## Upgrading to OfficeMate/ ExamWRITER 12.0

# OfficeMate® ExamWRITER®

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NOTES	<ul> <li>If you are already using OfficeMate/ExamWRITER 12.0.2, then you <i>only</i> need to download and install the service pack. For more information on installing the service pack, go to "Installing Service Pack 12" on page 15.</li> </ul>
	<ul> <li>To find out what's new in OfficeMate/ExamWRITER 12.0, review the "What's New" documentation in the Eyefinity Support Community.</li> </ul>
	<ul> <li>Before you install and activate OfficeMate/ExamWRITER, review the Hardware &amp; System Specifications located at www.eyefinity.com/practice-management/officemate/ sys-req.html.</li> </ul>
	<ul> <li>If you are upgrading OfficeMate/ExamWRITER in a Remote Desktop Services environment, review the "Upgrading OfficeMate/ExamWRITER on a Terminal Server" document located at www.eyefinity.com/dam/eyefinity/documentation/ OM/Terminal-Server-Upgrade.pdf.</li> </ul>
	• 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

- Create a folder called **OfficeMate Updates** on your network where it can be accessed by all of the workstations running the OfficeMate/ExamWRITER programs.
- 2. Log into Eyefinity.com.
- 3. Click the Click here to upgrade OfficeMate/ExamWRITER! banner.
- 4. Click Next.

NOTE

A web page appears and displays the download links.

5. Download and save the installation files.

**NOTE** If you are already using OfficeMate/ExamWRITER 12.0.2, then you *only* need to download the service pack.

6. 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.

Setting Up Security Preferences in OfficeMate 9.0 and Earlier

Prior to upgrading to OfficeMate/ExamWRITER 12.0, you must set up security preferences. Security is required in OfficeMate/
ExamWRITER 12.0 so you must ensure that at least one user has all of the following check boxes selected in the User Security for Employee window:

- Access All
- Maintain User Security
- Access Home Office

The Access Home Office check box is available only to OfficeMate Enterprise users. If you are upgrading from OfficeMate 8.0 or below, you do not need to select the Access Home Office check box.

If you have already set up your security preferences or are upgrading from OfficeMate 9.5 or later, skip this section and go to "Installing OfficeMate Server" on page 4.

For more information on setting up security, watch the "Security" video.

- On the OfficeMate main window, click Setup, and select Security. The User Security for Employee window opens.
- 2. Select the user for whom you want to assign security access privileges. If the user is not listed, add him or her to OfficeMate and assign him or her a user ID in the Business Names window. Type the user's password in the **Password** and **Confirm PW** text boxes.

- 3. Select the appropriate check boxes under the Security Access tab.
  - NOTES Ensure that the Access All and Maintain User Security check boxes are selected for at least one user.
    - OfficeMate Enterprise users must also ensure that the **Access Home Office** check box is also selected.
    - Users that have the Access All, Maintain User Security, and Access Home Office check boxes selected in the User Security for Employee window can change any user's security preferences.
- 4. Select the Security Active? check box to activate security.
- 5. Click **OK**.
- If you activated security, type your user ID and password in the Welcome to OfficeMate window and click OK.

Welcome t	o Offic	:eMate
User ID	tomt	
Password	****	
	OK	Cancel

### Backing Up Your Data

Prior to installing the latest OfficeMate/ExamWRITER update, ensure that you have a validated backup of your OfficeMate/ExamWRITER database. Eyefinity does not provide support for backing up or restoring your database and recommends that you hire a certified operating system and network technician to advise you on recommended backup procedures.

For more information about backing up, refer your certified technician to Knowledge Base article #000012678 in the Eyefinity Support Community.

## Installing OfficeMate Server

For more information on backing up your data, see the "Backing Up and Restoring Data" document at www.eyefinity.com/ dam/eyefinity/ documentation/ OM/ Backing-Up-SQL-an d-Access-Database s.pdf.

NO	TES	•	OfficeMate Server only needs to be installed on a server or a stand-alone workstation and does <i>not</i> 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.
		•	If you are currently using Microsoft SQL Server Standard rather than Express, contact Eyefinity Customer Care at 800.942.5353 prior to proceeding.
1.	Clos	e al	I applications on all computers and restart the server.
2	If voi		Irrently use OfficeMate/ExamWRITER on an Access database ru

- If you currently use OfficeMate/ExamWRITER on an Access database, run the Repair Utility; otherwise, skip to step 3.
  - a. Navigate to the **C:\OMATE32** on your server (or workstation if you are using a dedicated server).
  - b. Double-click Repair.exe.

