

Installing OfficeMate/ExamWRITER 12.0 for New Users or on New Computers

OfficeMate®
ExamWRITER®

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NOTES

- Before you install and activate OfficeMate/ExamWRITER, review the Hardware & System Specifications located at www.eyefinity.com/practice-management/officemate/sys-req.html.
- Ensure that you have the latest Windows updates and security patches installed on the server and each workstation and that your Windows security settings are properly applied. For more information on Windows security settings, read knowledge base article #000007881 in the [Eyefinity Support Community](#).

Downloading OfficeMate/ExamWRITER 12.0

1. Create a folder called **OfficeMate Updates** on your network where it can be accessed by all of the workstations.
2. Download and save the installation files. The links to the downloads can either be found in the email that you received regarding downloading and installing the software or on Eyefinity.com.
3. Copy the installation files from the network to each computer.

NOTE

Eyefinity strongly advises you to run the installation files from a local disk on each computer. Running the installation files directly from the network on multiple computers simultaneously may result in errors.

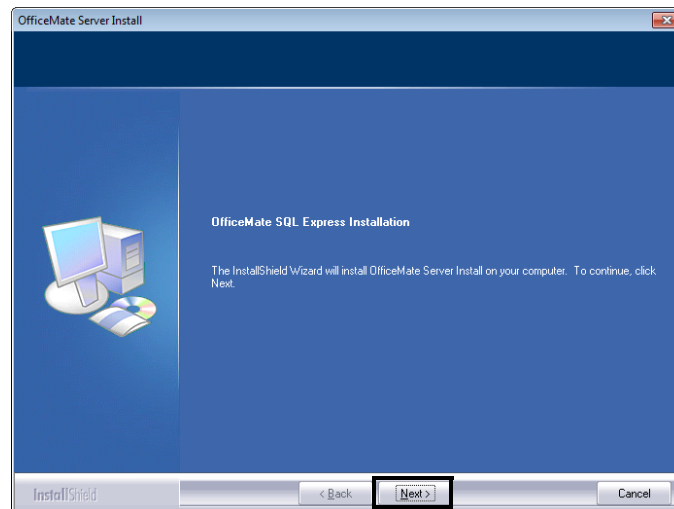
Installing OfficeMate Server

NOTES

- OfficeMate Server only needs to be installed on a server or a stand-alone workstation and does *not* need to be installed on more than one computer in the practice.
- Eyefinity recommends turning firewalls off during installation to minimize network issues. Review the network requirements at www.eyefinity.com/practice-management/officemate/sys-req.html#network for a list of default ports.

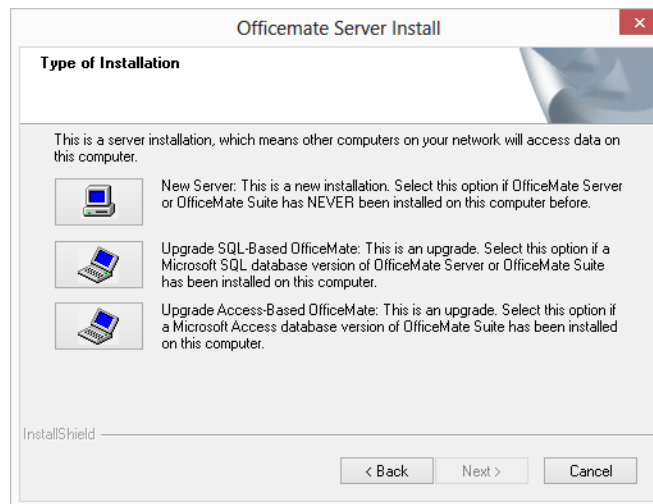
1. Close all applications on all computers and restart the server.
2. If you are installing OfficeMate/ExamWRITER in a networked environment, ensure that you are logged into the network or terminal server as a user with full local administrative access rights.
3. Disable all antivirus and screen saver programs that are running on your server.
4. Disable the User Account Control (UAC) feature to eliminate User Account Control error messages while using OfficeMate/ExamWRITER.
 - a. Click **Start**.
 - b. Select **Control Panel**.
 - c. Click **User Accounts**.
 - d. Click the **Change User Account Control settings** link.
 - e. Move the slider down to **Never notify**.
 - f. Click **OK**.
 - g. Close the Control Panel.
5. Navigate to the **OfficeMate Updates** folder on your local hard drive. If your download folder has a different name, navigate to that folder.
6. Double-click **OMServer_12.0.2.exe**.

The OfficeMate Server Install wizard opens and verifies that your server meets the hardware and system requirements.
7. Click **Next** to proceed.

