Upgrading to OfficeMate/ExamWRITER 12.0

OfficeMate®
ExamWRITER®

In this document:

NOTES	
	• If you are already using OfficeMate/ExamWRITER 12.0.2, then you *only* 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.
	• To find out what's new in OfficeMate/ExamWRITER 12.0, review the "What's New" documentation in the Eyefinity Support Community.
	• Before you install and activate OfficeMate/ExamWRITER, review the Hardware & System Specifications located at www.eyefinity.com/practice-management/officemate/sys-req.html.
	• 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.
	• 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 running the OfficeMate/ExamWRITER programs.

2. Log into Eyefinity.com.

3. Click the **Click here to upgrade OfficeMate/ExamWRITER!** banner.

4. Click **Next**.

   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

NOTE	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.

1. 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**.

6. If you activated security, type your user ID and password in the Welcome to OfficeMate window and click **OK**.

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

> **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.
> - If you are currently using Microsoft SQL Server Standard rather than Express, contact Eyefinity Customer Care at 800.942.5353 prior to proceeding.

1. Close all applications on all computers and restart the server.

2. 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.
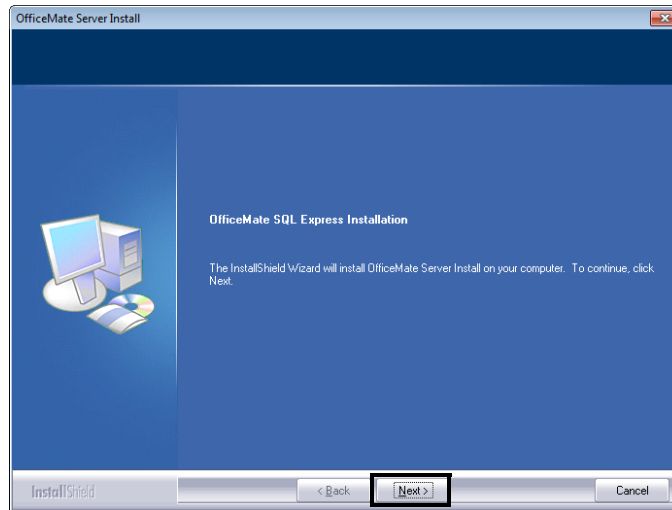
9. Select the option that best describes how you will use OfficeMate/ExamWRITER on this computer.

   – *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.
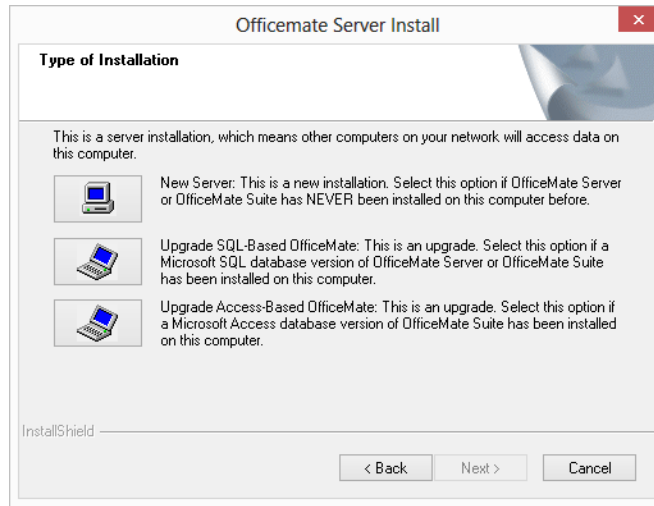
10. If you are prompted to select your SQL database, perform the following steps:

a. Select the OfficeMate SQL instance from the Available SQL Instances column.