The Repair Warning window opens.

- c. Click Yes to begin the database repair process.
- d. Click Repair.

Your database is repaired.

**NOTE** If you encounter an error while running the Repair Utility, call Eyefinity Customer Care at 800.942.5353.

#### e. Click Close.

- 3. 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.
- 4. Disable all antivirus and screen saver programs that are running on your server.
- 5. 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.
- 6. Navigate to the **OfficeMate Updates** folder on your local hard drive. If your download folder has a different name, navigate to that folder.

#### 7. Double-click OMServer\_12.0.2.exe.

The OfficeMate Server Install wizard opens and verifies that your server meets the hardware and system requirements.

8. Click Next to proceed.



- 9. 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.

	Officemate Server Install
Type of Installa	ation
This is a server i this computer.	installation, which means other computers on your network will access data on
	New Server: This is a new installation. Select this option if OfficeMate Server or OfficeMate Suite has NEVER been installed on this computer before.
\$	Upgrade SQL-Based OfficeMate: This is an upgrade. Select this option if a Microsoft SQL database version of OfficeMate Server or OfficeMate Suite has been installed on this computer.
	Upgrade Access-Based OfficeMate: This is an upgrade. Select this option if a Microsoft Access database version of OfficeMate Suite has been installed on this computer.
nstallShield ———	
	Z Back Nevt > Cancel

- 10. If you are prompted to select your SQL database, perform the following steps:
  - a. Select the OfficeMate SQL instance from the Available SQL Instances column.
    - NOTETo determine your OfficeMate SQL instance, open<br/>OfficeMate on a workstation, click Help, and select About<br/>OfficeMate. The SQL instance is the second part of the<br/>server path (for example, if the server path is<br/>ServerName\OMSQL, OMSQL is the SQL instance).
  - b. Select the OfficeMate/ExamWRITER database name from the **Available Databases** column.
    - **NOTE** To determine your OfficeMate/ExamWRITER database name, open OfficeMate on a workstation, click **Help**, and select **About OfficeMate**. The database name is listed.
  - c. Click Update.

OfficeMate Change JNI Utility     SOL Server Name:MICHAEL 20BEAD6     Select the SQL Instance Name that your SQ     your SQLExpress database.	LExpress database is attached to. Then select the name of	×
Available SQL Instances: 1 OMSQL	Available Databases: 1 OMSQLDB	
SQLStatus SQL DataSource Ilame MICHAEL-20BEAD6\OMSQL	SOL Database Hame OMSQLD8	
	Update Exit	