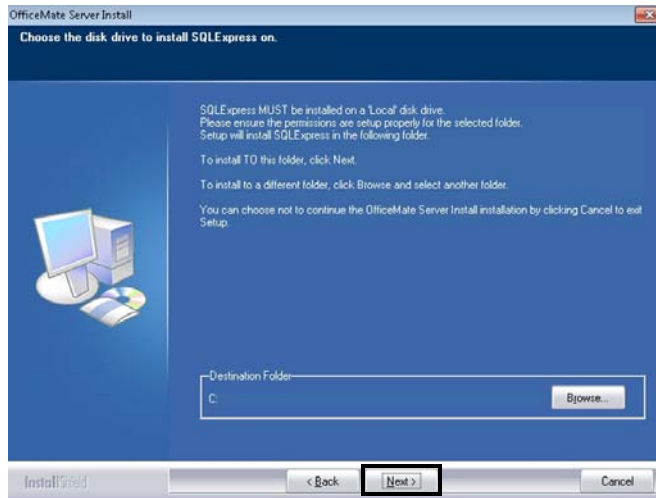


8. Select the option that best describes how you will use OfficeMate/ExamWRITER on this computer.
 - *New Server.* Select this option if this is a new installation (OfficeMate Server nor OfficeMate/ExamWRITER has been installed on this computer before). Other computers will access the OfficeMate data on this computer.
 - *Upgrade SQL-Based OfficeMate.* Select this option if you are upgrading an existing OfficeMate Server or OfficeMate/ExamWRITER that uses a SQL database. Other computers will access the OfficeMate/ExamWRITER data on this computer.
 - *Upgrade Access-Based OfficeMate.* Select this option if you are upgrading an existing OfficeMate/ExamWRITER program that uses an Access database. Other computers will access the OfficeMate/ExamWRITER data on this computer.

NOTE To determine if your existing OfficeMate/ExamWRITER installation uses a SQL database or an Access database, open OfficeMate or ExamWRITER, click **Help**, and select **About**. The Database field displays the database type.

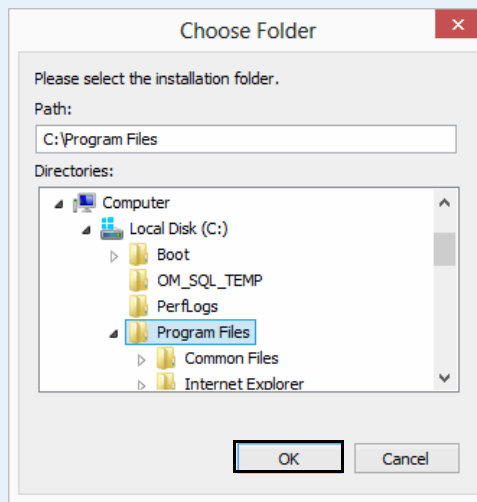


9. If prompted, select a location in which to install SQL Express and click **Next**.

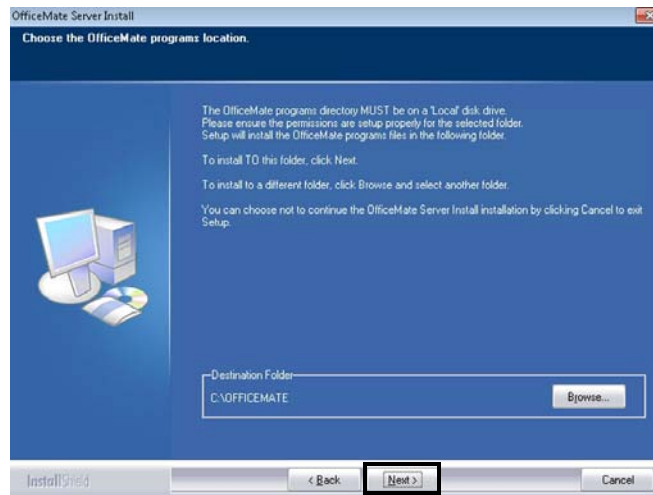


NOTE

The default location is **C:**. If you want to install SQL Express in a different location, click **Browse**, navigate to the folder on the server, and click **OK**.



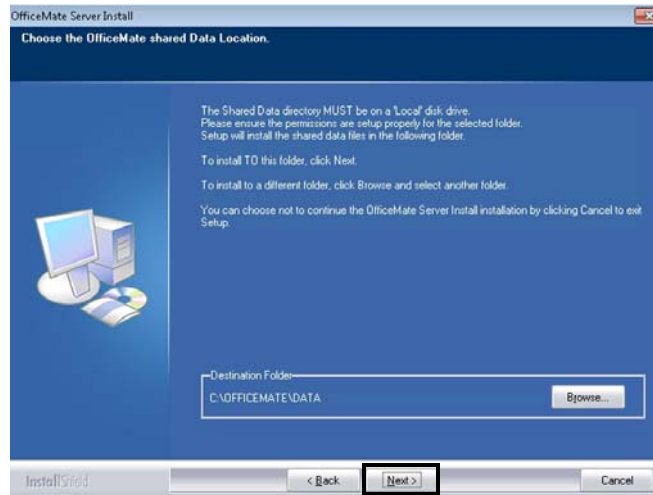
10. Select a location in which to install the OfficeMate/ExamWRITER programs and click **Next**.



