

DocuTrac, Inc.

Server – Database Installer for QuicDoc® and Office Therapy®

Installation Guide



What you need to know before you start

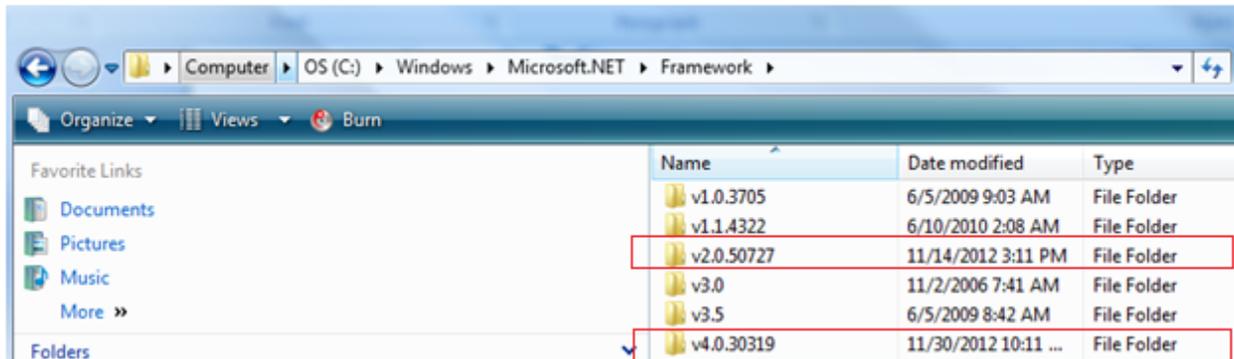
This Guide was written to assist you in installing and setting up the **Database** system for QuicDoc and/or Office Therapy (“the **Applications**”). The Applications use a “back-end” database – Microsoft SQL Server - to store your patient records. If you are running QuicDoc and/or Office Therapy on 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



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: <http://www.microsoft.com/en-us/download/details.aspx?id=17851> 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.

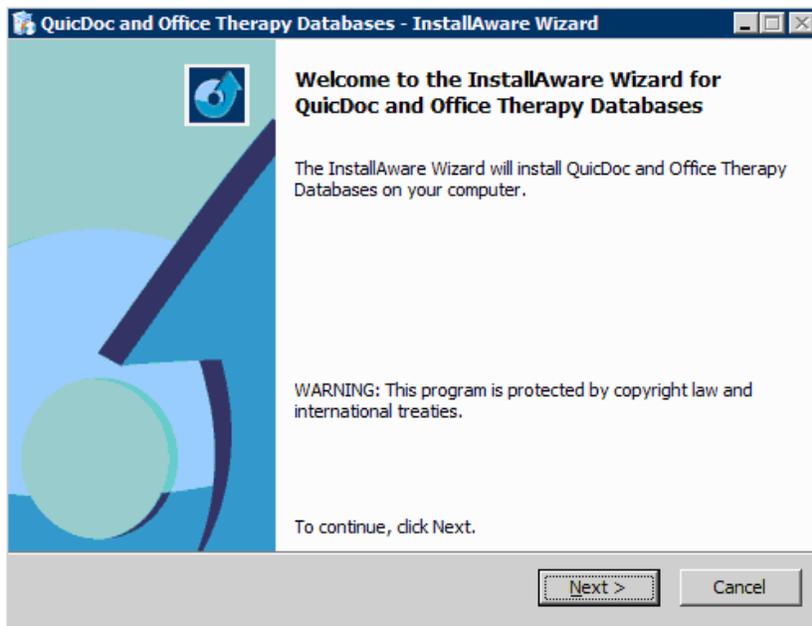
Running the Database Installer

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**.

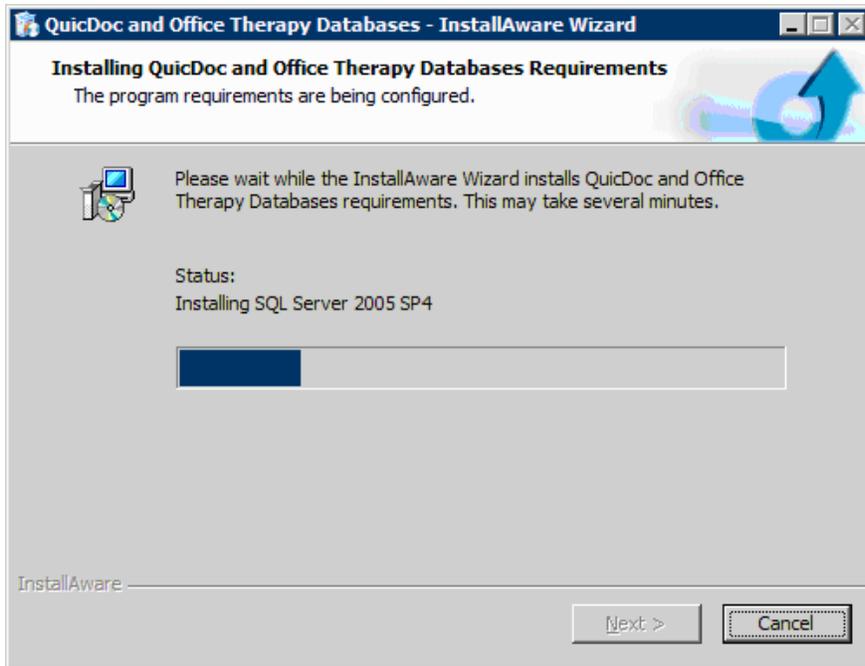
***If you are prompted whether to Allow, click Allow or Trust Publisher to continue.

