Server Migration Guide
Introduction

As the computer industry continues to evolve and new technologies emerge onto the market, clients may choose to upgrade their existing IT infrastructure with new servers. This document is intended for those clients who have purchased new servers and are interested in the migration of their existing MDsuite Application Server to a new server. This document covers MDsuite system requirements, planning guides, setup procedures, and checklists to facilitate the rapid deployment of new servers.

Who Should Read This

This document covers many technical aspects involved in the setup and implementation of a new server, installation of the MDsuite software, and the migration of any existing MDsuite databases. Because of the technical complexities involved in deploying a new MDsuite server, this guide is intended to be used by an IT professional or someone with sufficient technical expertise to perform all required procedures.

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Contact Information

Professional Data Services, Inc. Technical Support is available between the hours of 6:00am and 5:00pm Pacific Standard Time.

Technical Support

- Phone: 800-875-0480
- Fax: 858-486-5493
- Email: support@mdsuite.com

MDsuite System Requirements

System requirements are subject to change. For the latest system requirement information, please visit the MDsuite website at http://www.mdsuite.com/resources/system_requirements.
Deployment Guide

This section will cover some of the most common scenarios in server migration and will guide you through server prerequisites, server preparation, MDsuite application installation, and migration of the client databases to the new server. It is extremely important to perform a full backup of the existing server, including all client databases and information, before any deployment and migration procedures are initiated.

Server Prerequisites

The new server should already have a supported operating system installed. Information on supported operating systems can be found at http://www.mdsuite.com/resources/system_requirements. The most ideal scenario for new server deployment is to ensure that:

a. The new server is at the same physical location as the existing server OR
b. The new server is able to communicate via a network or direct connection with the existing server OR
c. The client databases and related files have been provided to you on CD, DVD, flash drive, or other removable/portable media.

Once prerequisites have been met, follow the below steps to prepare the server for installation of the MDsuite Application Server software.

Step 1: Installing Internet Information Services (IIS)

The MDsuite software depends on Internet Information Services to function correctly. Installation of IIS is the first step in preparing your new server. Follow the below steps to deploy IIS onto your server, using the procedures that correspond to the version of the Windows operating system you are running.

Windows Server 2012

1. Click on Start button and choose Server Manager and single click to launch.
2. The Server Manager dialog appears. From the list on the left, highlight Dashboard.
3. In the right pane, under Quick Start click Add roles and features.
4. The Add Roles and Features Wizard dialog appears. Click Next under Before You Begin. Under Installation Type, select Role-based or feature-based installation and click Next. Under Server Selection, select the current server and click Next.
5. Under Server Roles, choose the following from the list of available roles and then click Next:
   - Web Server (IIS)
     - Common HTTP Features
       - Default Document
       - Directory Browsing
       - HTTP Errors
       - Static Content
       - WebDAV Publishing
     - Health and Diagnostics
       - HTTP Logging
       - Logging Tools
       - ODBC Logging
       - Request Monitor
       - Tracing
- **Performance**
  - Static Content Compression
  - Dynamic Content Compression
- **Security**
  - Request Filtering
  - URL Authorization
  - Windows Authentication
- **Application Development**
  - .NET Extensibility 3.5
  - ASP
  - ASP.NET 3.5
  - ISAPI Extensions
  - ISAPI Filters
  - Server Side Includes
- **Management Tools**
  - IIS Management Console
  - IIS 6 Management Compatibility
    - IIS 6 Metabase Compatibility
    - IIS 6 Management Console

6. Under **Features**, choose the following from the list of available roles and then click **Next**:  
   - .NET Framework 3.5 Features
     - .NET Framework 3.5
   - SMTP Server

7. Click **Install** to continue with the installation of the server roles and features. Click **Close** once the installation completes.

**Windows Server 2008**

1. Click on the **Start** button and choose **Control Panel**. When the Control Panel appears, choose **Administrative Tools**.
2. In the Administrative Tools section, locate **Server Manager** and double click to launch.
3. The **Server Manager** dialog appears. From the list on the left, highlight **Roles**.
4. In the right pane, under **Roles Summary** click **Add Roles**.
5. The **Add Roles Wizard** dialog appears. In the list of available roles, check the box next to **Web Server (IIS)**. Click **Next**.
6. The **Select Server Roles** dialog appears. From the list of available roles, click the checkbox next to **Web Server (IIS)**. Click **Next**.
7. The **Web Server (IIS)** dialog appears with information about IIS 7.0. Click **Next**.
8. The **Select Role Services** dialog appears. From the list of available **Role services**, select the following services and then click **Next**:  
   - Static Content
   - WebDAV Publishing*
   - Default Content
   - Directory Browsing
   - HTTP Errors
   - ASP.NET
   - .NET Extensibility
   - ASP
   - ISAPI Extensions
   - ISAPI Filters
   - Server Side Includes
   - HTTP Logging
   - Logging Tools
- Request Monitor
- Tracing
- Windows Authentication
- URL Authorization
- Request Filtering
- Static Content Compression
- Dynamic Content Compression
- IIS Management Console
- IIS Management Scripts and Tools
- Management Service
- IIS 6 Management Compatibility

9. The Confirm Installation Selections dialog appears. Review your selections and verify that the selections shown match the list in Step 8. Click Install to proceed.