NOTE

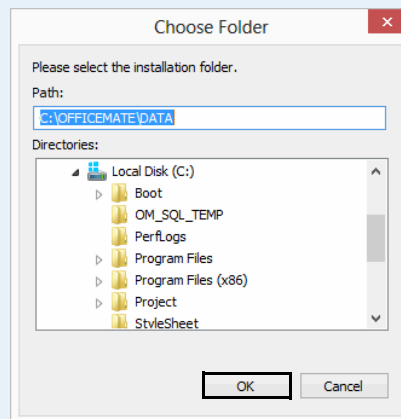
The default location is **C:\OfficeMate**. If you want to install the OfficeMate/ExamWRITER programs in a different location, click **Browse**, navigate to the folder on the server, and click **OK**.

11. Select the location in which you want to save the OfficeMate/ExamWRITER data and click **Next**.

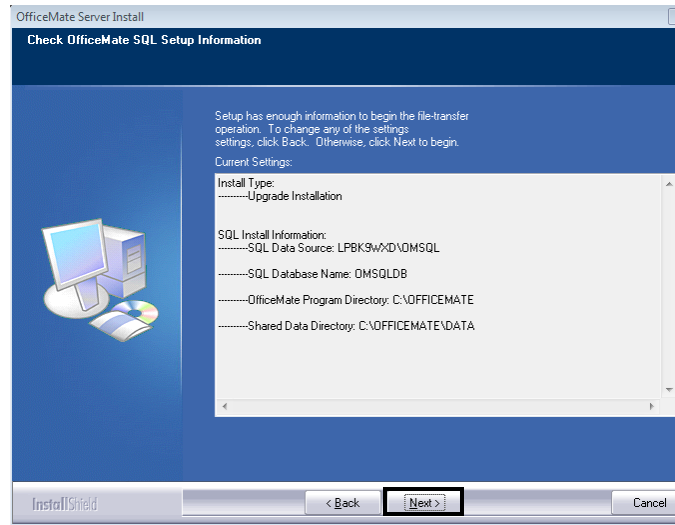


NOTE

The default location is **C:\OfficeMate\DATA**, but your data may reside in another location. Click **Browse**, navigate to the folder on the server, and click **OK**. The location you choose must be shared with full access so other computers on the network can access the OfficeMate/ExamWRITER data.

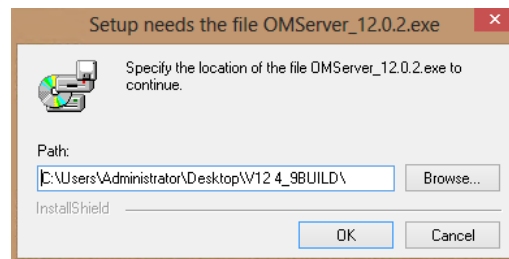


12. Review the OfficeMate/ExamWRITER SQL setup information and click **Next**.

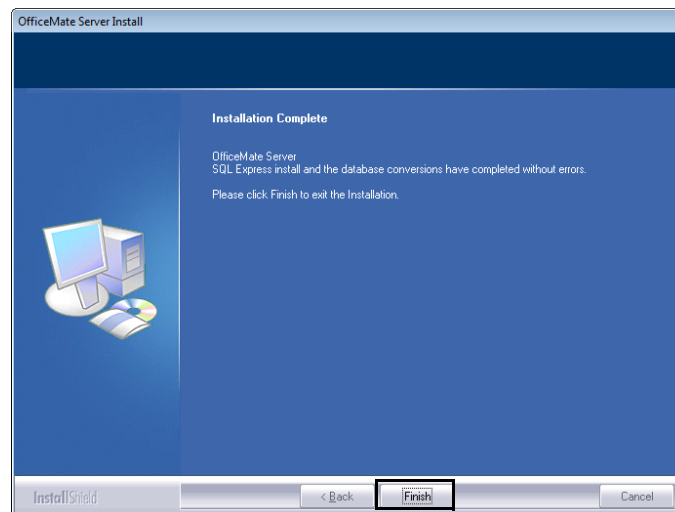


The OfficeMate SQL Install wizard configures and installs Microsoft SQL Server 2008 Express and, if necessary, converts your data from Access to SQL. This may take several minutes or a few hours.