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.

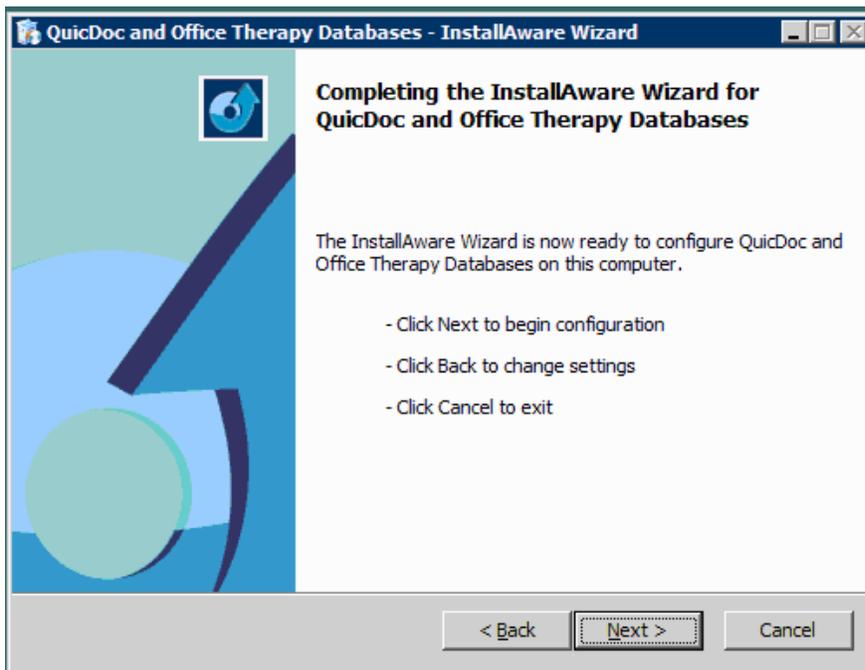


Click **Next** to continue.

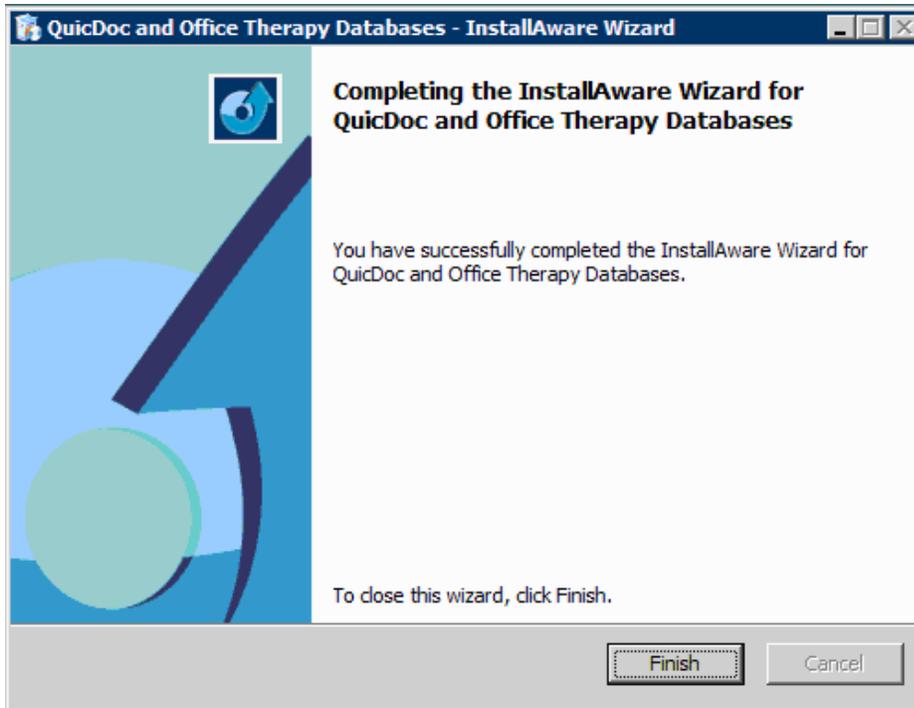


Setup will now install, setup and configure SQL Server. **Depending on the speed of your system, this process may take up to 15-20 minutes. Setup is installing and configuring SQL Server 2005 Express (SP4) along with a number of critical required components. PLEASE BE PATIENT. The status bar may remain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

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



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



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.