10. The wizard will install role and services as specified. You may be prompted to reboot the server at the end of the process. If so, reboot the server before continuing to the next step.

11. Click on the Start button and choose Control Panel. When the Control Panel appears, choose Administrative Tools.

12. In the Administrative Tools section, locate Server Manager and double click to launch.

13. The Server Manager dialog appears. From the list on the left, click on Features and then click the Add Features button in the right pane.

14. The Add Features Wizard appears. From the list of available features, locate SMTP Server, .NET Framework 3.5.1 Features and check the boxes for each one.

15. A dialog may appear asking to install additional required features. Click Add Required Features if it does and click Next.

16. Click Install to continue with the installation of the SMTP Server Service. Click Close once the installation completes.

* Please note, if you are using the non R2 version of Windows 2008 Server, you will need to install and enable the WebDAV extensions for Internet Information Services (IIS). Refer to: http://learn.iis.net/page.aspx/350/installing-and-configuring-webdav-on-iis-7/ for information on how to do this.

** Windows 2003 Server **

1. Click on Start, select Control Panel, and choose Add or Remove Programs.

2. Double-click on Add/Remove Windows Components.

3. The Windows Components Wizard dialog appears. Highlight the Application Server entry and click Details.

4. The Application Server dialog appears. Highlight Internet Information Services (IIS) and click Details.

5. Select only Common Files, Internet Information Services Manager, SMTP Service, and World Wide Web Service. Do not check any other boxes.

6. Click OK to close the Internet Information Services (IIS) dialog.

7. Click OK to close the Application Server dialog.

8. Click Next to proceed with installation. Insert your Windows 2003 Server installation media if prompted.

9. When the install is complete, click Finish.

** Windows 7:**

1. Click on Start and then select Control Panel.

2. When the Control Panel appears, double click on Programs and Features.

3. The Programs and Features window appears. From the Tasks list on the left, click on Turn Windows features on or off.
4. The **Windows Features** dialog appears with a list of available features. Locate the **Internet Information Services** entry and click the + sign to expand the tree.
5. Check the box next to **Web Management Tools**.
6. Click the + next to **Web Management Tools** to expand the feature tree.
7. Check the box next to **IIS 6 Management Compatibility**.
8. Click the + next to **IIS 6 Management Compatibility** and check the following items:
   - **IIS 6 Management Console**
   - **IIS Metabase and IIS 6 configuration compatibility**
9. Click the + next to **World Wide Web Services** to expand the feature tree.
10. Click the + sign next to **Application Development Features** and check off the following items:
    - **.NET Extensibility**
    - **ASP**
    - **ASP.NET**
    - **ISAPI Extensions**
    - **ISAPI Filters**
    - **Server-Side Includes**.
11. Click the + sign next to **Common HTTP Features** and check off the following items:
    - **Default Document**
    - **Directory Browsing**
    - **HTTP Errors**
    - **Static Content**
    - **WebDAV Publishing**
12. Click the + sign next to **Health and Diagnostics** and check off the following items:
    - **HTTP Logging**
    - **Logging Tools**
    - **Request Monitor**
    - **Tracing**
13. Check the box next to **Performance Features**.
14. Click the + sign next to **Security** and check off the following items:
    - **Request Filtering**
    - **URL Authorization**
    - **Windows Authentication**

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**Step 2: Installing Microsoft SQL Server**

Microsoft SQL Server must be installed prior to installing MDsuite. While most clients deploy Microsoft SQL Server onto the same computer that they will install MDsuite, a separate database server with Microsoft SQL Server installed is also supported. Keep in mind that the procedures for installing your version of SQL Server may differ slightly than the steps outlined below.

**Installing SQL Server 2012**

1. From the installation media location containing SQL Server 2012, run **setup.exe**. You may be prompted to install an update for Microsoft .NET Framework and the Windows Installer. Choose OK to install these necessary updates. You may be required to reboot the computer once installation of the prerequisite software is completed.
2. If you had to reboot the computer, restart the **setup.exe** program. The setup program will display the **SQL Server Installation Center** dialog.
3. From the list on the left, choose **Installation**. From the list of installation types on the right, choose **New SQL Server stand-alone installation or add features to an existing installation**.
4. The SQL Server 2012 setup will present a **Setup Support Rules** dialog that will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click **OK** to continue.

5. The **SQL Server 2012 Setup** dialog appears and will prompt you to either provide a product key or specify an evaluation version. Select **Enter the product key:** and provide your SQL Server 2012 product key. Click **Next** to continue.