13. If a window opens and asks you to specify the location of the OMServer.exe to continue, click **OK**.



14. When the installation is complete, click **Finish**.



15. After OfficeMate Server is installed, continue by installing OfficeMate/ExamWRITER on your workstations. For more information go to “Installing OfficeMate/ExamWRITER” on page 8.

NOTE The OfficeMate/ExamWRITER software is not required to be installed on a dedicated server. Install the OfficeMate/ExamWRITER software on the server only if you plan to also use the server as a workstation.

Installing OfficeMate/ExamWRITER

- NOTES**
- If you are installing OfficeMate/ExamWRITER on a server (so that it can also be used as a workstation) or on an individual workstation (with no server networked to it), you must first install OfficeMate Server. You must install OfficeMate Server on your server *prior* to installing the OfficeMate/ExamWRITER on any of your workstations; otherwise, you will receive errors and OfficeMate/ExamWRITER will not be able to properly connect to the sever. For more information about installing OfficeMate Server, go to “Installing OfficeMate Server” on page 2.
 - Eyefinity recommends turning firewalls off during installation to minimize network issues. Review the network requirements at www.eyefinity.com/practice-management/officemate/sys-req.html#network for a list of default ports.
 - You can install OfficeMate/ExamWRITER on multiple computers simultaneously.
 - Copy the installation files from your network to a local drive on each computer. It is not recommended that you run the installation off the network. This note does not apply to users who run OfficeMate/ExamWRITER through Terminal Server.

For more information on sharing data files, see the "Sharing Folders" document at www.eyefinity.com/dam/eyefinity/documentation/OM/Sharing-Folders.pdf.

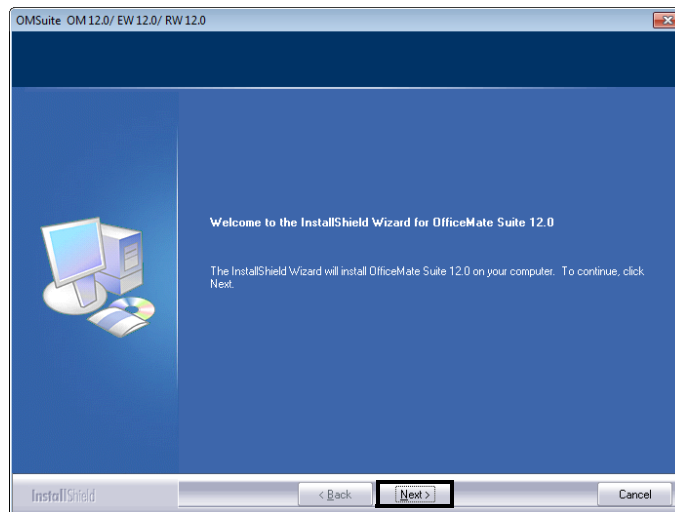
For more information on mapping network drives, see the "Mapping Network Drives" document at www.eyefinity.com/dam/eyefinity/documentation/OM/Mapping-Network-Drives.pdf.

1. Close all applications on all computers and restart each computer.
2. If you are installing OfficeMate/ExamWRITER in a networked environment, ensure that you are logged into the network or terminal server as a user with full local administrative access rights.
3. Disable all antivirus and screen saver programs that are running on your computer(s).
4. Disable the User Account Control (UAC) feature on *all* computers to eliminate User Account Control error messages while using OfficeMate/ExamWRITER.
 - a. Click **Start**.
 - b. Select **Control Panel**.
 - c. Click **User Accounts**.
 - d. Click the **Change User Account Control settings** link.
 - e. Move the slider down to **Never notify**.
 - f. Click **OK**.
 - g. Close the Control Panel.

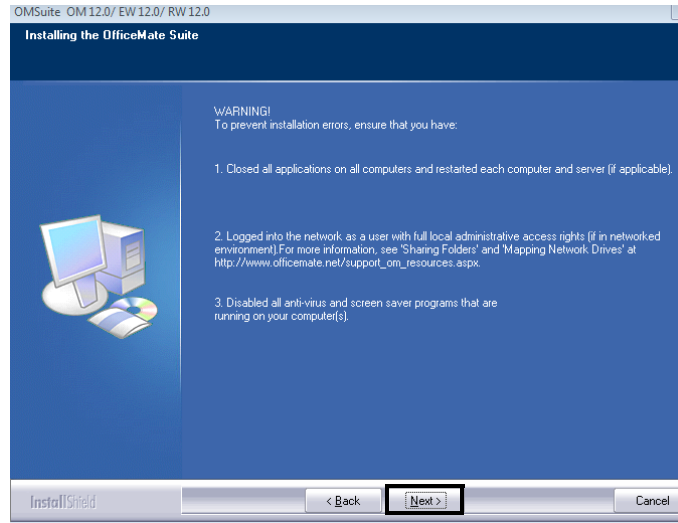
NOTE Complete steps 5–13 on each computer from which you plan to run OfficeMate/ExamWRITER.