Migrating from QuicDoc 7.59 (Access Databases)

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\Data

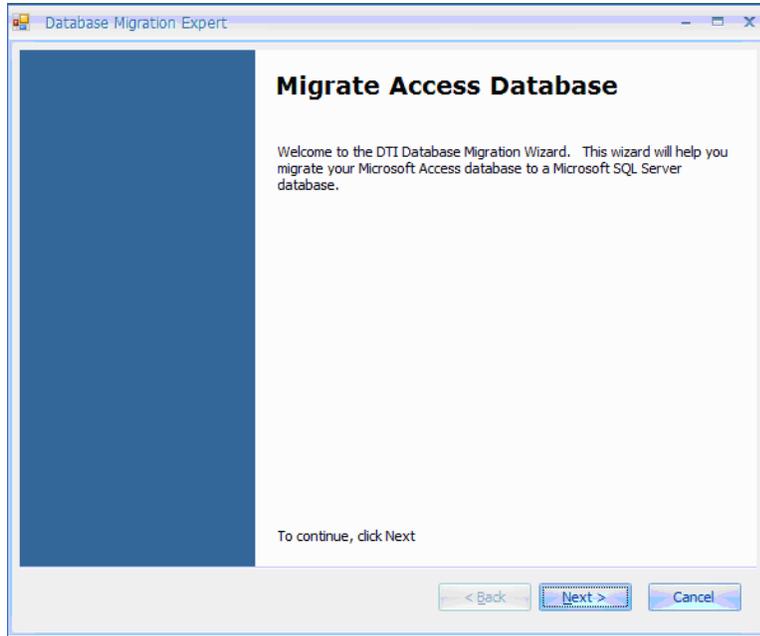
Vista or Newer: C:\Users\Public\Documents\DocuTrac\QuicDoc Std\Data

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

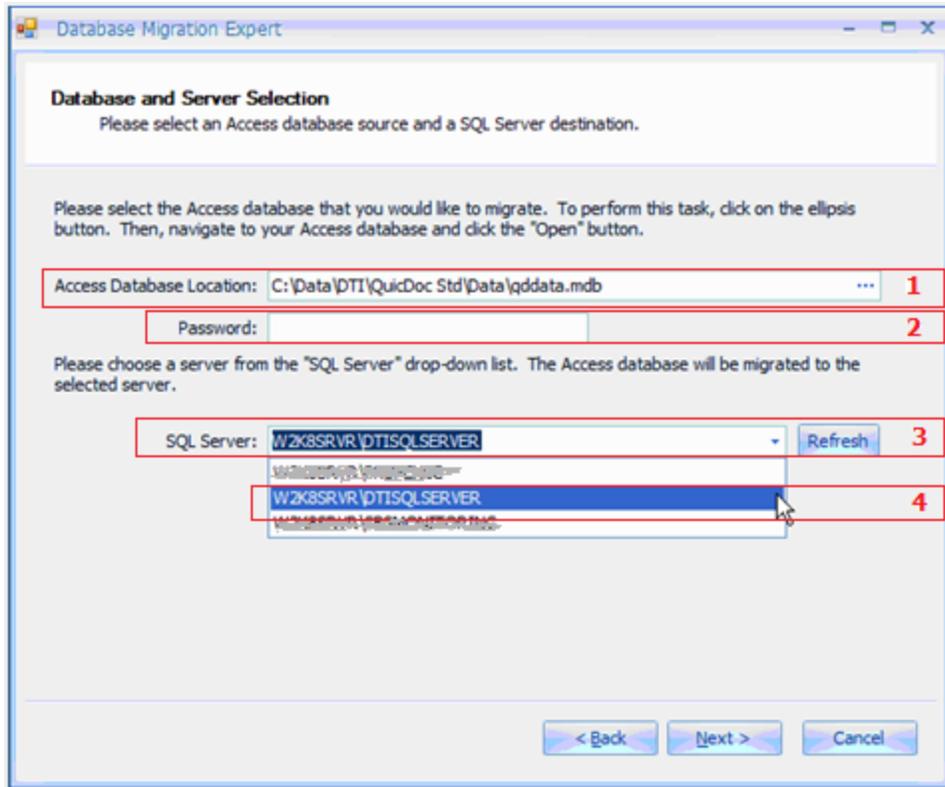
<<IMPORTANT: Make sure you have a backup of your databases before you perform the migration.>>

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

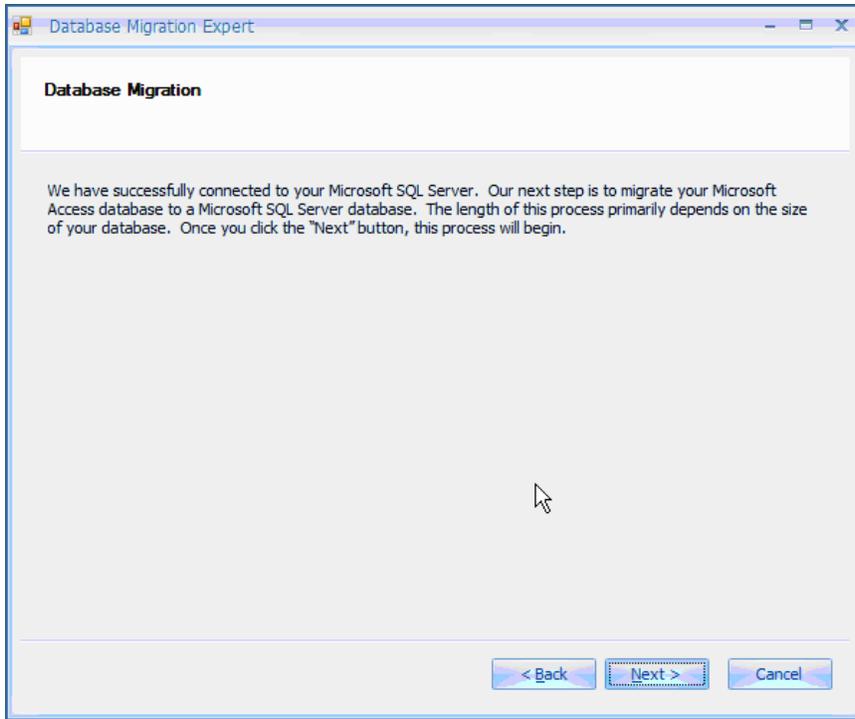
Select **All Programs...QuicDoc and Office Therapy...QuicDoc Migration Wizard** from the **Start** button.