6. The **License Terms** dialog appears. If you accept the terms of Microsoft’s license, check the box next to **I accept the license terms.** Click **Next** to continue.

7. The **Setup Support Files** dialog appears. Click **Install** to initialize installation of the SQL Server 2012 Setup Support Files. The **Product Updates** dialog box may appear if there are updated installation files available. Select “Include SQL Server product updates” and select **Next.** The updated installation files will begin downloading if an update is available. If no update is found online, click next to proceed.

8. The **Setup Support Rules** dialog appears and will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click **Next** to continue.

9. The **Setup Role** dialog will appear. “SQL Server Feature Installation” should be selected. Click **Next.**

10. The **Feature Selection** dialog will appear. Check the box next to the following items and click **Next:**

    - Database Engine Services
    - SQL Server Replication
    - Full-Text and Semantic Extractions for Search
    - Client Tools Connectivity
    - Client Tools Backwards Compatibility
    - Management Tools – Basic
    - Management Tools – Complete

11. The **Instance Configuration** dialog appears. You can specify SQL Server 2012 to be installed as the **Default instance** or specify a **Named instance.** You can also change the installed directory for SQL Server by specifying the desired path in the **Instance root directory** field. Click **Next** to continue.

12. The **Disk Space Requirements** dialog appears. Click **Next** to continue.

13. The **Server Configuration** dialog appears. You must specify an account for the services to run under. Provide the account name and password for **SQL Server Agent** and **SQL Server Database Engine.** Set the **SQL Server Browser** startup type to **Automatic.** Click **Next** to continue.

14. The **Database Engine Configuration** dialog appears. Select **Mixed Mode (SQL Server authentication and Windows Authentication)** and specify a password for the SQL Server “sa” account. Click the **Add button** and specify a local or domain account to add as an additional administrator. Click **Next** to continue.

15. The **Error and Usage Reporting** dialog will appear. If you want to send information to Microsoft about SQL Server 2012 errors and usage, check the boxes. Otherwise, just click **Next** to continue.

16. The **Installation Rules** dialog appears that will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click **Next** to continue.

17. The **Ready to Install** dialog appears with a list of features you selected for installation. Review your selections. If you need to make any changes, click **Back,** otherwise click **Install** to begin installation.

18. The **Installation Progress** dialog will appear and show you the progress of the installation processed. Once finished, click **Next** to continue.

19. The **Complete** dialog will appear. Click **Close** to end the installation. SQL Server 2012 is now installed.
21. Once you complete the installation of SQL Server 2012, you must download and install the [SQL Server 2005 Backward Compatibility Components](ftp://dsiclient@ftp.mdsuite.com) from the MDsuite ftp site: [ftp://dsiclient@ftp.mdsuite.com](ftp://dsiclient@ftp.mdsuite.com). When prompted for a password, enter: install (all lowercase).

Download and install: SQLSERVER2005_BC.MSI

### Installing SQL Server 2008

1. These instructions are the same for both SQL Server 2008, and SQL Server 2008 R2.
2. From the installation media location containing SQL Server 2008, run `setup.exe`. You may be prompted to install an update for Microsoft .NET Framework and the Windows Installer. Choose OK to install these necessary updates. You may be required to reboot the computer once installation of the prerequisite software is completed.
3. If you had to reboot the computer, restart the `setup.exe` program. The setup program will display the SQL Server Installation Center dialog.
4. From the list on the left, choose Install. From the list of installation types on the right, choose **New SQL Server stand-alone installation or add features to an existing installation**.
5. The SQL Server 2008 setup will present a Setup Support Rules dialog that will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click OK to continue.
6. The [SQL Server 2008 Setup](http://example.com) dialog appears and will prompt you to either provide a product key or specify an evaluation version. Select **Enter the product key** and provide your SQL Server 2008 product key. Click Next to continue.
7. The License Terms dialog appears. If you accept the terms of Microsoft’s license, check the box next to **I accept the license terms**. Click Next to continue.
8. The Setup Support Files dialog appears. Click Install to initialize installation of the SQL Server 2008 Setup Support Files.
9. The Setup Support Rules dialog appears and will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click Next to continue.
10. The Feature Selection dialog will appear. Check the box next to the following items:
    - Database Engine Services
    - SQL Server Replication
    - Full-Text Search
    - Client Tools Connectivity
    - Client Tools Backwards Compatibility
    - Management Tools – Basic

11. The Instance Configuration dialog appears. You can specify SQL Server 2008 to be installed as the Default instance or specify a Named instance. You can also change the installed directory for SQL Server by specifying the desired path in the **Instance root directory** field. Click Next to continue.
12. The Disk Space Requirements dialog appears. Click Next to continue.
13. The Server Configuration dialog appears. You must specify an account for the services to run under. Provide the account name and password for SQL Server Agent and SQL Server Database Engine. You can also specify one account for all services by clicking on **Use the same account for all SQL Server services** and providing an account name and password. Set the SQL Server Browser startup type to Automatic. Click Next to continue.
14. The Database Engine Configuration dialog appears. Select **Mixed Mode (SQL Server authentication and Windows Authentication)** and specify a password for the SQL Server “sa” account. Click the Add button and specify a local or domain account to add as an additional administrator. Click Next to continue.
15. The **Error and Usage Reporting** dialog will appear. If you want to send information to Microsoft about SQL Server 2008 errors and usage, check the boxes. Otherwise, just click **Next** to continue.