5. Navigate to your **OfficeMate Updates** folder. If your download folder has a different name, navigate to that folder.
6. Double-click **OMSuite_12.0.2.exe**.

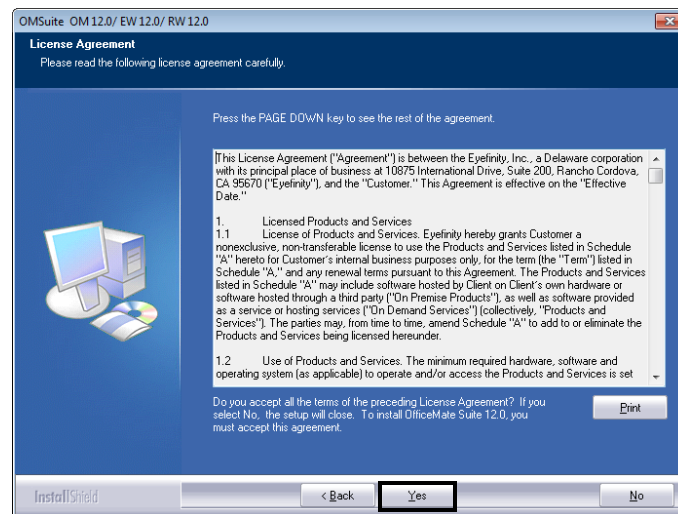
The InstallShield wizard begins and verifies that your computer meets the hardware and system requirements.
7. Click **Next**.



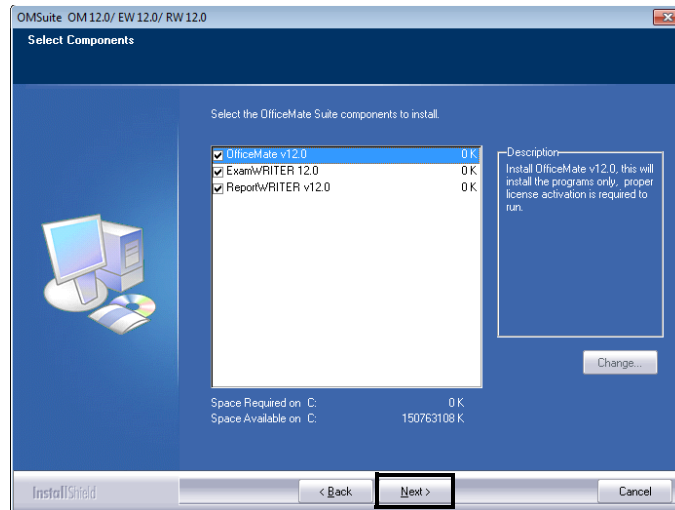
8. Read the warning message to prevent installation errors and click **Next**.



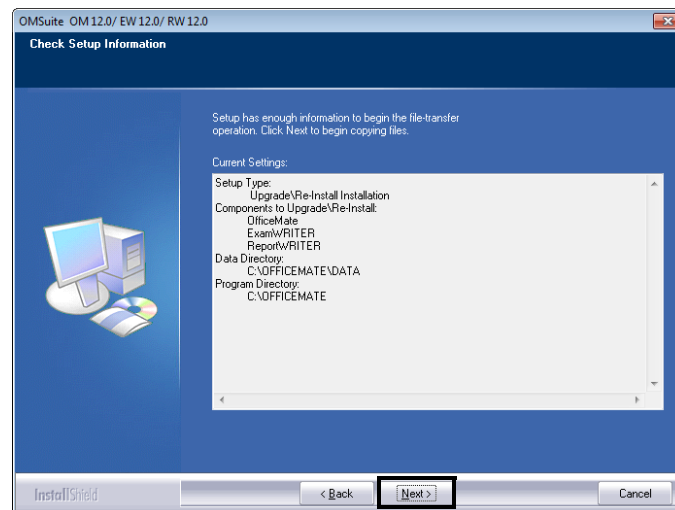
9. Click **Yes** to accept the License Agreement.