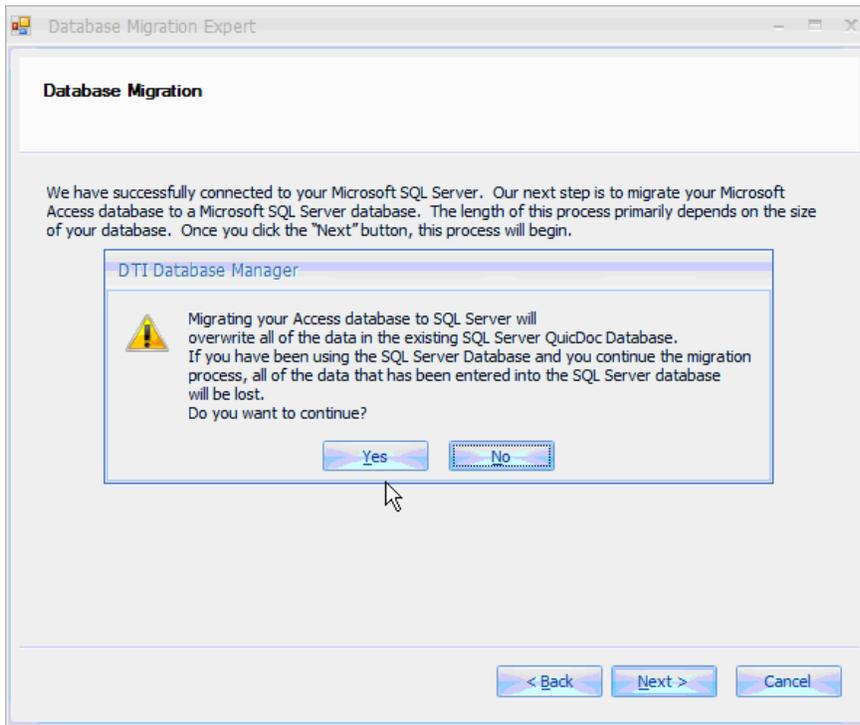
Click **Next**



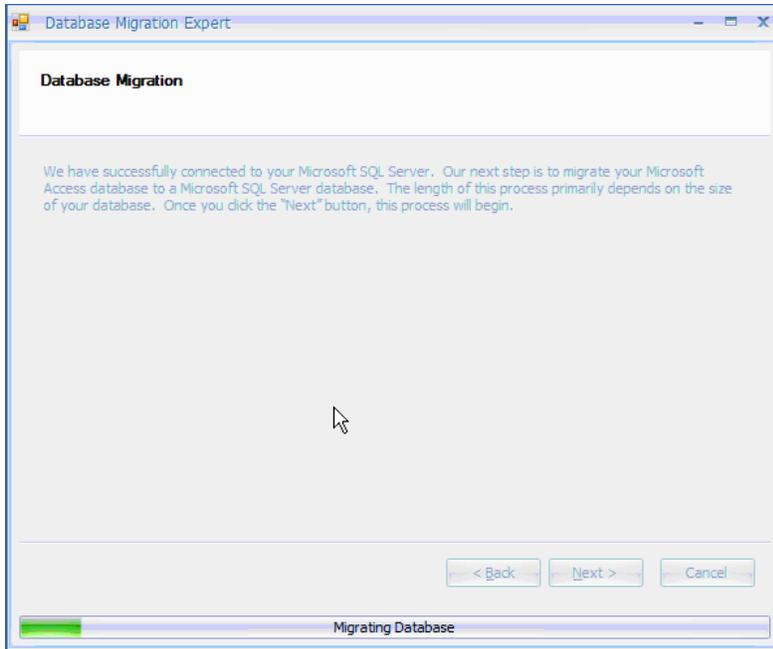
1. First click the ellipsis button [...] to navigate to your QuicDoc databases and select **QDData.MDB**
2. If you have set a password for your QuicDoc Database, enter it; otherwise, leave blank
3. Click the **Refresh** button for the Wizard to search for and list SQL Servers on your PC or Network
4.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



