

Server – Database Installer for QuicDoc[®] and Office Therapy[®]

Installation Guide



What you need to know before you start

This Guide was written to assist you in installing and setting up the **Database** system for QuicDoc and/or Office Therapy ("the **Applications**"). The Applications use a "back-end" database – Microsoft SQL Server - to store your patient records. If you are running QuicDoc and/or Office Therapy on just one computer, then the Database and Applications will be installed on the same computer. However, if you are installing the Applications on more than one computer, you will typically install the Database on a dedicated Server or a separate Server machine.

System Requirements: Before you start with the Database Installation you will need to make sure your server or, if installing on one computer, has the following software packages installed:

.NET Framework 2.0 .Net Framework 4.0

To check the versions of .NET on you system, open Windows Explorer and navigate to: C:\Windows\Microsoft.Net\Framework

Computer > OS (C:) > Windows > Microsoft.NET	Framework		- - i i j
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More »)) v3.5	6/5/2009 8:42 AM	File Folder
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You can see on the right side that Versions 2.0 and 4.0 are installed. If not, you can download .NET 4 from the following site: <u>http://www.microsoft.com/en-us/download/details.aspx?id=17851</u> Select the Download button and follow the instructions to download and run the install. .NET 4 is supported on XP SP3, Vista, and Windows 7. It may require that you are running Windows Internet Explorer 8 or higher. To check, open Internet Explorer and go to Help...About Windows Explorer to check the Version.

The Database Installer (DatabaseInstaller10.exe) which you have downloaded will install Microsoft SQL Server 2005 Express, related components, and attach QuicDoc and Office Therapy Databases to the SQL Server Database system. The following applies to new installs or updates of QuicDoc versions 9.0 or later and Office Therapy 10.0 or later only. A current annual maintenance plan is required for updates.

You will need a password for the Database Installer, which you should have received from DTI Sales or Support, to run the setup file. Contact DocuTrac at 800-850-8510 if you did not receive the password.

Have questions or having difficulty installing? Don't worry. Call DocuTrac Support at 888-308-9683 and we will walk you through it each step of the way.

Running the Database Installer

If running the **Applications** on a single PC, or if installing to a Server, begin the setup by right-clicking on **DatabaseInstaller10.exe** and selecting **Run as Administrator**.

***If you are prompted whether to Allow, click Allow or Trust Publisher to continue.

Enter the **password** provided by DTI Sales or Support, and click **OK**.

After InstallAware has verified the package and extracted setup files, you will see the initial setup screen.

🐞 QuicDoc and Office Therap	y Databases - InstallAware Wizard 📃 🔲 🔀
	Welcome to the InstallAware Wizard for QuicDoc and Office Therapy Databases
	The InstallAware Wizard will install QuicDoc and Office Therapy Databases on your computer.
	WARNING: This program is protected by copyright law and international treaties.
	To continue, dick Next. Next > Cancel

Click **Next** to continue.

🐞 QuicDoc and	d Office Therapy Databases - InstallAware Wizard	
Installing (The progra	QuicDoc and Office Therapy Databases Requirements am requirements are being configured.	5
12	Please wait while the InstallAware Wizard installs QuicDoc and Office Therapy Databases requirements. This may take several minutes.	
	Status: Installing SQL Server 2005 SP4	
InstallAware		
	Next >	ancel

Setup will now install, setup and configure SQL Server. Depending on the speed of your system, this process may take up to 15-20 minutes. Setup is installing and configuring SQL Server 2005 Express (SP4) along with a number of critical required components. PLEASE BE PATIENT. The status bar may remain on the spot above for quite a while.

When the setup and configuration is complete, you will see the following screen:

👔 QuicDoc and Office Therap	oy Databases - InstallAware Wizard 📃 🔲 🔀
3	Completing the InstallAware Wizard for QuicDoc and Office Therapy Databases
	The InstallAware Wizard is now ready to configure QuicDoc and Office Therapy Databases on this computer.
	- Click Next to begin configuration
	- Click Back to change settings
	- Click Cancel to exit
	< <u>B</u> ack <u>N</u> ext > Cancel

Click **Next** to continue. Setup will now create the databases and attach them to the SQL Server.

