates the configuration. When it is done, the **Summary** window appears.

7. In the **Summary** window, verify that both nodes are validated. Select **Create the cluster now using the validated nodes** and click **Finish**.

The **Create Cluster Wizard** appears.

8. In the **Create Cluster Wizard**, do the following:
 1. In the **Before You Begin** window, click **Next**.
 2. In the **Access Point for Administering the Cluster** window, enter the cluster name and click **Next**.
 3. In the **Confirmation** window, ensure that **Add all eligible storage to the cluster** is selected, and click **Next**.

A new cluster is created.

4. In the **Summary** window, verify that the cluster is created and then click **Finish**.

Install SQL cluster failover

To create a new SQL Server installation for the failover cluster, sign in to Node 1 using the domain Administrator credentials, and start the SQL Server Installer executable. This starts the **SQL Server Installation Center**.

The following steps provide an outline of this installation. Refer to the Microsoft documentation (<https://msdn.microsoft.com/en-us/library/ms179530.aspx>) for more detailed information.

1. On the **Installation** page, click **New SQL Server failover cluster installation**.

The **Install a SQL Server Failover Cluster** window appears.

2. On the **Product Key** page, indicate whether you are installing a free edition of SQL Server, or whether you have a PID key for a production version of the product. Click **Next**.
3. On the **License Terms** page, read the license agreement, and then select the check box to accept the license terms and conditions. Click **Next**.
4. The **Global Rules** checker runs a discovery operation on your computer.

The **Global Rules** checker verifies the system state of your computer before setup continues.

If the checker identifies any missing product updates, on the **Product Updates** page, select the **Include SQL Server product updates** check box and click **Next** to continue.

5. The setup checker identifies potential problems that might occur while running setup. You must correct failures before setup. Click **Next** to continue.
6. On the **Feature Selection** page, select **Database Engine Services**.

Sub-features are automatically selected.

Click **Next**.

The setup runs another set of rules that are based on the features you selected to validate your configuration.

7. On the **Instance Configuration** page, do the following:
 1. Specify a network name for the new SQL Server failover cluster. This is the name that is used to identify your failover cluster on the network.
 2. Specify a named instance, name it for example SQLCLUSTER.
 3. Click **Next**.
8. On the **Cluster Resource Group** page, you can specify the cluster resource group name where SQL Server virtual server resources will be located. Leave as default and click **Next**.
9. On the **Cluster Disk Selection** page, select the shared cluster disk resource for your SQL Server failover cluster.

The cluster disk is where the SQL Server data will be put. You can select more than one disk.

Click **Next**.

10. On the **Cluster Network Configuration** page, specify the network resources for your failover cluster instance.

XProtect Quick guide: Failover clustering - Advanced VMS products

Specify a static IP type and IP address for your failover cluster. This is recorded under Network in Planning checklist (on page 3).

Click **Next** to continue.

11. On the **Server Configuration** page under the **Service Accounts** tab, specify login accounts for SQL Server services. These are recorded under Service Accounts in Planning checklist (on page 3). Click **Next** to continue.
12. On the **Database Engine Configuration** page, define the following:
 1. Under the **Server Configuration** tab, define the SQL server administrator account and the server authentication mode.
 2. Under the **Data Directories** tab, define the paths for the following. The path to where SQL data will be stored is recorded under Shared Storage in Planning checklist (on page 3).
 - Data Root Directory
 - User Database Directory
 - User Database Log Directory

Backup Directory Distribution can be, for example:

Disk	Volume	Usage	Path
1		Cluster Quorum Drive	N/A
2	1	Data Root Directory User Database Directory Backup Directory	F:\ F:\MSSQL13.SQLCLUSTER\MSSQL\Data F:\MSSQL13.SQLCLUSTER\MSSQL\Backup
3	2	User Database Log Directory TempDB data directory TempDB log directory	E:\MSSQL13.SQLCLUSTER\MSSQL\Data

Click **Next**.

The System Configuration Checker runs another set of rules that are based on the settings you selected to validate your configuration.