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



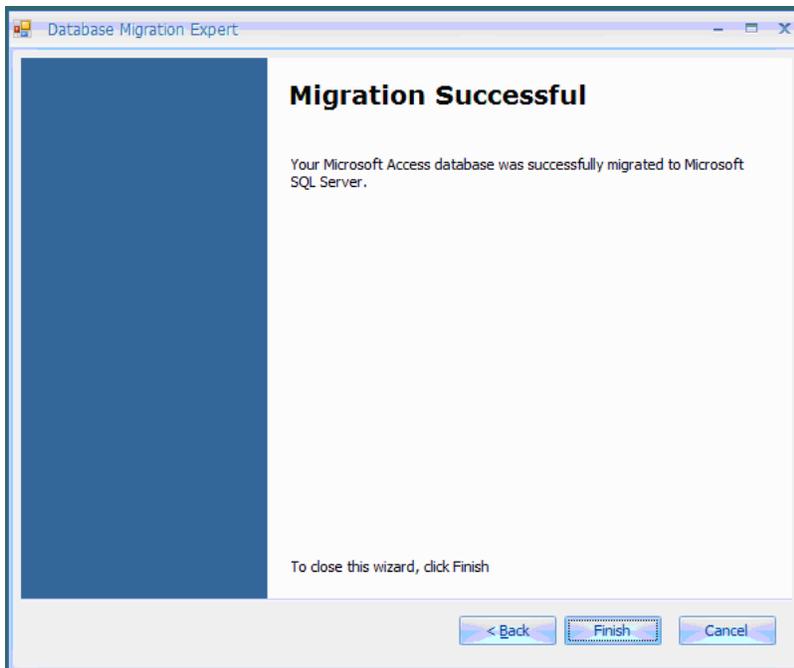
Caution: If you have already migrated your Access database, DO NOT repeat the process. The Wizard will overwrite the SQL Server QuicDoc database and you may lose data entered after migrating the first time. If this is the first time migrating the older QuicDoc database, click **Yes** to continue.



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:

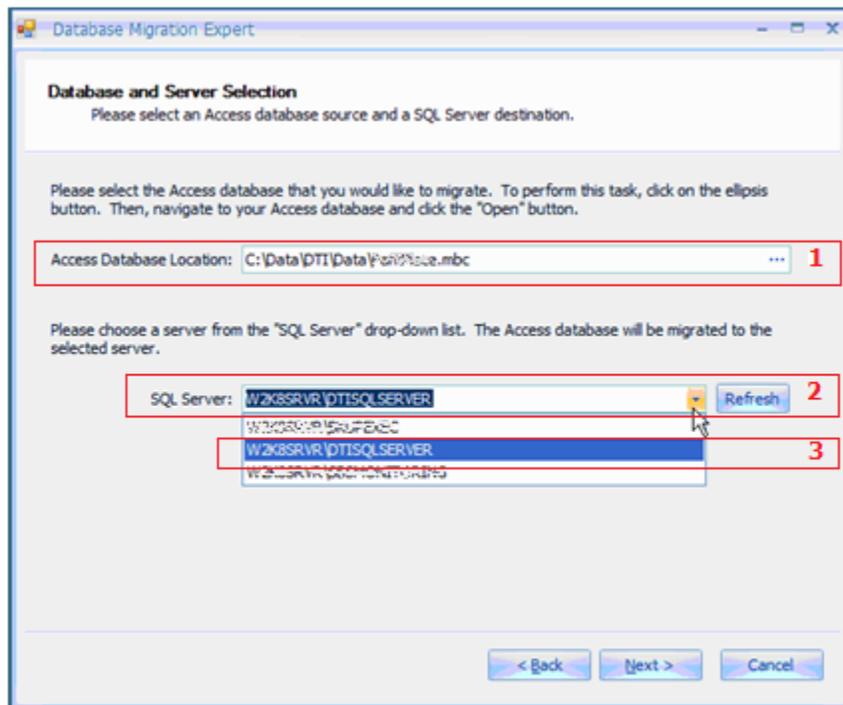
XP: C:\Documents and Settings\All Users\Documents\DocuTrac \Office Therapy\Data

Vista 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 .MBC

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

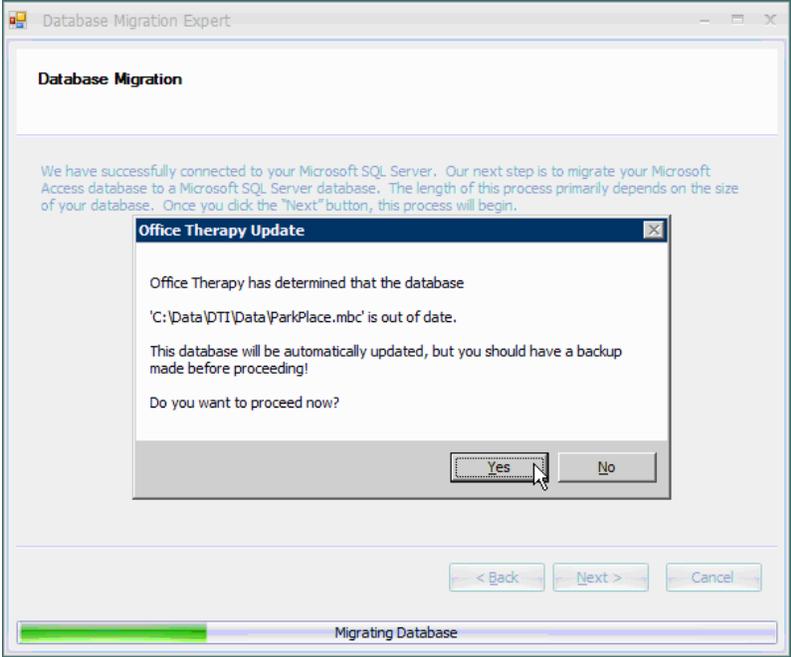
Select **All Programs...QuicDoc and Office Therapy...QuicDoc Migration Wizard** from the **Start** button.