| NOTE	To determine your OfficeMate SQL instance, open OfficeMate on a workstation, click **Help**, and select **About OfficeMate**. The SQL instance is the second part of the server path (for example, if the server path is 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**.
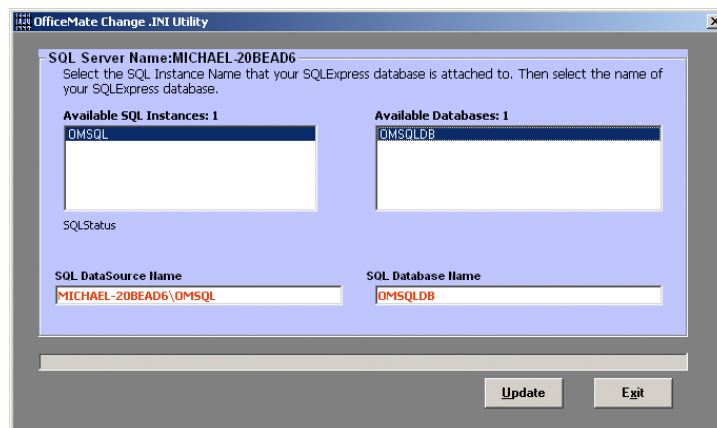
11. If you are prompted, choose the location of your current OfficeMate/ExamWRITER data and click **Next**.
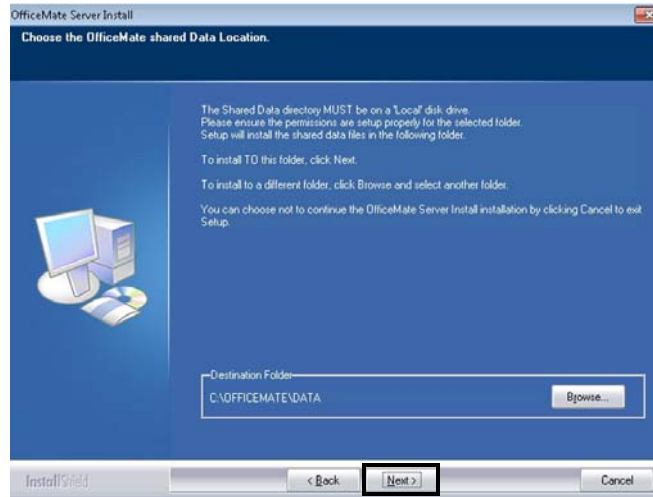
NOTE	The default location is **C:\OfficeMate\DATA**, but your data may reside in another location. Click **Browse**, navigate to the folder on the server, and click **OK**. The location you choose must be shared with full access so other computers on the network can access the OfficeMate/ExamWRITER data.
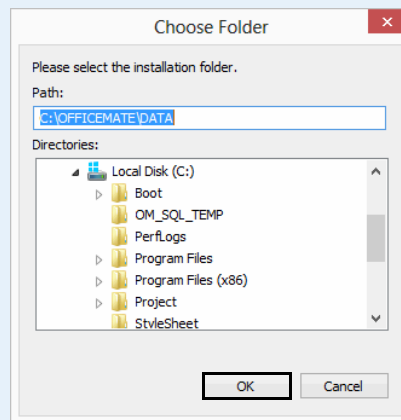
12. Review the OfficeMate/ExamWRITER SQL setup information and click **Next**.
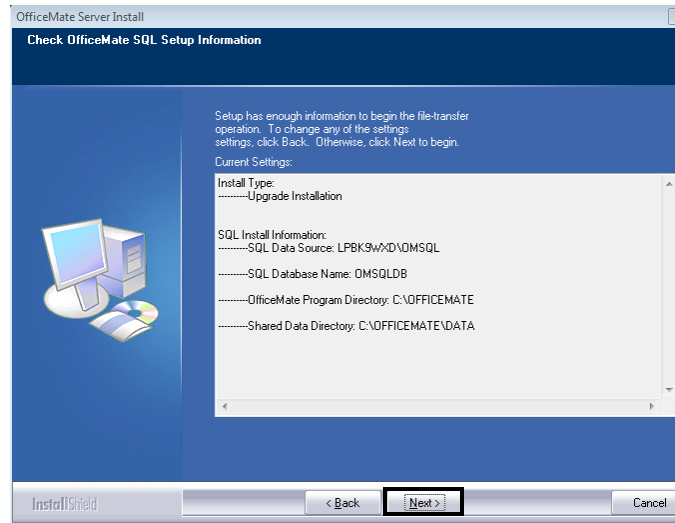
The OfficeMate SQL Install wizard configures and installs Microsoft SQL Server 2008 Express and, if necessary, converts your data from Access to SQL. This may take several minutes or a few hours.