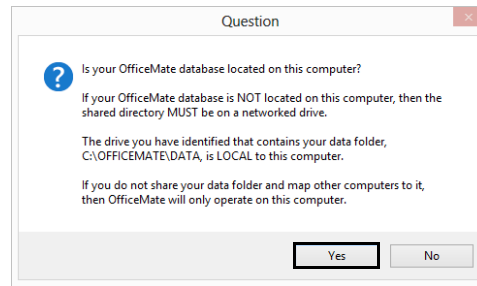
10. Select all of the OfficeMate Suite components and click **Next**.



11. Check the setup information and click **Next**.

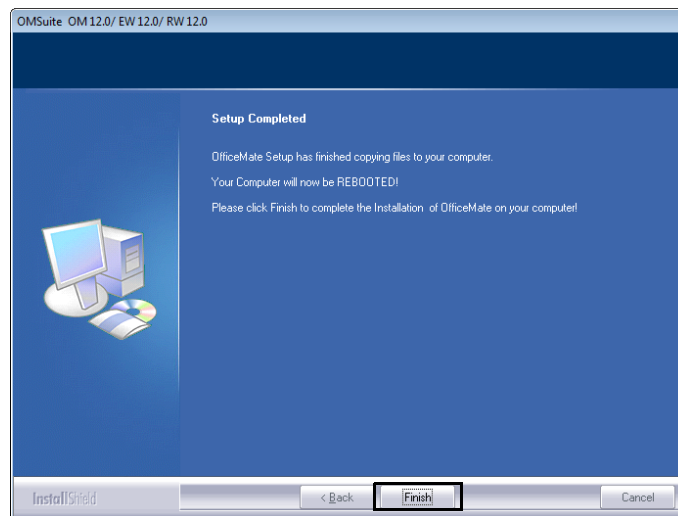


12. If you selected a local disk drive, a dialog box asks you to confirm that this computer is the OfficeMate server:
 - Click **Yes** if this computer is the server and you want to install OfficeMate/ExamWRITER here because you also want to use the server as a workstation.
 - Click **No** if this computer is not the server and to go back and select the network disk on which your OfficeMate/ExamWRITER data resides.



The installation begins. Depending on the programs that you are installing and the speed of your computers, the installation time will vary.

13. When the installation completes, click **Finish**.



Your computer reboots.

14. If your workstation is running a 64-bit operating system, copy the **3D-Eye Draw** folder from the C:\Program Files (x86) folder and paste it in the **C:\Program Files** folder.

15. Set the access privileges for folders that users will need to access:
 - a. Assign the **Everyone** group **Full Control** (Share) permissions to the following DATA directories:
 - Drive:\OfficeMate\DATA**
 - b. On each workstation, assign the local or domain users **List & Execute, Read, and Write (NTFS)** permissions to the following directories:
 - Drive:\OfficeMate**
 - Drive:\Program Files\3D-Eye Draw**
 - C:\Windows\omate32.ini**
 - c. On each workstation, assign the local or domain users **Modify, List & Execute, Read, and Write (NTFS)** permissions to the following directories:
 - Drive:\OfficeMate\DATA**

Installing Service Pack 12

OfficeMate/ExamWRITER 12.0.3 Service Pack 12 (SP12) fixes known issues with the initial release of OfficeMate/ExamWRITER 12.0 and introduces several new features. Perform the following steps to install SP12 on each computer running OfficeMate/ExamWRITER 12.0 in your practice:

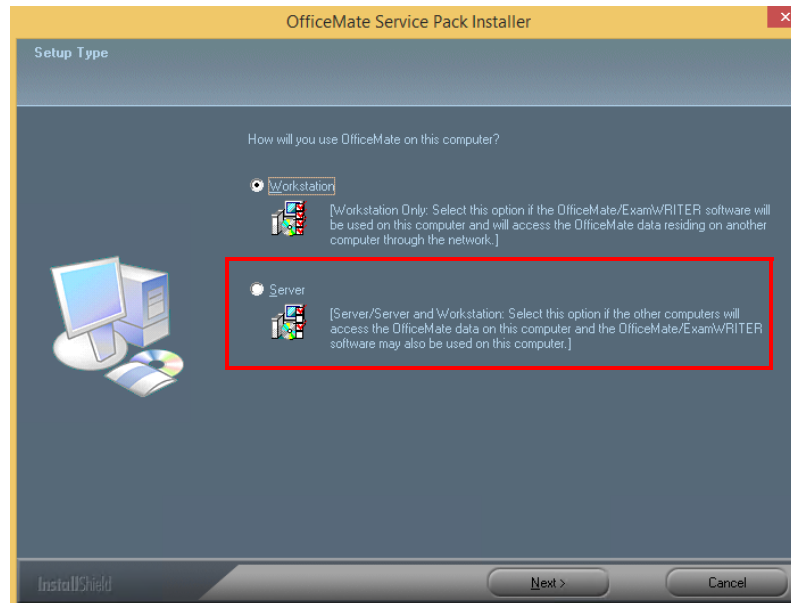
1. Verify that you have Microsoft .NET Framework version 4.6 installed on each workstation.