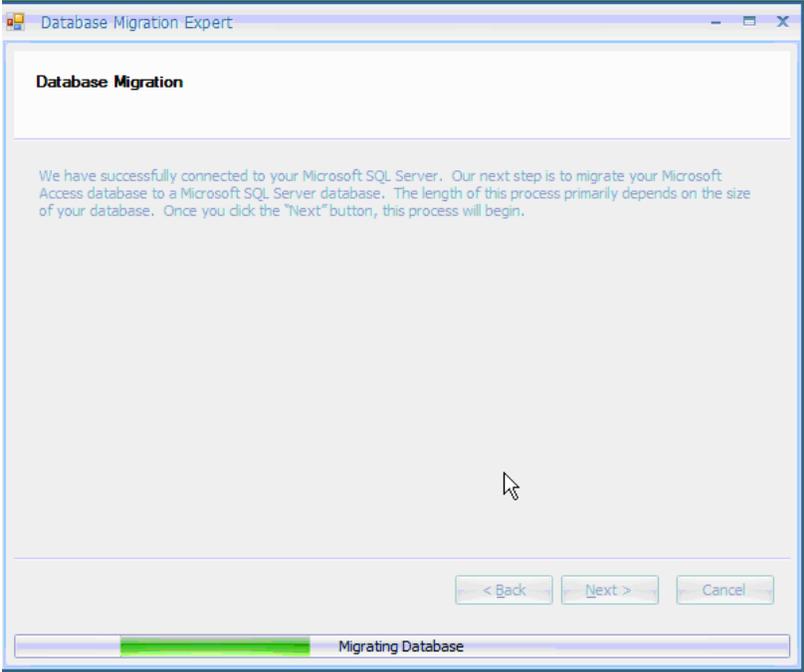
1. First click the ellipsis button [...] to navigate to your Office Therapy database and select it
2. Click the **Refresh** button for the Wizard to search for and list SQL Servers on your PC or Network
3. Select the **DTISQLSERVER** instance
4. Click **Next** to continue

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.

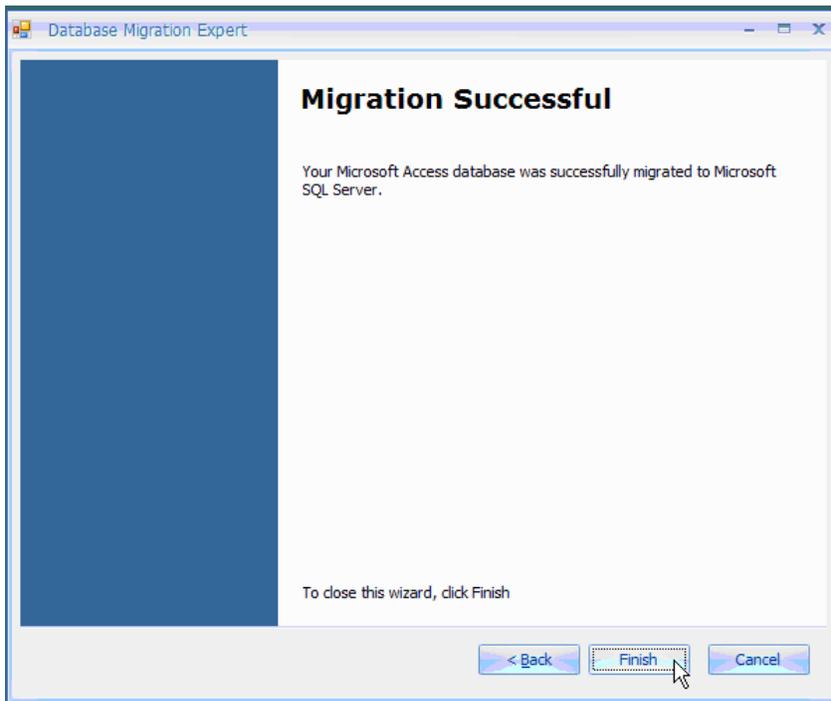
Click **Yes** to update it.



The Wizard will now migrate the database.



When done you will see the following screen.



