



Practice Management Installation Guide

Your computers must meet the Workstation, Server and Network Requirements (see below for specifics). These requirements will ensure that Practice Management will run in the manner it is designed.

Requirements/Prerequisites:

Workstation Requirements

- Windows XP SP2 or later or Windows XP Embedded SP2 Feature Pack 2007, Windows Vista, or Windows 7 32bit or 64 bit, Windows 8
- Microsoft .net 3.5 framework
- 128MB or greater video card
- 1024 X 768 minimum resolution
- Color Depth Set to "High Color (32 bit)" or higher
- MS Windows Standard Fonts
- English Language Set
- Internet access
- 3GB Ram Minimum, Recommend 4GB Ram or more
- 2.0ghz Dual Core or above Processor
- Antivirus programs should not scan the Office Tools program files
- AVG free Antivirus & Support Soft Assisted Service are not supported

Server Requirements

- Windows Server 2003 SP2, 2008 32bit or 64bit Standard, 2012, Enterprise Datacenter Editions SP2 or later or Windows Small Business Server 2003 or 2008 SP2 or later or Windows XP SP2 or later.
- 8 GB minimum, Recommend single SQL instance per server
- Terminal Services: RAM and Processor requirements increase by 1GB RAM + 1 CPU core (minimum) per each concurrent user.
- Antivirus programs should not scan SQL files and SQL Firewall ports.
- Microsoft SQL 2005 or SQL express (provided by Office Tools Professional install)

Recommended Printers

- HP Printers
- Dymo Printers for labels
- Xerox Printers

Network Requirements

- Ethernet infrastructure
- Server-Based Network or Windows Peer-to-Peer Network – Office Tools Client software and SQL must reside in the same network
- Internet Connection requires for all system updating & support. Port 3306 for license, Client Portal or DropFolder.net client file.

Integration Requirements

- QuickBooks Versions 2007-2012
- MS Office Versions 2003, 2007 & 2010
- MS Outlook 2007 & 2010
- Office Tools Professional USB Card reader for swiped Merchant Service

Now that you meet our system requirements you may now install the Practice Management Software.

WorkStation Install:

Once the installer is launched you will be walked through an installation wizard. Once you accept the License Agreement, you will be prompted with the Installation Options page.

By default only the Practice management workstation components are enabled. If installing the Demo, please include the Server components by clicking on the Red X and select the option "This feature will be installed on local hard drive."

Once feature selection is complete, click next to proceed with the install.

NOTE: If the installation asks you to reboot your computer, it may be due to configuration of the new components. Once rebooted, the installation will launch on its' own; unless the Practice Management suite is already installed and you will see the icon on your desktop.

Please install the server components below before logging into Practice Management.

This completes the Workstation install. Please see below for Server Configuration

SERVER INSTALLATION and CONFIGURATION

- Check for MSXML 6.0 SP2
(MSXML 6.0 with no service pack is fine) **NOTE:** Our installation will replace this with a version that will run with the version of Microsoft SQL that is going to be installed.
- Start> Control Panel> Add or Remove Programs
- If it is listed please remove it.

SERVER INSTALL

Launch Office_Tools.exe

- Once extracted it will install both MS Windows installer 4.5 & MS .NET framework 3.5 SP1. These programs will require a reboot for both.
- Select the **Server components**. (When it displays the options for "Practice Management 2011" and "Server Components" and "Database Back up Service" click on the "Practice Management" & **exclude** it.)
- To conclude the installation, click "finished" when prompted.
- The database components and databases are hard coded to the system drive (your default drive). If you would like to move the database to a different drive please contact Technical Support for additional information: 661.794.2220 or support@officetoolspro.com

The below configurations will need to be implemented. To register and license your Practice Management Software and use any Add-ons such as: Outlook, QuickBooks, Lacerte, Excel Imported, Client Portal Lite and Client Portal.

Open Port 3306:

TCP Port 3306 will need to be opened in both directions to license your software.

Note: If you encounter issues with connectivity or slowness you can open up these addition ports: 1433, 1434, 1033, and 1059.)

Dynamic Port:

Each installation of SQL chooses a specific dynamic port, see below for instruction on how to locate the port. This will allow for seamless connection between the designated SQL server and workstations. Exclude this on the server and workstation as well.

How to locate port:

The SQL dynamic port can be located in:

Start> Programs> Microsoft SQL Server 2005> Configuration Tools> SQL Server Configuration Manager

Expand the "SQL Server 2005 Network Configuration"

Select "Protocols for NORTH40SYSTEMS"

Double click TCP/IP. Under the "IP Addresses" tab scroll all the way to the bottom and add the TCP Dynamic Ports are displayed in there.

Log in/ User Name and Password/Updating:

- Select the server with “(Your server name here) \North40Systems” and select the “Office Tools Pro” database below your server name.

Log in Issues:

If you do not see “your server name”\north40systems in the dropdown for the server then please read above on “Open port 3306” and open the additional ports listed (Please do not manually type in your sever name.)

- Log in is: Admin, there is no password
- You may be prompted to update upon login, download and install the update prior to logging into Practice Management.
- You may encounter a database update upon initial login or after an update is applied.

Log in Issues:

- If you do not see “your server name”\north40systems in the dropdown for Server you do not have the server components installed. Please install the server components, when it is successfully installed you will have an option with your server name”\north40systems.