🚯 QuicDoc and Office Therap	y Databases - InstallAware Wizard 📃 🔲 🔀
3	Completing the InstallAware Wizard for QuicDoc and Office Therapy Databases
	You have successfully completed the InstallAware Wizard for QuicDoc and Office Therapy Databases.
	To close this wizard, click Finish.
	(Finish Cancel

When the databases have been attached you can then click **Finish**.

If you are setting up a fresh installation of the Applications or you are updating from QuicDoc 9.xx and/or Office Therapy 10.xx, you can skip the following sections.



If you are setting up a fresh installation of the Applications or you are updating from QuicDoc 9.xx, you can skip this section.

If you are updating from an earlier version of QuicDoc that used MS Access for the database (QuicDoc V7.59), you will need to migrate or convert the databases to SQL Server.

Make sure that your QuicDoc databases are on the Server. You may need to move them to a folder on the server, or if you were using this server for the earlier version databases, they will already be present. Look in the following locations depending on your Windows version:

XP:C:\Documents and Settings\All Users\Documents\DocuTrac \QuicDoc Std\DataVista or Newer:C:\Users\Public\Documents\DocuTrac\QuicDoc Std\Data

The databases in this location will include the main database, **QDData.mdb**.

<<IMPORTANT: Make sure you have a backup of your databases before you perform the migration.>>

Once you have determined that your old QuicDoc databases to migrate are on the Server, you can run the Database Migration Wizard.

Select All Programs	OuicDoc and Office	Therapy OuicDoo	Migration Wizar	d from the Start button
Select All Flograms.	QuicDoc and Onice	The apyQuicDo	L IVIIgi ationi vvizai	u nom the start button.

🛃 Database Migration Expert	- ¤ x
	Migrate Access Database
	Welcome to the DTI Database Migration Wizard. This wizard will help you migrate your Microsoft Access database to a Microsoft SQL Server database.
	To continue, dick Next
	< Back Next > Cancel

Click Next

•	Database	Migration Expe	rt	- = ×
	Database Plea	and Server Se se select an Acce	section ss database source and a SQL Server destination.	
	Please sele button. Th	ect the Access da nen, navigate to	tabase that you would like to migrate. To perform this task your Access database and click the "Open" button.	k, click on the ellipsis
	Access Da	tabase Location:	C: \Data \DTI \QuicDoc Std \Data \qddata.mdb	1
		Password:		2
	Please cho selected se	ose a server from erver.	the "SQL Server" drop-down list. The Access database w	ill be migrated to the
		SQL Server:	W2K8SRVR\PTISQLSERVER	- Refresh 3
		_	Marine Contractory	
			W2K8SRVR\DTISQLSERVER	4
			And the second	
			< Back	lext > Cancel

- 1. First click the ellipsis button [...] to navigate to your QuicDoc databases and select QDData.MDB
- 2. If you have set a password for your QuicDoc Database, enter it; otherwise, leave blank
- 3. Click the **Refresh** button for the Wizard to search for and list SQL Servers on your PC or Network
- 4. Select the **DTISQLSERVER** instance
- 5. Click Next to continue



The Wizard will connect the SQL Server instance you selected. Click Next to continue.