13. On the **Ready to Install** page, click **Install**.
14. After installation, the **Complete** page provides a link to the summary log file for the installation. Click **Close** to complete the SQL Server installation.

Configure redundant XProtect management servers

Now that you have created a failover cluster using both Node 1 and Node 2 servers as cluster nodes, you must install the XProtect Management Server on both Node 1 and Node 2 and configure both XProtect Management Servers so that their services run in the cluster instead of on each individual server.

Note: As a prerequisite, each Management Server in the cluster must be installed under the domain Administrator service account.

You must do the following:

- Install and configure XProtect management server on Node 1 (on page 11)
- Install and configure XProtect management server on Node 2 (on page 12)

Install and configure XProtect management server on Node 1

1. On Node 1, run the Milestone XProtect Advanced VMS Products 2017 R1 System Installer.exe file.

The installation files unpack. Depending on your security settings, one or more Windows® security warnings appear. Accept these and the unpacking continues.

2. After specifying the location of the license file and accepting the license terms, select **Custom**.

A list of components to be installed appears. Apart from the management server, all elements in the list are optional.

3. Select all components EXCEPT the Recording Server and Smart Client. Click **Continue**.
4. In the **Select Microsoft SQL Server** window, select **Use an existing SQL Server on the network** and select the location of the Central SQL Server that you installed in Install new SQL Server failover cluster installation (see "Install SQL cluster failover" on page 9). Click **Continue**.
5. Select **Create new database** and click **Continue**.
6. In the **Select Service Account** window, select **This account** and enter the domain Administrator credentials. Click **Continue** and then click **Install**.
7. After the installation is complete, open the XProtect Management Client using the domain Administrator credentials.
8. From the **Tools** menu, select **Registered Services**.
9. In the **Add/Remove Registered Services** window, select each service in the list and click **Edit**.

In the **Edit Registered Service** window, modify the URL address to use the Cluster Name.

Update all of the services listed in the **Add/Remove Registered Services** window including the Service Channel http and https fields. The new URLs should look something like this:

XProtect Quick guide: Failover clustering - Advanced VMS products

- Event Server: http://ClusterName.host:22331/
 - Log Server: http://ClusterName.host:80/LogServer/soapext.dll?logserver
 - Report Server: http://ClusterName.host/Reporting/
 - Service Channel: http://ClusterName.host:80/ and https://ClusterName.host:443/
10. In the **Add/Remove Registered Services** window, click **Network** and in the **Service address (LAN)** field, modify the URL address to use the cluster service address and then click **OK**.
 11. In the **Add/Remove Registered Services** window, click **Close** and exit the XProtect Management Client.
 12. On Node 1, stop the management server service and the IIS service.

To stop IIS, launch the **Internet Information Services (IIS) Manager** and navigate to the **Web server** node in the tree.

In the **Actions** pane, click **Stop**.

Install and configure XProtect management server on Node 2

1. On Node 2, run the Milestone XProtect Advanced VMS Products 2017 R1 System Installer.exe file.

The installation files unpack. Depending on your security settings, one or more Windows® security warnings appear. Accept these and the unpacking continues.
2. After specifying the location of the license file and accepting the license terms, select **Custom**.

A list of components to be installed appears. Apart from the management server, all elements in the list are optional.
3. Select all components EXCEPT the Recording Server, Management Client and Smart Client. Click **Continue**.
4. In the **Select Microsoft SQL Server** window, select **Use an existing SQL Server on the network** and select the location of the Central SQL Server that you installed in Install new SQL Server failover cluster installation (see "Install SQL cluster failover" on page 9). Click **Continue**.
5. Select **Create new database** and click **Continue**.
6. In the **Select Service Account** window, select **This account** and enter the domain Administrator credentials. Click **Continue** and then click **Install**.
7. After the installation is complete, open the XProtect Management Client using the domain Administrator credentials.
8. From the **Tools** menu, select **Registered Services**.
9. In the **Add/Remove Registered Services** window, select each service in the list and click **Edit**.

In the **Edit Registered Service** window, modify the URL address to use the Cluster Name.

