CS WinOMS Practice Management Software Server Migration Help Guide

What the office will need:

A) The WinOMS CS install disk. Install files can be downloaded to server via FTP, contact Support to start download if needed.
B) If possible, keep the name and IP address of the new server the same as the old server.
C) Keep the share name of the WinOMSCS folder the same as the old share.

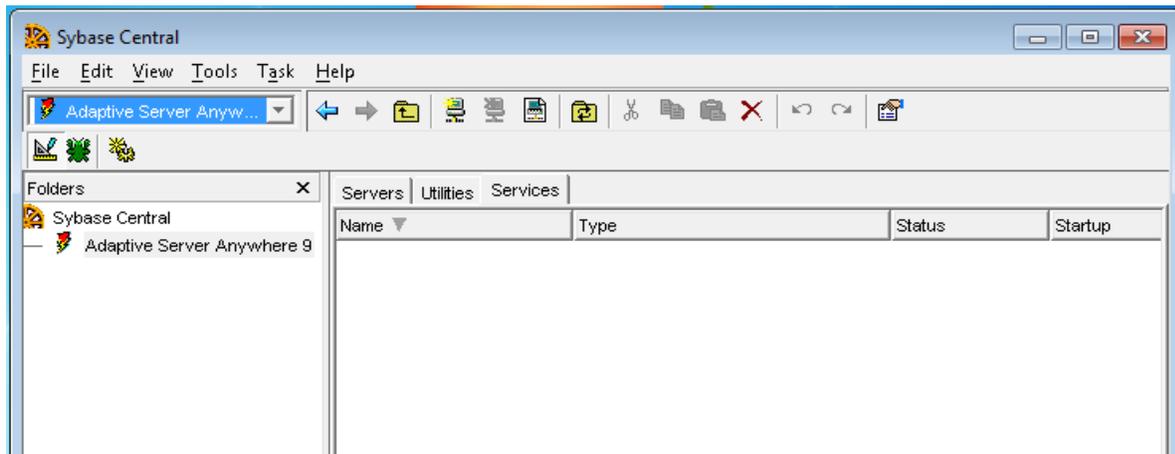## Steps on the OLD outgoing server:

1. Open the Sybase (SQL) Central icon on the desktop.
2. Double click on Adaptive Server Anywhere 9. Select **Services** tab on top of right pane.
3. Right click on SQLMDS> select **Stop**.
4. Right click on SQLMDS>Properties>General. Set the Startup type to **Disabled** and exit Sybase Central.
5. In the task bar, right click on PracticeWorks server (*gold key*) >Exit PracticeWorks Server.
6. Rename the PracticeWorks server (*gold key*) to pwsvr.exe_OLD located in (example) F:\WinOMSCS\PWSvr directory.
7. In the WinOMSCS folder, locate the PWSvr and MDCSRegistered folders and rename them to _OLD.
8. Copy the entire WinOMSCS folder from the OLD SERVER to the NEW SERVER. The WINOMSCS folder **MUST** be on the root of the drive, Ex: E:\WinOMSCS\.**Turn off the old server or remove the server from the network.**

Steps on the NEW server:

9. Share the WinOMSCS folder with the **old** share name (usually MDCS or WinOMSCS).
10. For sharing and security permissions, set Everyone = Full Control, same for Domain users / Authenticated Users groups, if used.
11. **Please ensure .NET 3.5 Framework is installed for WinOMSCS versions 8.3+.** Windows Server 2008 (32 and 64 bit versions) .NET 3.5 is pre-loaded, but must be enabled. This is located in *Server Manager > Features*. Reboot is **required** after install / enable.
12. Insert the CS WinOMS install disk. For detailed installation instructions with screen shots, please select '*Install Guide*' on main screen. If disk does not launch automatically, on DVD drive locate D:\WinOMSInstMenu.exe, where D:\ is your DVD drive letter.
13. If disk was saved to the server via FTP, share the actual folder where the files are located, *Ex: E:\8.5 disk\8.5\WinOMSInstMenu.exe* – '8.5' being the shared folder
14. Map a drive to the folder containing the menu file, as listed above. *Ex: map X:\ to \\server\winomscs\8.5\.* Launch the file from the mapped drive.
15. Select New Install – Server Side option. Sybase will be installed automatically. Restart the server when prompted. The CS WinOMS install will complete after reboot.
16. Select 'OK' when prompted that mdsdb file is present and WILL **NOT** be overwritten.

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17. Once the Server Side install is complete configure the Sybase SQLMDS service and start the database service, see *Configuring Sybase* steps below. If an '*Unknown'* error is generated when starting the SQLMDS service, see *Unknown Error* steps below.
18. Copy the license file (PWLF.dat) from the PWSvr_OLD folder to the current PWSvr folder.
19. Make sure the PWSvr (gold key) is running in the system tray. If hidden, set to show icon and notifications [Show additional System tray icons> choose Customize. Set PWSvr.exe to Show Icon and Notifications].
20. If key is not running in System Tray, make sure the server's PWClient path is set to drive letter path. See *Updating PWClient Path* below. Double click on PWSvr.exe file to launch.
21. If the name of the new server is different from the old server please run D:\WinOMSCS\cstoolkit.exe [replace D:\ with the correct drive letter where the WinOMSCS directory is located] and correct the server directory (see steps below).
22. If the new server name is different, PWClient path for all workstations must be updated. Please see *Updating PWClient Path* section below.
23. **If the practice has remote office locations connecting to the server via VPN, please update the server IP address entered in the ODBC data connection on the remote workstations.**

    a. In 32 bit workstations: Control Panel > Administrative Tools > Data Sources (ODBC) > System DSN tab > Configure MDCS > Network tab > TCP/IP box is checked. Enter in field 'Host=xxx.xxx.xxx.xxx' where X is Winomscs server's static IP address.

    b. In 64 bit workstations: Browse to C:\Windows\SysWow64\Odbcad32.exe. Follow steps above for section 'a'.