•	Databa	se Migrat	ion Expert	- =	Х
	Databa	se Migral	lion		
	We have Access of of your of	successfi atabase t latabase.	ully connected to your Microsoft SQL Server. Our next step is to migrate your Microso o a Microsoft SQL Server database. The length of this process primarily depends on t Once you click the "Next" button, this process will begin.	ft ne size	
		DTI Da	tabase Manager		
		<u>^</u>	Migrating your Access database to SQL Server will overwrite all of the data in the existing SQL Server QuicDoc Database. If you have been using the SQL Server Database and you continue the migration process, all of the data that has been entered into the SQL Server database will be lost. Do you want to continue?		
			· v		
			< <u>B</u> ack <u>N</u> ext > C	ancel	

Caution: If you have already migrated your Access database, DO NOT repeat the process. The Wizard will overwrite the SQL Server QuicDoc database and you may lose data entered after migrating the first time. If this is the first time migrating the older QuicDoc database, click **Yes** to continue.

🖳 Database Migration Expert	×
Database Migration	
We have successfully connected to your Micr Access database to a Microsoft SQL Server o of your database. Once you dick the "Next"	rosoft SQL Server. Our next step is to migrate your Microsoft Jatabase. The length of this process primarily depends on the size 'button, this process will begin.
	k
	< Back Next > Cancel
	Migrating Database

The process may take several minutes during which time you will see the screen above. Please be patient. AND REMEMBER.....

Having difficulty or you received an error? Don't worry.

Call DocuTrac Support at 888-308-9683 and we will walk you through it.



When successful, you will see the following screen. Click Finish.

Migrating from Office Therapy 8.xx (Access)

If you are setting up a fresh installation of the Applications or you are updating from Office Therapy 10, you can skip this section.

If you are updating from an earlier version of QuicDoc that used MS Access for the database (Office Therapy V8.04), you will need to migrate or convert the databases to SQL Server.

Make sure that your Office Therapy database is on the Server. You may need to move it to a folder on the server, or if you were using this server for the earlier version database, it will already be present. Look in the following locations depending on your Windows version:

XP: C:\Documents and Settings\All Users\Documents\DocuTrac \Office Therapy\DataVista or Newer: C:\Users\Public\Documents\DocuTrac\ Office Therapy \Data

Please make a note of the name of your Office Therapy database you used when creating it. It will end with the extension <u>.MBC</u>

Follow the same steps as above for the QuicDoc Migration Wizard.

Select All Programs...QuicDoc and Office Therapy...QuicDoc Migration Wizard from the Start button.

🛃 Database	Migration Expe	rt		×
Database Plea	and Server Se se select an Acces	lection is database source and a SQL Server destination.		
Please sele button. Th	ect the Access dat nen, navigate to y	abase that you would like to migrate. To perform this task, dick on th our Access database and click the "Open" button.	e elipsis	
Access Dat	tabase Location:	C:\pata\pTT\pata\formata\formata	1	7
Please cho selected se	ose a server from erver.	the "SQL Server" drop-down list. The Access database will be migrate	ed to the	٦
	-	WARAANINISKUFELEC		-
		W2K8SRVR/ptisqlserver	3]
		Watupeter pour total conditio		
		< Back Next >	Cancel	

- 1. First click the ellipsis button [...] to navigate to your Office Therapy database and select it
- 2. Click the **Refresh** button for the Wizard to search for and list SQL Servers on your PC or Network
- 3. Select the **DTISQLSERVER** instance
- 4. Click **Next** to continue

After connecting to your SQL Server, click **Next.** You will see the following screen informing you that the Wizard will first update the Office Therapy database to make sure it is the latest Access version.

Click **Yes** to update it.

Database M	igration Expert — 🗖
Database N	igration
We have suc Access datab of your datab	cessfully connected to your Microsoft SQL Server. Our next step is to migrate your Microsoft ase to a Microsoft SQL Server database. The length of this process primarily depends on the size vase. Once you click the "Next" button, this process will begin.
	Office Therapy Update
	C: (Data (D) I (Data (ParkPlace.mbc is out of date. This database will be automatically updated, but you should have a backup made before proceeding!
	Do you want to proceed now?
	< Back Next > Cancel

The Wizard will now migrate the database.