16. The **Installation Rules** dialog appears that will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click **Next** to continue.

17. The **Ready to Install** dialog appears with a list of features you selected for installation. Review your selections. If you need to make any changes, click **Back**, otherwise click **Install** to begin installation.

18. The **Installation Progress** dialog will appear and show you the progress of the installation processed. Once finished, click **Next** to continue.

19. The **Complete** dialog will appear. Click **Close** to end the installation. SQL Server 2008 is now installed.

20. Install the latest Service pack for SQL Server:
   a. For SQL Server 2008: [http://support.microsoft.com/kb/968382](http://support.microsoft.com/kb/968382)
   b. For SQL Server 2008 R2: [http://support.microsoft.com/kb/2527041](http://support.microsoft.com/kb/2527041)

21. Once you complete the installation of SQL Server 2008, you must download and install the **SQL Server 2005 Backward Compatibility Components** from the MDsuite ftp site: [ftp://dsiclient@ftp.mdsuite.com](ftp://dsiclient@ftp.mdsuite.com). When prompted for a password, enter: install (all lowercase).

**Installing SQL Server 2005:**

1. Launch the SQL Server 2005 Setup from your installation media.
2. The **Microsoft SQL Server 2005 Setup** dialog appears. Check the box next to **I accept the licensing terms and conditions** and click **Next** to continue.
3. The **Installing Prerequisites** dialog may appear. Click **Install** to have the prerequisite software copied to the server and click **Next** to continue.
4. The welcome dialog will appear. Click **Next** to proceed.
5. The **System Configuration Check** will run and inform you of any problems with your system configuration that need to be addressed before installing.
6. The **Registration Information** dialog appears. Provide name and company information and, if required, the Product Key that came with your SQL Server installation. Click **Next** to continue.
7. The **Components to Install** dialog appears. Check off **SQL Server Database Services** and **Workstation Components, Books Online and Development Tools**. Leave all others unchecked and click **Next**.
8. The **Instance Name** dialog appears. Choose **Default Instance** and click **Next**.
9. The **Service Account** dialog appears. Change to **Use the built-in System Account** and check the boxes next to **SQL Server Agent** and **SQL Browser**. Click **Next** to continue.
10. In the **Authentication Mode** dialog, set to **Mixed Mode** and specify a password for the SA account. Confirm this password and click **Next** to proceed.
11. When the **Collation Settings** dialog appears, make no changes. Just click **Next** to continue.
12. When the **Error and Usage Report Settings** appears, leave both boxes unchecked and click **Next** to continue.
13. When the **Ready to Install** dialog appears, click **Install**. Click **Next** and then click **Finish** to complete the installation.
14. The installation should begin. When it finishes, click **Next** and then click **Finish**.

**Installing SQL Server 2012 Express:**

1. Launch the SQL Server 2012 Express installer. You may be prompted to install an update for Microsoft .NET Framework and the Windows Installer. Choose **OK** to install these necessary updates. You may be required to reboot the computer once installation of the prerequisite software is completed.
2. If you had to reboot the computer, restart the setup program. The setup program will display the SQL Server Installation Center dialog.

3. From the list on the left, choose Installation. From the list of installation types on the right, choose New SQL Server stand-alone installation or add features to an existing installation.

4. The SQL Server 2012 setup will present a Setup Support Rules dialog that will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click OK to continue.

5. The Product Key dialog will appear. However, the options should be greyed out with Specify a free edition selected by default. Click Next to continue.

6. The License Terms dialog appears. If you accept the terms of Microsoft’s license, check the box next to I accept the license terms. Click Next to continue.

7. The Setup Support Files dialog appears. Click Install to initialize installation of the SQL Server 2012 Setup Support Files. The Product Updates dialog box may appear if there are updated installation files available. Select “Include SQL Server product updates” and select Next. The updated installation files will begin downloading if an update is available. If no update is found online, click next to proceed.

8. The Setup Support Rules dialog appears and will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click Next to continue.

9. The Feature Selection dialog will appear. Check the box next to the following items:
   - Database Engine Services
   - SQL Server Replication
   - Management Tools – Basic

10. The Instance Configuration dialog appears. You can specify SQL Server 2012 to be installed as the Default instance or specify a Named instance. You can also change the installed directory for SQL Server by specifying the desired path in the Instance root directory field. Click Next to continue.