13. If 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.
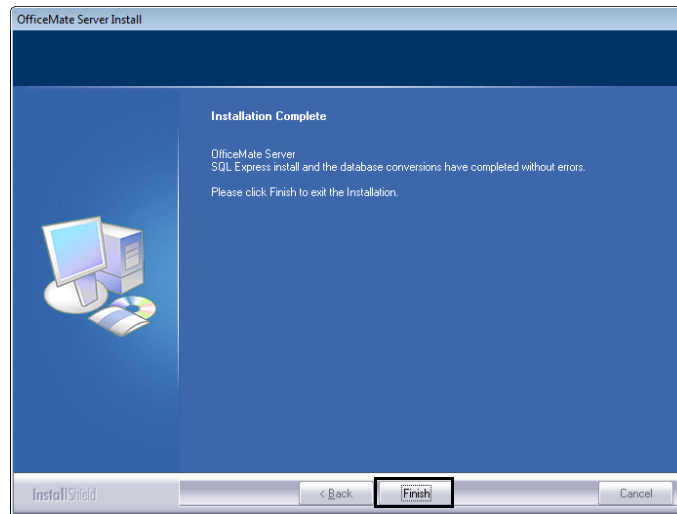
14. If a window opens and asks you to specify the location of the OMServer.exe to continue, click **OK**.
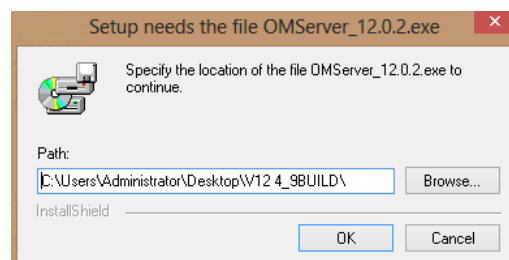
15. Ensure that you have backed up your database and click **Yes** to continue.
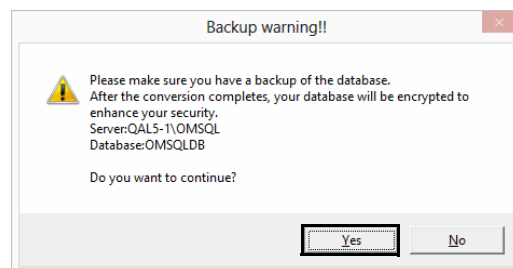
16. When the installation is complete, click **Finish**.

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 Offi- ceMate/ 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 4.
	• 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.

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.
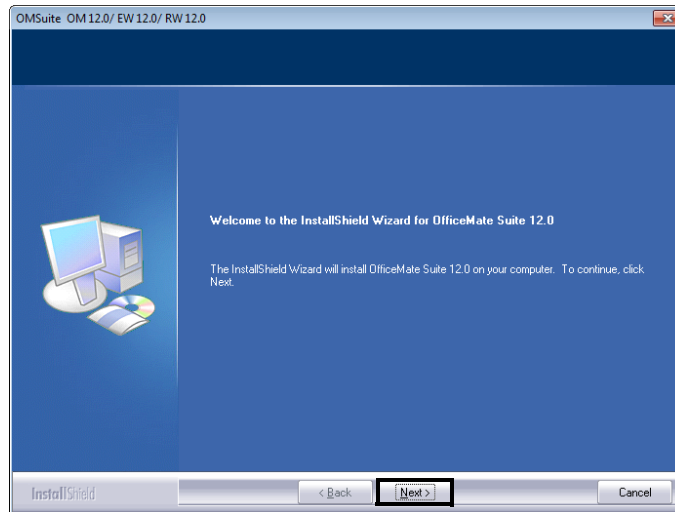
| NOTE	Complete steps 5–12 on each computer from which you plan to run OfficeMate/ExamWRITER.