🖳 Database Migration Expert 💦 🗕	-	x
Database Migration		
We have successfully connected to your Microsoft SQL Server. Our next step is to migrate your Microsoft Access database to a Microsoft SQL Server database. The length of this process primarily depends on the si of your database. Once you dick the "Next" button, this process will begin.	ze	
k		
< Back Next > Cance Migrating Database	el	

When done you will see the following screen.

🖶 Database Migration Expert	- 🗆 X
	Migration Successful
	Your Microsoft Access database was successfully migrated to Microsoft SQL Server.
	To close this wizard, click Finish
	< Back Finish Cancel

Again, remember

Having difficulty or you received an error? Don't worry.

Call DocuTrac Support at 888-308-9683 and we will walk you through it.

Running on a Network?

If you are running QuicDoc and Office Therapy over a Network where the SQL Server database is on a separate server, accessed by workstations running the application(s), you may need to make changes to SQL Server to allow connection across the network.

To check the settings and modify them if necessary, select the SQL Server Configuration Manager from your Start button. Click **Start**....**Microsoft SQL Server 2005**.... SQL Server Configuration Manager



On the left side, expand **SQL Server 2005 Network Configuration** and select **Protocols** for DTISQLSERVER. Make sure that **TCP/IP** is Enabled. If it is not, double-click to go to the **Properties** to change it.



Select **Enabled** and use the drop-down to select **Yes**.

TCP/IP Properties	? ×
Protocol IP Addresses	
General	
Enabled	No 💌
Keep Alive	30000
Listen All	Yes
No Delay	No
Enable or disable TCP/IP p	rotocol for this server instance
ОК	Cancel <u>Apply</u> Help

Select the **IP Addresses** tab, scroll to the bottom until you see **IP All** and set the **Port**. In most cases you can set this to **1433**

			*
Activ	e	Yes	
Enat	led	No	
IP Ac	Idress	fe80::5efe:192.168.1.102%17	
TCP	Dynamic Ports	0	
TCP	Port		
🗆 IP9			
Activ	e	Yes	
Enat	led	No	
IP Ac	Idress	fe80::5efe:169.254.72.37%16	
TCP	Dynamic Ports	0	
TCP	Port		
			=
TCP	Dynamic Ports	0	-
TCP	Port	1433	
			Ŧ
TCP Po	rt		
TCP por	t		
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Next, on the left side, go to **Client Protocols**, under **SQL Native Client Configuration**. Make sure that Shared Memory and TCP/IP are **enabled** and the order is as below.

SQL Server Configuration Manager	Automatical Automatical	-	
<u>File Action View H</u> elp			
🗢 🔿 🖄 🗒 🤉 🖉			
SQL Server Configuration Manager (Local)	Name	Order	Enabled
SQL Server 2005 Services	🗿 Shared Memory	1	Enabled
SQL Server 2005 Network Configuration	TCP/IP	2	Enabled
SOL Native Client Configuration	🗿 Named Pipes	3	Enabled
 ♣ Client Protocols ♣ Aliases 	¥ VIA		Disabled
		m	4

If you made any changes, you will need to **Restart the SQL Server service and Browser**. You can do so by selecting **SQL Server 2005 Services** on the left. Right-click **SQL Server (DTISERVER)** on the right, and click **Restart**. Do the same for the SQL Server Browser.

SQL Server Configuration Manager			
File Action View Help			
🗢 🔿 🙎 🗐 😖 📓 🕑 🔍 🗨 📀			2
SQL Server Configuration Manager (Local)	Name	State	
SQL Server 2005 Services	SQL Server (DTISQLSERVER)	Dunning	₫
■ SQL Server 2005 Network Configuration ■ Protocols for DTISOL SERVER	🔞 SQL Server Analysis Services (MSSQLSERVER)	Start	
▲ SOL Native Client Configuration	🔊 SQL Server Browser	Stop	
Sclient Protocols		Paus	e
📮 Aliases		Resu	me
		Resta	art
		Prop	perties
		Help	

When done, you can close the SQL Server Configuration Manager.