11. The Disk Space Requirements dialog appears. Click Next to continue.

12. The Server Configuration dialog appears. You must specify an account for the services to run under. Provide the account name and password for SQL Server Database Engine. Set the SQL Server Browser startup type to Automatic. Click Next to continue.

13. The Database Engine Configuration dialog appears. Select Mixed Mode (SQL Server authentication and Windows Authentication) and specify a password for the SQL Server “sa” account. Click the Add button and specify a local or domain account to add as an additional administrator. Click Next to continue.

14. The Error and Usage Reporting dialog will appear. If you want to send information to Microsoft about SQL Server 2012 errors and usage, check the boxes. Otherwise, just click Next to continue.

15. The Installation Rules dialog appears that will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click Next to continue.

16. The Ready to Install dialog appears with a list of features you selected for installation. Review your selections. If you need to make any changes, click Back, otherwise click Install to begin installation.

17. The Installation Progress dialog will appear and show you the progress of the installation processed. Once finished, click Next to continue.

18. The Complete dialog will appear. Click Close to end the installation. SQL Server 2012 Express is now installed.


20. Once you complete the installation of SQL Server 2012 Express, you must download and install the SQL Server 2005 Backward Compatibility Components from the MDsuite ftp site:
ftp://dsiclient@ftp.mdsuite.com. When prompted for a password, enter: install (all lowercase).
Download and install: SQLSERVER2005_BC.MSI

Installing SQL Server 2008 Express:

1. Launch the SQL Server 2008 Express installer. You may be prompted to install an update for Microsoft .NET Framework and the Windows Installer. Choose OK to install these necessary updates. You may be required to reboot the computer once installation of the prerequisite software is completed.
2. If you had to reboot the computer, restart the setup program. The setup program will display the SQL Server Installation Center dialog.
3. From the list on the left, choose Installation. From the list of installation types on the right, choose New SQL Server stand-alone installation or add features to an existing installation.
4. The SQL Server 2008 setup will present a Setup Support Rules dialog that will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click OK to continue.
5. The Product Key dialog will appear. However, the options should be greyed out with Specify a free edition selected by default. Click Next to continue.
6. The License Terms dialog appears. If you accept the terms of Microsoft’s license, check the box next to I accept the license terms. Click Next to continue.
7. The Setup Support Files dialog appears. Click Install to initialize installation of the SQL Server 2008 Setup Support Files.
8. The Setup Support Rules dialog appears and will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click Next to continue.
9. The Feature Selection dialog will appear. Check the box next to the following items:
   - Database Engine Services
   - SQL Server Replication
   - Management Tools – Basic
10. The Instance Configuration dialog appears. You can specify SQL Server 2008 to be installed as the Default instance or specify a Named instance. You can also change the installed directory for SQL Server by specifying the desired path in the Instance root directory field. Click Next to continue.
11. The Disk Space Requirements dialog appears. Click Next to continue.
12. The Server Configuration dialog appears. You must specify an account for the services to run under. Provide the account name and password for SQL Server Agent and SQL Server Database Engine. You can also specify one account for all services by clicking on Use the same account for all SQL Server services and providing an account name and password. Set the SQL Server Browser startup type to Automatic. Click Next to continue.
13. The Database Engine Configuration dialog appears. Select Mixed Mode (SQL Server authentication and Windows Authentication) and specify a password for the SQL Server “sa” account. Click the Add button and specify a local or domain account to add as an additional administrator. Click Next to continue.
14. The Error and Usage Reporting dialog will appear. If you want to send information to Microsoft about SQL Server 2008 errors and usage, check the boxes. Otherwise, just click Next to continue.
15. The Installation Rules dialog appears that will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click Next to continue.
16. The Ready to Install dialog appears with a list of features you selected for installation. Review your selections. If you need to make any changes, click Back, otherwise click Install to begin installation.
17. The **Installation Progress** dialog will appear and show you the progress of the installation processed. Once finished, click **Next** to continue.

18. The **Complete** dialog will appear. Click **Close** to end the installation. SQL Server 2008 Express is now installed.

19. Install the latest Service pack for SQL Server:
   a. For SQL Server 2008: [http://support.microsoft.com/kb/968382](http://support.microsoft.com/kb/968382)
   b. For SQL Server 2008 R2: [http://support.microsoft.com/kb/2527041](http://support.microsoft.com/kb/2527041)

20. Once you complete the installation of SQL Server 2008 Express, you must download and install the **SQL Server 2005 Backward Compatibility Components** from the MDSuite ftp site: [ftp://dsiclient@ftp.mdsuite.com](ftp://dsiclient@ftp.mdsuite.com). When prompted for a password, enter: install (all lowercase). Download and install: **SQLSERVER2005_BC.MSI**

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### Step 3: Transferring Logins, Roles and Passwords

Before the migration of data, we recommend you transfer your logins, roles and passwords manually. If you choose to only move your databases without running this script, your logins will be retained, however you will need to reset all of your user passwords prior to logging in for the first time on your new system. This process will keep you from having to do that.