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.
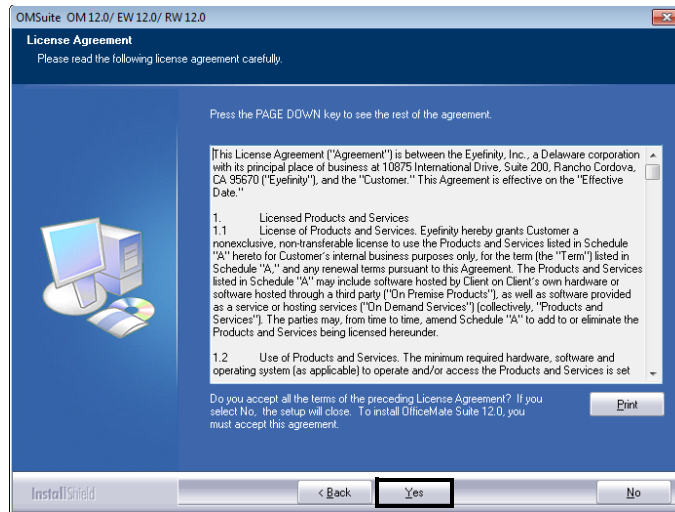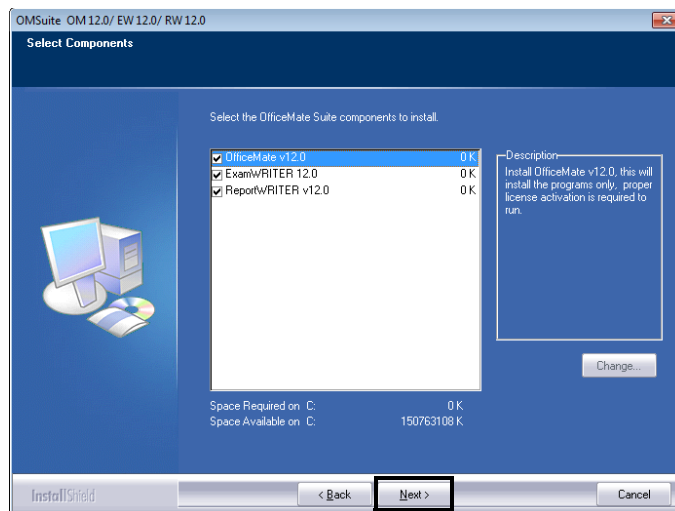
7. Click **Next**.

8. Read the warning message to prevent installation errors and click **Next**.
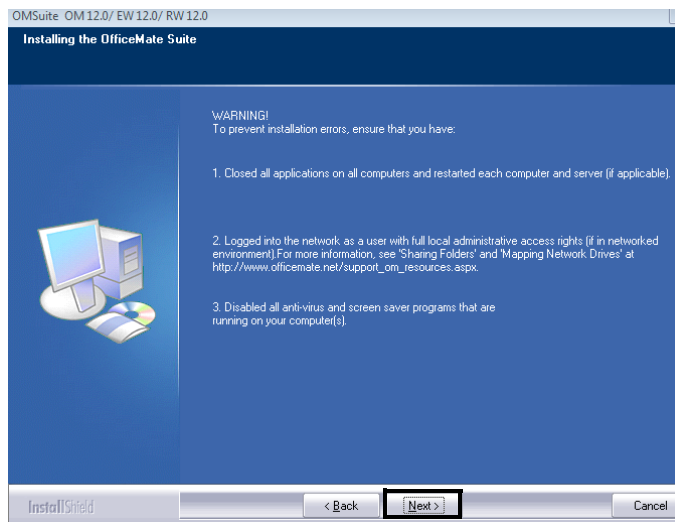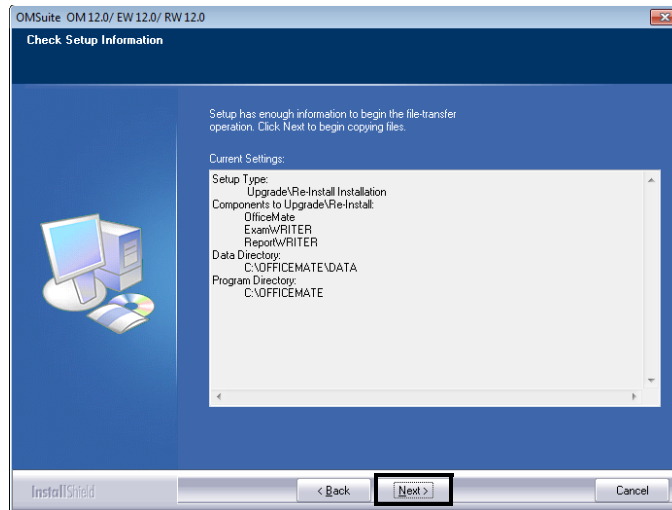
9. Click **Yes** to accept the License Agreement.