NOTES

- For instructions on how to verify your .NET Framework version, go to <https://docs.microsoft.com/en-us/dotnet/framework/migration-guide/how-to-determine-which-versions-are-installed>.
- To download .NET Framework version 4.6, go to <https://www.microsoft.com/en-us/download/details.aspx?id=48130>.

2. Close OfficeMate/ExamWRITER on every computer.
3. If you are installing the service pack in a networked environment, ensure that you are logged into the network or terminal server as a user with full local administrative access rights.
4. Ensure that all of your workstations are connected to the Internet.
5. On your server (or your main computer), navigate to your **OfficeMate Updates** folder on your network. If your download folder has a different name, navigate to that folder.
6. Double-click **12.0.3_SP12_Installer.exe**.
The installer opens and begins running.
7. Select the **Server** radio button.
Select this option if the other computers access the OfficeMate data on this computer and the OfficeMate/ExamWRITER software is also used on this

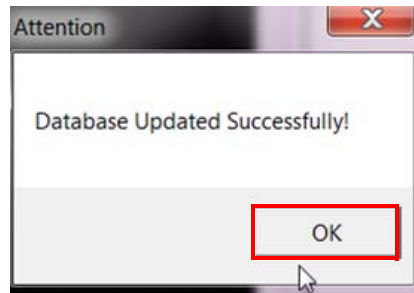
computer. In short, select this option only for the server in your practice. You will only select this option during one installation (on the server).



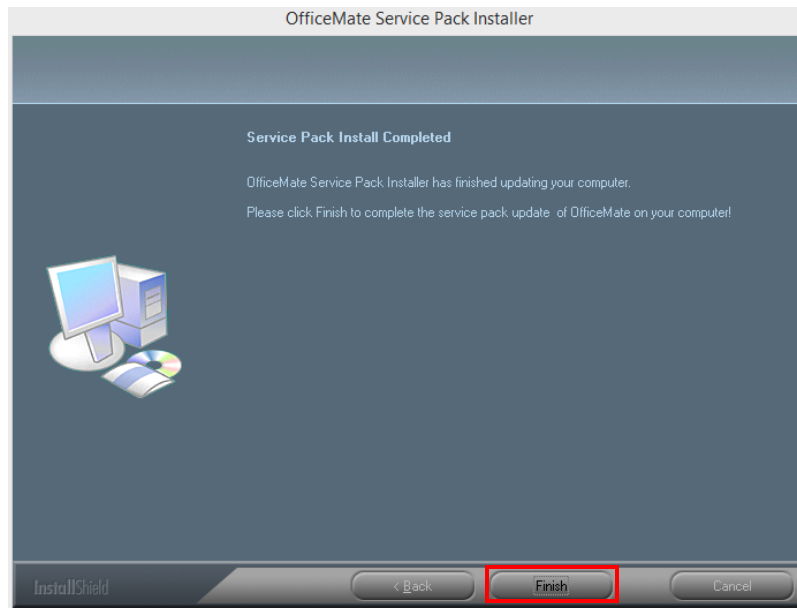
8. Click **Next**.
9. Click **OK** when you receive the Database Updated Successfully message.

NOTE

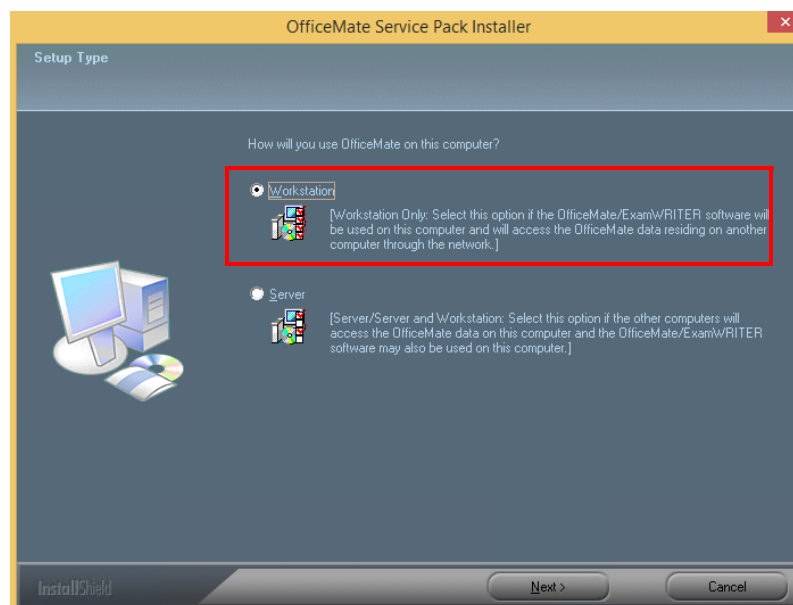
If your database update is unsuccessful, contact Customer Care at 800.942.5353.