1. Download the SQL Script: Login to the MDSuite FTP site: [ftp://dsiclient@ftp.mdsuite.com](ftp://dsiclient@ftp.mdsuite.com). When prompted for a password, enter: install (all lowercase). Download the file named “TLRPonly.sql”.
2. Run the SQL Script: When this file is on the server that you are migrating from, double-click it to open it in SQL Server Management Studio. Once it is open in SQL Server Management Studio, you will need to be logged into your MDSuite SQL Instance. Press execute and your output will appear below in the **Messages** section.
3. Transfer logins to the new server: Copy this output into a text document and name it MDSuiteLogins.txt. This text file needs to migrate to the new server with your databases.

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### Step 4: Data Migration

Before installation of the MDSuite Application Server software can take place, you should migrate the databases and DSF from the old server to the new server. This is required to preserve the software license information, custom printed formats, report and billing configuration profiles, operator usernames and passwords, and files in the EDI manager. While it is impossible to cover every possible scenario, some of the most common situations are covered in this guide. Refer to the below table:

<table>
<thead>
<tr>
<th>Condition</th>
<th>Follow steps in:</th>
</tr>
</thead>
<tbody>
<tr>
<td>The new server and the old server are both on the same network and can communicate with each other.</td>
<td>Section A: Migrating Over a Network.</td>
</tr>
<tr>
<td>The new server and the old server are in the same physical location and I have a flash drive, portable hard drive.</td>
<td>Section B: Migrating with Portable Media.</td>
</tr>
<tr>
<td>The database files have already been provided to me on CD or DVD. There are MDF (database) and LDF (log) files on my media.</td>
<td>Section C: Migrating with Optical Media.</td>
</tr>
<tr>
<td>The database files have already been provided to me on CD, DVD, or other form of removable media. There are DMP, TRN, or BAK files on my media.</td>
<td>Section D: Restoring and Attaching Databases in SQL Server</td>
</tr>
</tbody>
</table>

If a scenario listed here does not apply to your circumstance or you are unable to proceed with data migration, **do not continue**. Instead, stop here and contact MDSuite Technical Support for assistance.
Section A: Migrating Over a Network:

1. Decide where you want to deploy the database files on the new server and ensure you have full administrative rights on both the old server and the new server.
2. Create a shared folder with full write permissions on your new server. Ensure that you can access the shared folder from the existing server.
3. On the existing server, stop the Microsoft SQL Server service using the Services Snap-in or with the SQL Server Agent.
4. Launch Windows Explorer and navigate to the directory where the databases are stored. (Default is usually C:\Program Files\Microsoft SQL Server\MSSQL\Data).
5. Select all files that begin with DSI. There should be two files per database name, an MDF (database) and LDF (log). Examples are dsitemp, DSICX, DSI_MedicalDemo etc. Press CTRL + C to copy them to the clipboard.
6. Access the shared folder you created in Step 2.
7. Once you have the shared resource open on the new server, press CTRL + V to deposit the files to the desired location.
8. Move on to Section D and follow the steps applicable to your version of SQL Server. For security purposes, it is recommended that once you copy your databases to the new server, you remove sharing on the folder you created in Step 2.

Section B: Migrating with Portable Media:

1. On the existing server, login with full administrator credentials and ensure your removable device is attached and accessible on the server.
2. Stop the SQL Server Engine using the Services snap-in or the SQL Server Agent.
3. Launch Windows Explorer and navigate to the directory where the databases are stored. (Default is usually C:\Program Files\Microsoft SQL Server\MSSQL\Data).
4. Select all files that begin with DSI. There should be two files per database name, an MDF (database) and LDF (log). Examples are dsitemp, DSICX, DSI_MedicalDemo etc. Press CTRL + C to copy them to the clipboard.
5. Open your portable device in Windows Explorer and press CTRL + V to copy the databases to the portable media.
6. When the copy is finished, detach your portable device from the old server and connect it to the new server.
7. Login to the new server with administrator credentials and launch Windows Explorer. Open your portable device and select all of the database files you copied from the old server. Press CTRL + C to copy them to the clipboard.
8. Navigate to the desired location that you want to store the database files in and press CTRL + V to copy the files. Once the copy is complete, follow the below steps to attach the databases to SQL Server.
9. Move on to Section D and follow the steps applicable to your version of SQL Server.

Section C: Migrating with Optical Media:

1. Login to the new server with administrator credentials and launch Windows Explorer.
2. Insert your CD or DVD into the new server.
3. Open the CD or DVD containing the databases and highlight all the database files. Press CTRL + C to copy them to the clipboard.
4. Navigate to the desired location that you want to store the database files in and press CTRL + V to copy the files.
5. Move on to Section D and follow the steps applicable to your version of SQL Server.
Section D: Restoring and Attaching Databases in SQL Server:

This section will guide you through attaching MDF (database) and LDF (log) files to an existing SQL Server instance. Refer to the steps that apply to the version of SQL Server you have installed on the new server.