24. Add exception for any software or hardware firewalls. File to be excluded / allowed is
        32 bit: C:\Program Files\Sybase\SQL Anywhere 9\win32\dbsrv9.exe
        64 bit: C:\Program Files\Sybase\SQL Anywhere 9\x64\dbsrv9.exe
        Firewall Port to allow is 2638 for UDP.
25. If updating software version as well as installing the new server launch the **WinOMSInstMenu.exe** from the disk again and select **Server Side – Update**. This will bring the database up to the version installed on the new server.
26. Configure nightly backups for new server. **WE DO NOT SUPPORT LIVE BACKUPS.** The Sybase SQL service for the database is **REQUIRED** to be STOPPED in order to ensure a valid copy of the database is made during backup process. Online backup services are supported, such as MozyPro; as long as the Sybase service is STOPPED prior to the backup initiating. Please see *Backup Information* on Page 5 for stop and start strings for the database.

Configuring Sybase 9.0 Services

1. Double Click on Sybase Central or SQL Central icon on the desktop.
2. Double Click on Adaptive Server Anywhere 9.
3. Select the Services Tab.
4. If SQLMDS is there make sure it has a green light. If not continue to the next step.
5. Select File> New Service.
6. Name the service '**SQLMDS'.** Click Next.
7. Select Network Database Server. Click Next.
8. Confirm the Sybase executable path is correct for the server's OS:
     For 32 bit: C:\Program Files\Sybase\SQL Anywhere 9**win32**\dbsrv9.exe
     For 64 bit: C:\Program Files\Sybase\SQL Anywhere 9**x64**\dbsrv9.exe
9. For Parameters enter:
     -n **SQLMDS** (data drive C, D, E, F, etc.):\WinOMSCS\data\mdsdb –x tcpip.
10. Local System Account and Allow service to interact with desktop must be checked.
11. Automatic Startup.
12. Start services now.
13. Finish.
14. SQLMDS will now be 'Running'. The icon will now have a green light.

Unknown Error Starting SQL Service in Sybase

When trying to start the database service, Sybase generates the following error: "The Service 'SQLMDS' has generated and unknown error". This error is caused by Sybase looking in the wrong place for the mdsdb.log file.
1. Open Sybase Central.
2. Click on Utilities tab.
3. Select 'Change log file settings'. Click on Next.
4. Browse to the database file, ex. C:\winomscs\data\mdsdb.db. Highlight and click 'Open'. Click on [Next]. Note the log file path, if the drive letter is incorrect, click [Next].

5. Verify that 'Maintain the following transaction log file' box is checked. Correct the log file path drive letter. Click on [Next].
6. Verify that 'Maintain the following mirror log file' option is *NOT* checked. Click on [Next].
7. Accept the defaults.
8. Click on [Finish].

Update the server directory with CSToolkit

1. Launch cstoolkit.exe in the root of the WinOMSCS folder [ex. E:\Winomscs\cstoolkit.exe].
2. Select the Server Directory Assignment Tool, which is the first option.
3. Click on the green arrow.
4. Click the drop down and select practice name.
5. Enter in the correct UNC path to the WinOMSCS directory [Ex: \\server\winomscs\].
6. Click Apply and OK.

Update the PWClient Path

For 32 Bit Operating systems:
>   Go to Start> Run>Type in PWCLIENT.

For 64 Bit Operating systems:
>   Go to C:\Windows\SysWow64\PWCLIENT.EXE

1. Click Options.
2. On the server **ONLY**, set to driver letter path to PWSvr.exe [Ex: D:\WinOMSCS\PWSvr\].
3. On the workstations, change the path to the new UNC path to the gold key on the server [Ex: \\SERVER\MDCS\PWSVR\]. Click Ok and Close.
4. Log into the software.

Note: Please make sure the workstations can browse via UNC path to the NEW SERVER. Any Password prompts need to be turned off or Server credentials need to be entered to allow Client side to connect to the server.

Important backup information for WinOMS CS customers using Sybase version 9

Starting with the WinOMS CS v7.0 update, Sybase version 9 installs onto your system.

Your network server needs to be configured to automatically stop and start your database service as part of your daily backup process, and you may need the commands that are used to stop and start your Sybase database service.

Depending upon how your network administrator or hardware representative configured your backup system, these commands may be used in a variety of ways.

The commands below can be contained in a batch file on your server or they may be included as additional commands that your backup software automatically executes before and after your data backup occurs.

The example below demonstrates the database service stop and start commands for Sybase Adaptive Server Anywhere version 9.

Stopping the database service:

Net stop ASANYs_SQLMDS

Starting the database service:

Net start ASANYs_SQLMDS

In the examples above the name of the database service is **SQLMDS**. Please replace with the correct service name if different for the practice.

<u>**WE DO NOT SUPPORT LIVE BACKUPS.**</u> If your Sybase database service is not properly stopped before your database backup process is initiated, your WinOMS CS database will not be backed up, or may not be a valid functioning copy of your database.

After installing a WinOMS CS v7.0 or higher update, you should verify that your daily backup process continues to function normally and that in the event of a data catastrophe, you are able to restore your database from your most recent backup.

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