- Click **Finish** when the installation is complete.



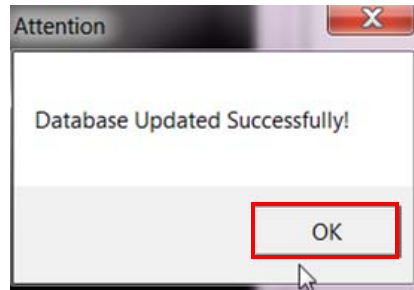
- On a workstation, navigate to your **OfficeMate Updates** folder on your network. If your download folder has a different name, navigate to that folder.
- Double-click **12.0.3_SP12_Installer.exe**.
The installer opens and begins running.
- Select the **Workstation** radio button.
Select this option if the OfficeMate/ExamWRITER software is used on this computer and accesses the OfficeMate data residing on another computer through the network. In short, select this option for all the non-server workstations in your practice.



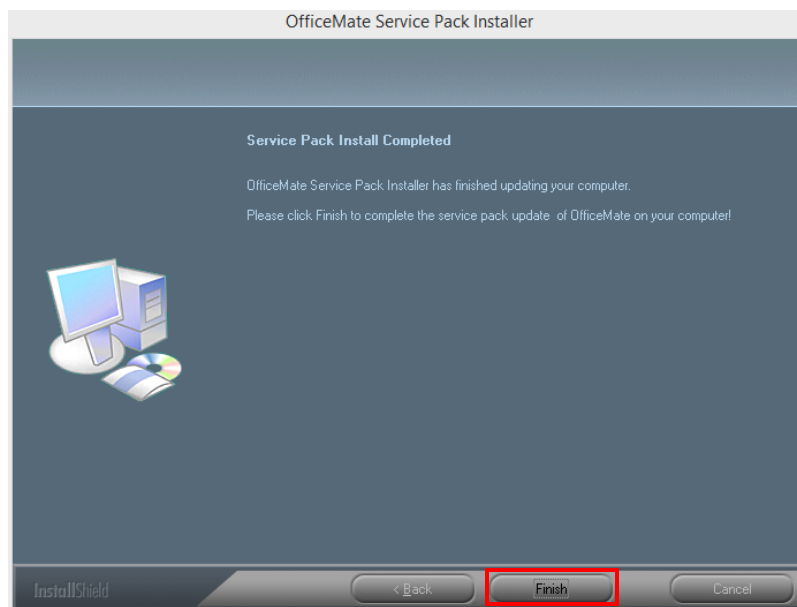
- Click **Next**.

15. Click **OK** when you receive the Database Updated Successfully message.

NOTE If your database update is unsuccessful, contact Customer Care at 800.942.5353.



16. Click **Finish** when the installation is complete.



17. Repeat steps 11–16 to install OfficeMate/ExamWRITER 12.0.3 SP12 on each additional workstation in your office.

Activating OfficeMate/ExamWRITER

NOTE You only need to activate OfficeMate/ExamWRITER on one computer. You do *not* need to activate OfficeMate/ExamWRITER on every computer on which it is installed.

You should receive an email from activation@officemate.net that contains your activation file. You may need to check your spam folder for this email.

1. Download your activation file by following the instructions in the email.
2. Double-click the activation file on any one of your workstations.
The activation begins.

3. Click **OK**.



Opening OfficeMate

1. Open OfficeMate using one of the following methods:
 - Double-click the **OfficeMate** icon on your desktop.
 - Click **Start**, select **Programs**, select **OfficeMate Software Solutions**, and select **OfficeMate**.

NOTE To view a comprehensive list of the new features and expanded functionality in OfficeMate/ExamWRITER, click **Help** on the main window toolbar and select **What's New?**

The login window opens.

2. Type **admin** in the **User ID** field and leave the Password field blank.
3. Click **OK**.
OfficeMate/ExamWRITER prompts you to change your password.
4. Leave the Old Password field blank.
5. Type your new password in the **New Password** field and again in the **Confirm New Password** field.
6. Click **OK**.
7. Select **Administration** from the list of OfficeMate applications and click **OK**.
8. Begin by setting up resources (providers and staff) and security. For more information about setting up resources and security, refer to the "Getting Started" chapter of the *OfficeMate/ExamWRITER User's Guide*, which is available from the **Help** menu within OfficeMate/ExamWRITER.