Attaching Databases with SQL Server:

1. Launch the SQL Server Management Studio application.
2. Change Authentication to Mixed Mode and use the SA account to connect.
3. The main interface loads. From the tree on the left, right click on Databases and choose Attach.
4. The Attach Databases interface loads. Click the Add button.
5. The Locate Database Files loads. Navigate to the location you copied the database files to and highlight the MDF file of the database you want to attach. Click OK.
6. Click OK on the Attach Databases dialog to attach the database to SQL Server.
7. Repeat the above steps for each database file you copied over.

Restoring Databases with SQL Server 2005 and 2005 Express:

1. Launch the SQL Server Management Studio application.
2. From the tree on the left, right click on Databases and choose Restore Database.
3. The Restore Database dialog appears. Change the Source for restore to From Device and click on the ... button.
4. The Specify Backup dialog appears. Click on the Add button.
5. The Locate Backup File dialog appears. Navigate to the location that contains the .DMP, .TRN, or .BAK file you want to restore. Highlight the file and click OK. Note: If you cannot see your backup file, try changing Files of Type to All Files (*).
6. Click OK again to close the Locate Backup File dialog.
7. Check the box under Restore from the list on the bottom and enter the database name in the To Database field. The name you enter should match the name under the Database heading in the list under Select the backup sets to restore.
8. Click on the Options entry from the list on the left and ensure the path entry in Restore As corresponds to the correct location that you want to place the database files. If this entry is incorrect or if you are restoring the files from a location other than the original path from the old server and do not change this entry to reflect the new location path, the restore will not work. Clicking on the entry will allow you to edit it.
9. Click OK to begin the restore process. Repeat the process to restore any other desired .DMP, .TRN, or .BAK backup files.

Section E: Import Logins, Roles and Passwords:

Back in step 3 we ran a SQL Script to export the Logins, Roles and Passwords for MDsuite. Now that you have transferred the databases over to your new server and attached them it is time to import these Logins.

1. Locate the txt file you created in step 3. This was named “MDsuiteLogins.txt”. Open this file and copy the contents onto your clip board.
2. Open SQL Server Management Studio and login to your MDsuite SQL Instance.
3. In the toolbar at the top of the screen, click the button titled “New Query”. A blank query box will now open.
4. Paste the contents of “MDsuiteLogins.txt” into the blank query and select “Execute”. This should complete successfully.
Section F: Transfer DSF

1. Login to the old server and launch Windows Explorer.
2. Copy the contents of the DSF folder (Default: c:\dsi\dsf) to removable storage, optical media, or a network location to your new server.
3. Paste the contents of the DSF folder (Default: c:\dsi\dsf) to the new location on your new server.
4. Allow it to over-write any files it may be in conflict with.

Step 5: Product Installation

You are now ready to begin installation of the MDsuite Application Server Software. The original software installation package may have been provided with the original software purchase. However, MDsuite is a constantly evolving product and improvements, bug fixes, and feature enhancements are constantly being incorporated into the software. Therefore, it is important that the latest version be acquired from Professional Data Services, Inc. before continuing with the software installation. The latest version of the software can be acquired from the Professional Data Services, Inc. FTP site at ftp://ftp.mdsuite.com. When prompted for a username, enter: dsiclient (all lowercase). When prompted to enter a password, enter: install (all lowercase). Once logged in here, you will see a 32, and 64 bit folder. Select the folder that pertains to your system and download the contained MDsuite Application Server installation package. You can also obtain it by contacting a Technical Support Representative.

Once you have acquired the installation package, follow the below steps to install the software. Keep in mind that if the client has multiple application servers, the application server software must be installed on each one.

To install the MDsuite Application Server Software, perform the following steps:

1. Launch the MDsuite Application Server installation package.
2. A welcome screen appears. Click Next to begin installation.
3. The License Agreement dialog will appear. If you agree to the terms of the license agreement, ensure I accept the license agreement is selected and click Next. (Note: If you do not agree to the terms of the license agreement, then you will not be able to install the software.)
4. The Installation Prerequisites dialog appears with information on requirements for the Microsoft .NET Framework. If the Download button is grayed out, click Next. Otherwise, click the Download button to download and install the required Microsoft .NET Framework package. The installer will exit here and you will have to restart it once installation of the Microsoft .NET Framework software is completed.
5. The Destination Folder dialog appears, allowing you to specify an alternative location to install the product. MDsuite should be installed on the volume with the most available free space on fixed, non-removable storage of the application server. If the default location is acceptable, click Next. Otherwise, click Browse and specify an alternative location and then click Next.
6. The Ready to Install the Application dialog appears. Click Install to begin initial installation of the software.
7. A Run Mod? dialog will appear, asking if you want to modify the databases to the version of MDsuite you're installing. Choose Yes. (Note: Sometimes the dialog appears behind the main installer interface. If it doesn't appear at first, minimize the main installer.) Please note, if you have multiple MDsuite Application Servers the MOD process only needs to be ran once. You can say NO to MOD on the secondary Application and Transmission servers.
8. The Define Database Server dialog appears. Specify the network name of the server on your network that is running Microsoft SQL Server. If the SQL Server is the same machine you're installing the application on, then specify the local computer's network name. In the event you are using a named instance, specify the network name, a backslash, and the name of the instance and click OK.
9. The Login to SQL Server dialog appears. In the User Name field specify sa. In the Password field, provide the password for the SQL Server SA account. Click OK.
10. A dialog will appear asking you if you bill to a set of particular destinations, click No.