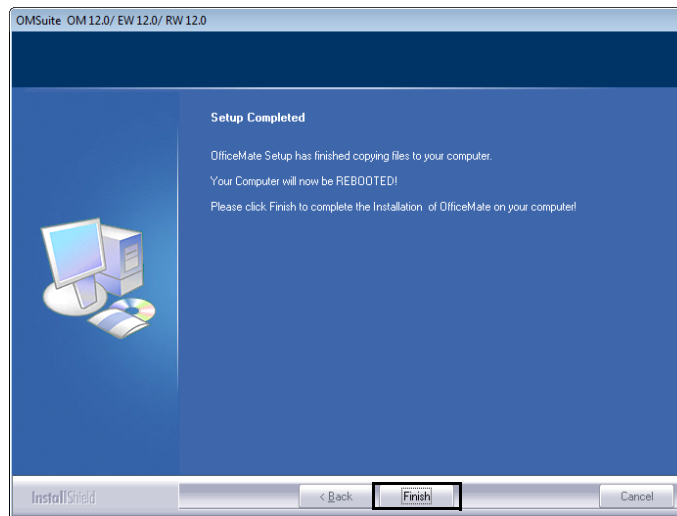10. Select all of the OfficeMate Suite components and click **Next**.

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

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**.

Your computer reboots.

13. 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**.

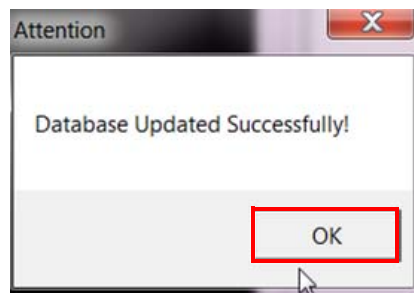   The installer opens and begins running.

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).
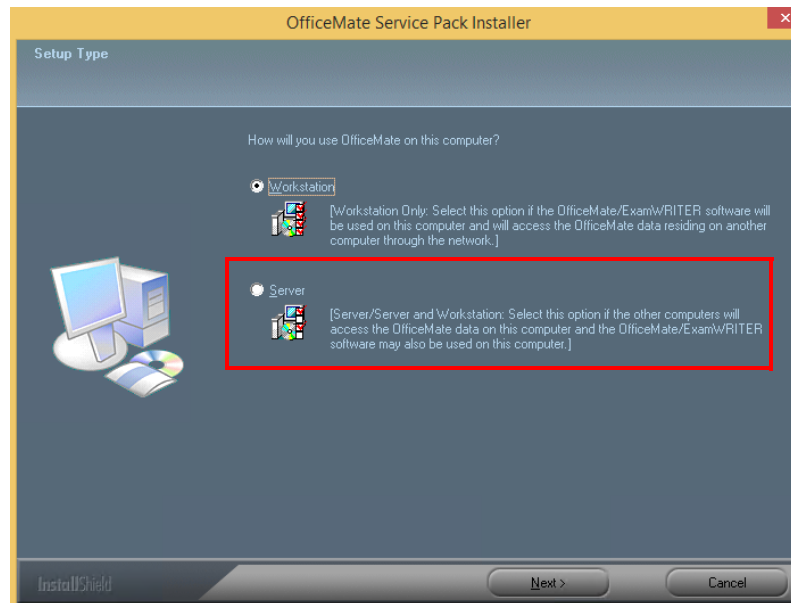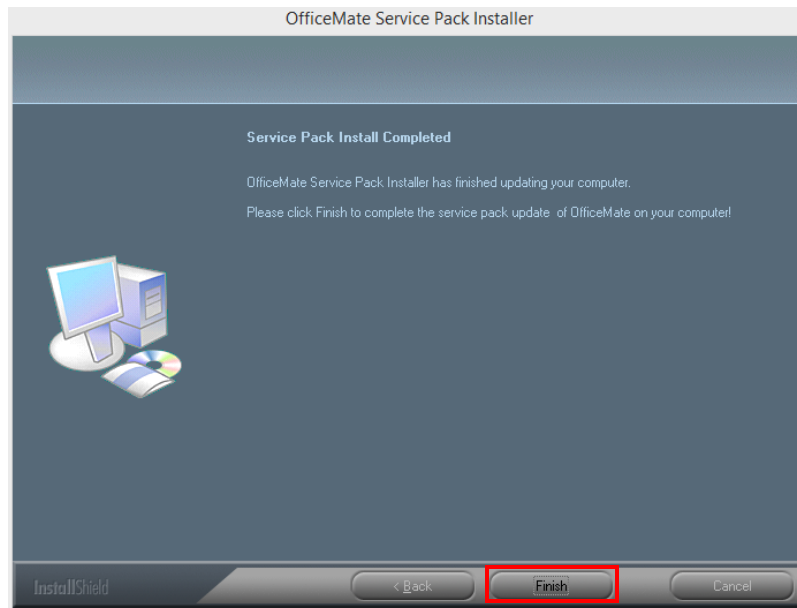