#### Upgrading to OfficeMate/ExamWRITER 12.0 Installing OfficeMate Server

11. If you are prompted, choose the location of your current OfficeMate/ ExamWRITER data and click **Next**.

Choose the OfficeMate	shared Data Location.
	This Shared Data directory MUST be on a "Local" disk drive. Please ensure the permissions are setup properly for the selected tolder. Setup will instal the shared data files in the following tolder. To instal TO this folder, click Next. To instal to a different folder, click Browse and select another folder. You can choose not to continue the OfficeMate Server Install installation by clicking Cancel to ex Setup.
~~~	-Destination Folder- C:\OFFICEMATE\DATA Bjowse
Install Stield	<back cancel<="" lease="" td=""></back>

**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 you receive an error during the conversion, click Try Again.
  - **NOTE** If you receive the error after clicking Try Again, click **Quit** and restore your prior OfficeMate/ExamWRITER version.

If your database was not previously encrypted, you are prompted to ensure that you have a backup copy of your database. The upgrade process will encrypt your database after this point to protect your data.

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



15. Ensure that you have backed up your database and click Yes to continue.



#### Upgrading to OfficeMate/ExamWRITER 12.0 Installing OfficeMate Server

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



- 17. After OfficeMate Server is installed, continue by installing OfficeMate/ ExamWRITER on your workstations. For more information go to "Installing OfficeMate/ExamWRITER" on page 11.
  - **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	<ul> <li>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 <i>prior</i> 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 4.</li> <li>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.</li> <li>You can install OfficeMate/ExamWRITER on multiple computers simultaneously.</li> <li>Copy the installation files from your network to a local drive on each computer. It is not recommended that you run the installation</li> </ul>	
	off the network. This note does not apply to users who run	
	OfficeMate/ExamWRITER through Terminal Server.	
1. Clos	e all applications on all computers and restart each computer.	
2. If yo ensu full l	u are installing OfficeMate/ExamWRITER in a networked environment, ure that you are logged into the network or terminal server as a user with ocal administrative access rights.	
3. Disa com	able all antivirus and screen saver programs that are running on your uputer(s).	
<ol> <li>Disable the User Account Control (UAC) feature on <i>all</i> computers to eliminate User Account Control error messages while using OfficeMate/ ExamWRITER.</li> </ol>		
a. (	Click Start.	
b. 3	Select Control Panel.	
с. (	Click User Accounts.	
d. (	Click the Change User Account Control settings link.	
e.	Move the slider down to <b>Never notify</b> .	
f. (	Click <b>OK</b> .	
g. (	Close the Control Panel.	
NOTE	Complete steps 5–12 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.

OMSuite OM12.0/ EW 12.0/ RV	VILO Welcome to the InstallShield Wizard for OfficeMate Suite 12.0 The InstallShield Wizard will install OfficeMate Suite 12.0 on your computer. To continue, click Next.
InstallShold	< Back Next > Cancel

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

OMSuite OM 12.0/ EW 12.0/ RW Installing the OfficeMate Sui	120
	WARNING! To prevent installation errors, ensure that you have: 1. Closed all applications on all computers and restarted each computer and server (if applicable). 2. Logged into the network as a user with full local administrative access rights (if in networked environment) For more information, see "Sharing Folders" and "Mapping Network. Drives" at http://www.officemate.net/support_om_resources.aspx. 3. Disabled all anti-virus and screen saver programs that are running on your computer(s).
InstallShield	< Back Next> Cancel

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



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

OMSuite OM 12.0/ EW 12.0/ RW Select Components	/12.0		<b>.</b>
	Select the OfficeMate Suite comp	onents to install.	
	<ul> <li>OfficeMate v12.0</li> <li>✓ ExamVRITER 12.0</li> <li>✓ ReportWRITER v12.0</li> </ul>	0K 0K 0K	Description Instal Diffeed tax v12.0, this will includ the programs only, proper license activation is required to run.
	Space Required on C: Space Available on C:	0 K 150763108 K	
InstallShield	< <u>B</u> ack	<u>N</u> ext >	Cancel

Upgrading to OfficeMate/ExamWRITER 12.0 Installing OfficeMate/ExamWRITER

11. Check the setup information and click Next.



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

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

OMSuite OM 12.0/ EW 12.0/ RW	12.0
	Setup Completed
	OfficeMate Setup has finished copying files to your computer.
	Your Computer will now be REBOOTED!
	Please click Finish to complete the Installation of OfficeMate on your computer!
Install Shield	< Back Finish Cancel

Your computer reboots.

 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.

- 14. 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** (OfficeMate Enterprise upgrading users & OfficeMate/ExamWRITER 9.0 and above upgrading users)
    - -**Drive:\OMATE32\DATA** (OfficeMate/ExamWRITER 8.0 and below upgrading users)
  - b. On each workstation, assign the local or domain users List & Execute, Read, and Write (NTFS) permissions to the following directories:
    - -**Drive:\OfficeMate** (OfficeMate Enterprise upgrading users & OfficeMate/ExamWRITER 9.0 and above upgrading users)
    - -**Drive:\OMATE32** (OfficeMate/ExamWRITER 8.0 and below upgrading users)
    - -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** (OfficeMate Enterprise upgrading users & OfficeMate/ExamWRITER 9.0 and above upgrading users)
    - -**Drive:\OMATE32\DATA** (OfficeMate/ExamWRITER 8.0 and below upgrading users)

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).

	OfficeMate Service Pack Installer
Setup Type	
	Workstation     Workstation     The Different at a Company of the Different at a Company RITER on the angle of the Different at a Company of the Differ
	be used on this computer and will access the OfficeMate data residing on another computer through the network.]
	<ul> <li>Server         Server         [Server/Server and Workstation: Select this option if the other computers will access the OfficeMate data on this computer and the OfficeMate/ExamWRITER software may also be used on this computer.]     </li> </ul>
	Next> Cancel

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



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



- 11. On a workstation, navigate to your **OfficeMate Updates** folder on your network. If your download folder has a different name, navigate to that folder.
- 12. Double-click 12.0.3\_SP12\_Installer.exe.

The installer opens and begins running.

13. 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.



14. Click Next.

#### Upgrading to OfficeMate/ExamWRITER 12.0 Opening OfficeMate

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





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

OfficeMate Service Pack Installer		
	Service Pack Install Completed	
	OfficeMate Service Pack Installer has finished updating your computer.	
	Please click Finish to complete the service pack update of OfficeMate on your computer!	
InstallShield	Cancel	

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

## Opening OfficeMate

- 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.