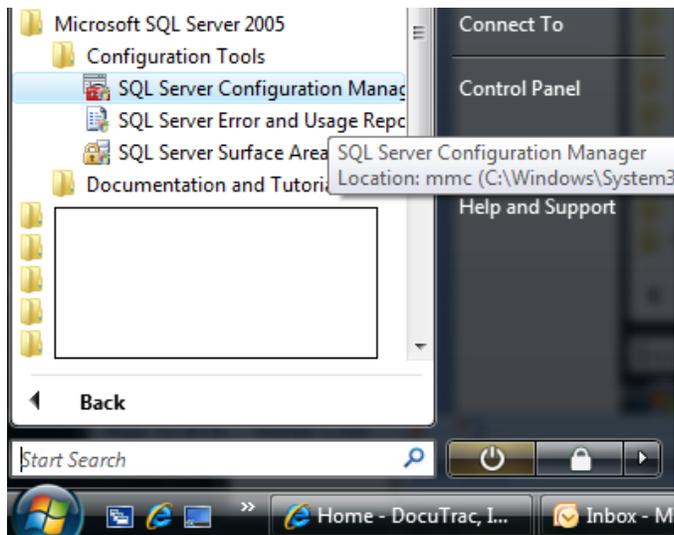
Again, remember

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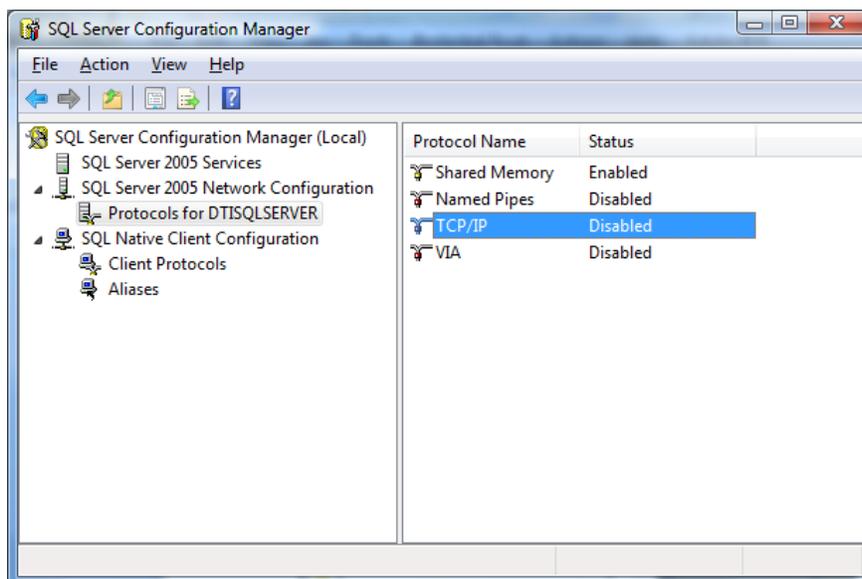
Running on a Network?

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.

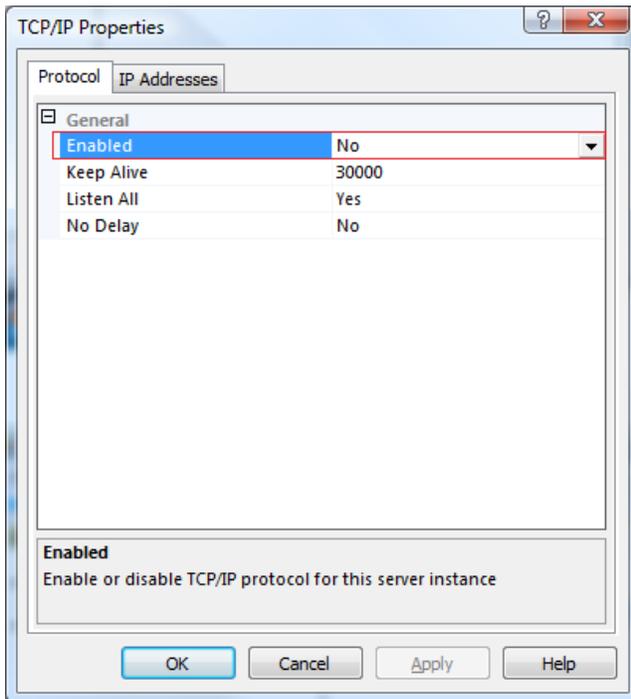
To check the settings and modify them if necessary, select the SQL Server Configuration Manager from your Start button. Click **Start...Microsoft SQL Server 2005... SQL Server Configuration Manager**



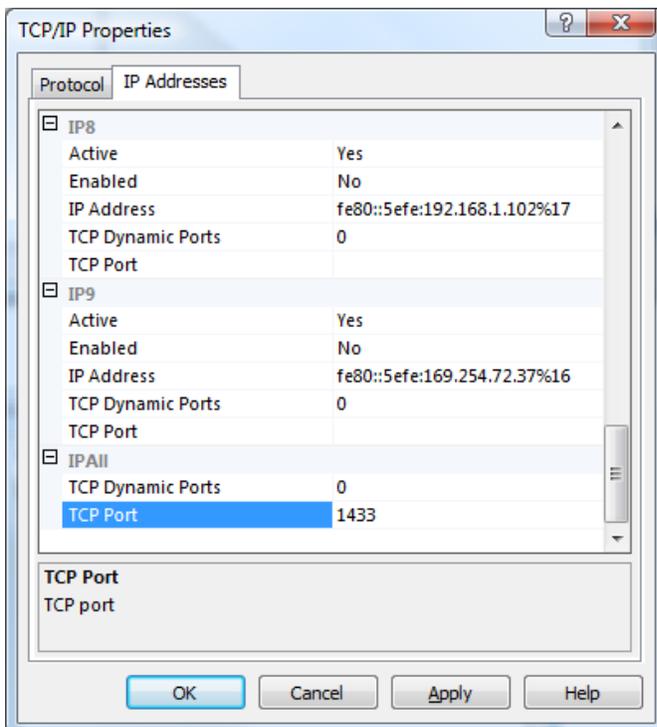
On the left side, expand **SQL Server 2005 Network Configuration** and select **Protocols** for DTISQLSERVER. Make sure that **TCP/IP** is Enabled. If it is not, double-click to go to the **Properties** to change it.