8. Click **Next**.

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

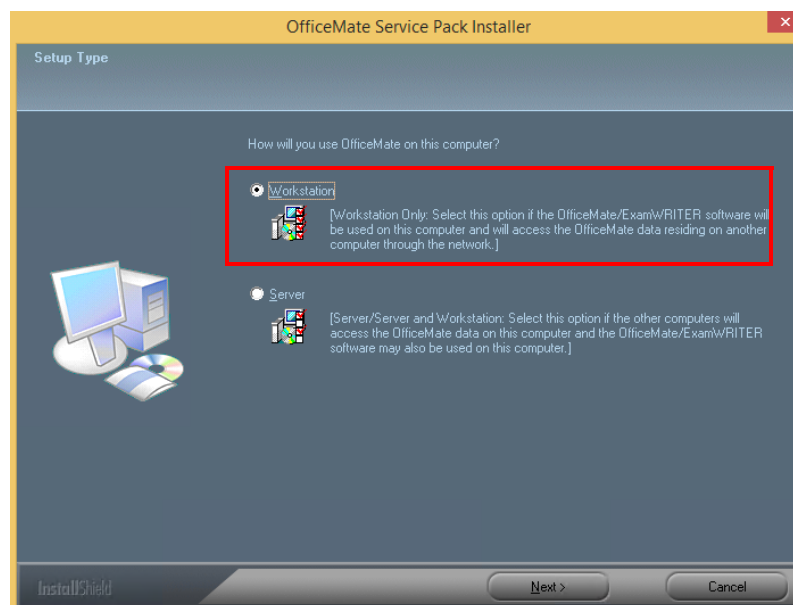| NOTE	If your database update is unsuccessful, contact Customer Care at 800.942.5353.

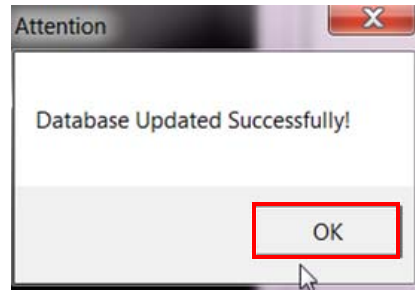10. Click **Finish** when the installation is complete.

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.
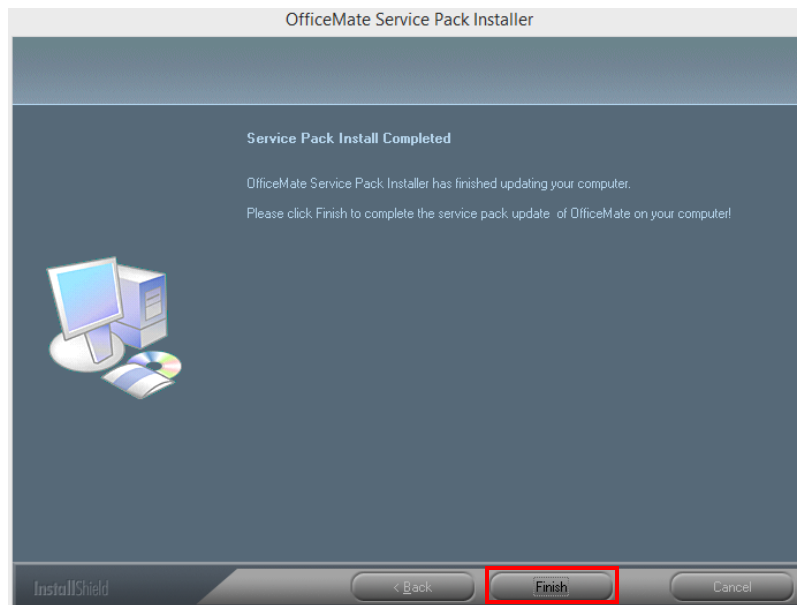

14. Click **Next**.

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.

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.