11. The **Use MDs Reference?** dialog will appear. If your application server will have internet access available, it is recommended that you choose Yes to use the online help system. Otherwise, if your server will not have access, click No.

12. A dialog will appear stating the installation has completed successfully. Click Finish to close the installer.

If you received any errors during installation or were unable to complete the installation as specified above, contact our Technical Support department at 800-514-3131. Support is available between 6am and 5pm Pacific Standard Time.

Once product installation is completed successfully, you are ready to have users log into the server. Continue on top **Step 5: Installing or Updating Workstations**.

**Step 6: Installing or Updating Workstations**

Installation of the workstation component of MDsuite only needs to take place if the new MDsuite Application Server version is different than the server that is being replaced, or if workstations do not have clients installed on them at all. There are two options for installing the workstation component on client computers. If the workstation component is already installed, an in-place update can be performed. If not, the application server install provides the workstation component installer for deployment.

**Updating existing MDsuite Workstations:**

1. Launch the MDsuite workstation software.
2. Provide any operator login credentials or the SQL Server SA account credentials. Ensure the **Application Server** field contains the network name or IP address of the new server. Click Connect.
3. A dialog box should appear saying that a newer version of the workstation component is available. Click OK.
4. The workstation component is downloaded and the installer starts. You will be prompted to provide an installation path for the workstation. Ensure that this path points to the existing workstation installation location and click Next.
5. You will be prompted to overwrite existing files. Choose Yes for all files. Once the install is complete, the workstation component will re-launch. The **Version** entry should match the version of MDsuite you installed on the application server. If so, the update was successful and you can now log in and use the software.

**Installing new MDsuite Workstations:**

1. On a workstation computer, launch Internet Explorer.
2. When Internet Explorer loads, enter: `http://servername/elligence/clientdl/clientfull.exe` where **servername** is the network name or the IP address of the new MDsuite Application Server.
3. You will be prompted to run or save the file. Choose **Run**.
4. The MDsuite Workstation installer will launch. Press Next to begin installation.
5. You will be prompted to provide an installation path for the workstation. You can change the default location by clicking **Browse**. However it’s advised to leave the default location set. Click Next.
6. The installer will copy the required files. It may prompt you for permission to overwrite existing files. Choose **Yes to all** if it does.
7. The installer will create the program groups and icons and complete. Chose **Finish** to close the installer.
8. Launch the workstation software from the program group in the Start menu or from the desktop icon. Provide an operator and password. Ensure the Application Server field contains the name or IP address of the new application server and log in.

9. Repeat Steps 1 through 8 for all workstations that will be accessing MDsuite.

Post Deployment

Once the entire deployment process has been completed and the new infrastructure is online, you should review this section for further information on backup, remote access, and other areas of interest.

Remote Access

Clients upgrading their application server may be interested in remote access to their MDsuite software from home and abroad. There are many ways in which to accomplish this but the two most effective ways to setup remote access is to either:

2. Use a separate, dedicated Terminal Server for Remote Desktop services.

While we recommend either of these two methods, it is entirely up to the client to implement remote access, regardless of which medium is chosen. Whichever medium is chosen must provide sufficient security and encryption to satisfy HIPAA regulations.

Backing Up Data

Backing up mission critical data is important to the success of any practice or billing service. There are many different ways that data can be backed up, from tape and optical storage to online services. Some recommendations are:

4. An enterprise backup software package used in conjunction with external storage (removable hard drive, tape, etc…)
5. Backing up data to optical media such as blank CDs or DVDs.
6. Utilizing an online backup service for continuous backup protection.

While we recommend these options, it is entirely up to the client to implement any backup solution. Currently the most cost effective and recommended backup solution would be a combination of back up to disk and online backup. If that solution is cost prohibitive, we recommend that you use an enterprise level online backup solution such as Carbonite Pro or Mozy Pro. PDS cannot provide support for third party backup solutions, regardless of which method is used and is not responsible for any data loss. Refer to the third party software or service vendor for information and support and information.

Regardless of which solution you choose to back up data, you must ensure the following items are backed up:

- All MDsuite databases in SQL Server.
- The application installation directory (default: C:\Program Files\DSI\MDsuite Application Server)
- The Document Storage Folder (default (C:\DSI\DSF)