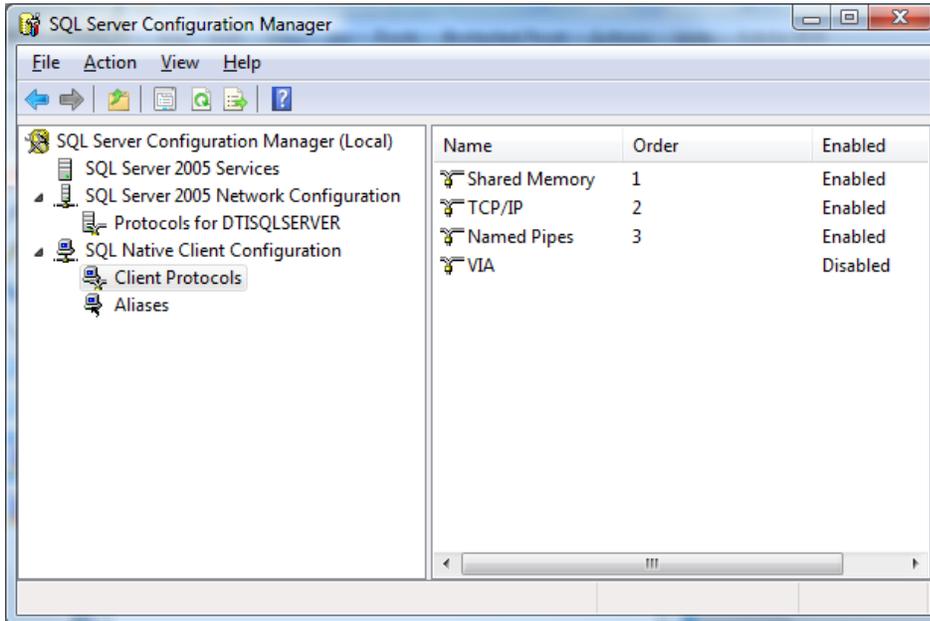
Select **Enabled** and use the drop-down to select **Yes**.



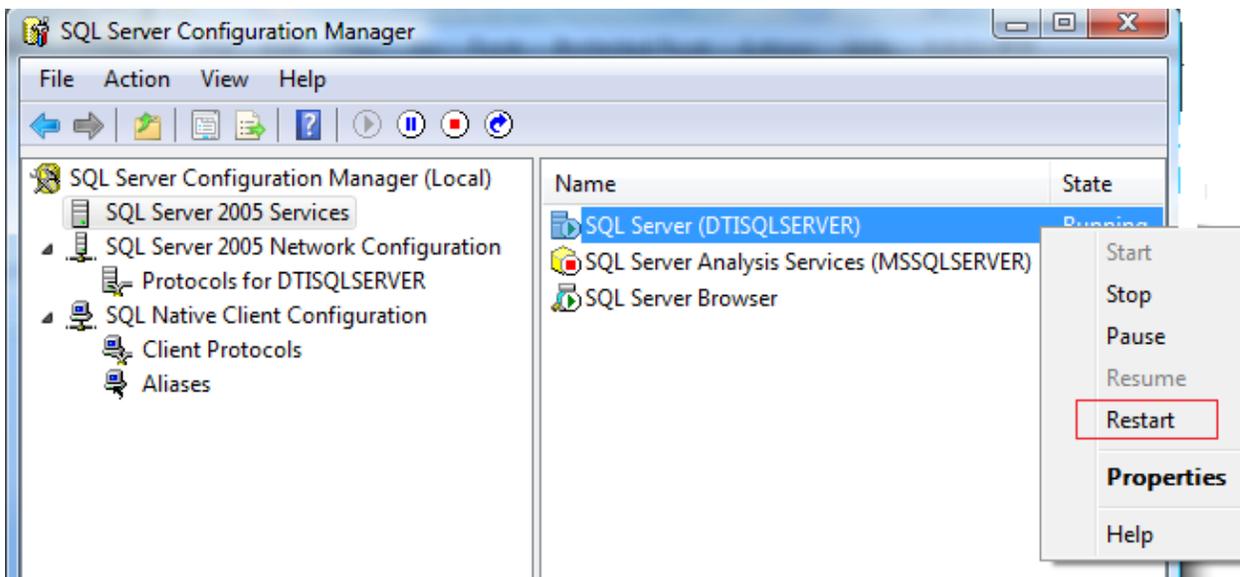
Select the **IP Addresses** tab, scroll to the bottom until you see **IP All** and set the **Port**. In most cases you can set this to **1433**



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.



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 (DTISQLSERVER)** on the right, and click **Restart**. Do the same for the SQL Server Browser.



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