XProtect Quick guide: Failover clustering - Advanced VMS products

Update all of the services listed in the **Add/Remove Registered Services** window including the Service Channel http and https fields. The new URLs should look something like this:

- Event Server: http://ClusterName.host:22331/
 - Log Server: http://ClusterName.host:80/LogServer/soapext.dll?logserver
 - Report Server: http://ClusterName.host/Reporting/
 - Service Channel: http://ClusterName.host:80/ and https://ClusterName.host:443/
10. In the **Add/Remove Registered Services** window, click **Network** and in the **Service address (LAN)** field, modify the URL address to use the cluster service address and then click **OK**.
 11. In the **Add/Remove Registered Services** window, click **Close** and exit the XProtect Management Client.

Postrequisite

When this is done, modify all of the recording servers and failover servers to connect to the cluster service address for the management server by doing the following:

1. On the server where the Recording Server is installed, right-click the **Recording Server** icon in the tool bar and select **Stop Recording Server Service** from the menu.
2. After the Recording Server is stopped, again right-click the **Recording Server** icon in the tool bar and select **Change Settings**.

The **Recording Server Settings** window appears.
3. Modify the address for the management server to connect to the cluster service, and click **OK**.
4. Right-click the **Recording Server** icon and select **Start Recording Server service** to start the Recording Server service again.

Set service dependencies

On Node 2, open the Server Manager, select **Tools > Failover Cluster Manager**.

1. In the **Failover Cluster Management** window, expand your cluster, right-click **Roles** and select **Configure Role**.
2. In the **High Availability Wizard**, click **Next**.
3. In the **Select Role** window, select **Generic Service** and click **Next**.
4. Select **Milestone XProtect Management Server** and click **Next**.
5. On the **Client Access Point** window, specify the server name for the management server generic service, and click **Next**.
6. On the **Select Storage** window, no storage is required for the service, click **Next**.
7. On the **Replicate Registry Settings** window, no registry settings should be replicated so click **Next**.

XProtect Quick guide: Failover clustering - Advanced VMS products

8. On the **Confirmation** window, verify that the cluster service is configured according to your needs and click **Next**.

The management server is now configured as a generic service in the failover cluster. Click **Finish**.

Set dependencies

In the cluster setup, both the Milestone Event Server and the Milestone Data Collector should be set as dependent services of the Milestone Management Server, so the Event Server and Data Collector stop when the Management Server is stopped.

Add the Milestone XProtect Event Server service as a resource to the Milestone XProtect Management Server Cluster service by doing the following:

1. Right-click the **XProtect Server** role and select **Add Resource > Generic Service**.
2. Select **Milestone XProtect Event Server** and then click **Next**.
3. Click **Next** to confirm and click **Finish**.

Verify that failover clustering is working

On both Node 1 and Node 2, open the Server Manager.

- If Node 2 is currently running the XProtect Server:
 1. On Node 2, select **Tools > Failover Cluster Manager**.
 2. In the tree, expand the cluster node and select **Nodes**.
 3. In the **Nodes** pane, select the server for Node 2.
 4. At the bottom of the window, open the **Roles** tab.
 5. Note that the Node 2 server is running the XProtect Server.
 6. Restart the Node 2 server.
 7. Note that the Management Server on Node 1 comes online.
- If Node 1 is currently running the XProtect Server:
 1. On Node 1, select **Tools > Failover Cluster Manager**.
 2. In the tree, expand the cluster node and select **Nodes**.
 3. In the **Nodes** pane, select the server for Node 1.
 4. At the bottom of the window, open the **Roles** tab.
 5. Note that the Node 1 server is running the XProtect Server.
 6. Restart the Node 1 server.
 7. Note that the Management Server on Node 2 comes online.

About Milestone Systems

Milestone Systems is a global industry leader in open platform IP video management software, founded in 1998 and now operating as a stand-alone company in the Canon Group. Milestone technology is easy to manage, reliable and proven in thousands of customer installations, providing flexible choices in network hardware and integrations with other systems. Sold through partners in more than 100 countries, Milestone solutions help organizations to manage risks, protect people and assets, optimize processes and reduce costs. For more information, visit: <http://www.milestonesys.com>.