



Update Installation Instructions

Version 8.x to 8.2

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Appointments Installation Instructions

Be sure to quit all other Windows® programs before beginning the installation.



Review of the System Requirements

Appointments was designed to take advantage of the Windows® environment, and its minimum recommended system requirements are as follows:

Server

- An equivalent of a Pentium/Celeron/K6-2/Athlon/Duron 800Mhz or better
- Windows 98se, ME, NT4, 2000, XP PRO
-  **XP Home edition is not supported.**
- At least 256 MB of RAM
- At least 2 GB (gigabyte) of free hard drive space for a server or single user installation

Workstation

- An equivalent of a Pentium/Celeron/K6-2/Athlon/Duron 700Mhz or better
- Windows 98se, ME, 2000, XP PRO
-  **NT4 is not supported as a workstation OS.**
-  **XP Home edition is not supported.**
- At least 256 MB of RAM
- At least 500 MB of free hard drive space.

Updating Appointments

The process for updating your Appointments program involves six main parts:

- Backing up your existing data
- Removing the old version of Appointments
- Reinstalling the new version

- Updating your old data to be used with the new version
- Reinstalling reports and updating security as required by your version (discussed during each step)
- Removing Interbase

To help ensure the successful update of your program, please complete all of the steps outlined in the following instructions.

Note to Program Administrators



Anyone who is running Appointments Version 8.01.01 or 8.01b **should not** run the Update (Step 3). You should, however, complete the rest of the steps outlined in this guide. Refer to **Help > About** in your current version of Appointments if you are unsure of the version you have.

Part 1 Backup and Uninstall Old Version of Appointments

Before any other step in the update process is completed, a back up of your existing data should be created in a separate directory or on some removable media such as a CD or a zip disk. (Users of Interbase can simply copy their data directory, e.g., *c:\lappts\data*. Users of MS SQL Server should consult their DBA). Once a backup file has been created successfully, the older version of Appointments and the Interbase database engine should be uninstalled.



Note: When you uninstall your old version of Appointments, the data is *not* removed. Do not delete the original installation directory. This data will be updated to be used with Appointments 8.2.

- 1 Select **Start > Control Panel** from the Windows Start menu and then select **Add/Remove Programs** on the Control Panel. The *Add or Remove Programs* screen will appear.
- 2 Navigate or scroll through the list of installed programs until you find the entry for **Appointments**.

- 3 Click the program description once, and then click the **Change/Remove** button. A *Welcome* screen will appear with the options to (a) modify the program or (b) remove the program.
- 4 Click the radio button next to the **Remove** option and then click **Next**.
- 5 A confirmation screen will appear to verify that you want to remove the program: Click **Yes** to continue, **No** to cancel.
- 6 While the program is being removed, a *Setup Status* screen will appear with a progress bar that indicates the status of the removal. When the process has finished, the *Maintenance Complete* screen will appear.
- 7 Click the **Finish** button, and proceed to the “Uninstalling Interbase” section next.

Uninstalling the Interbase Database Engine

Appointments 8.2 is optimized to work with the Firebird database engine. Older versions of Appointments 8.x used the Interbase database engine, and Appointments 8.2 *will* work with Interbase. However, to achieve the best possible performance and to avoid unintentional behavior, it is our recommendation that you uninstall any previous version of Interbase. This will allow Firebird to be installed as you install Appointments 8.2.

- 1 Navigate to the Windows Control Panel (e.g., **Start > Settings > Control Panel** in 98se or **Start > Control Panel** in XP).
- 2 Locate and double-click the entry, *Interbase Manager*.
- 3 Click the **Stop** button to stop the Interbase service.

Alternatively, (a) open Windows Task Manager (e.g. press the **Ctrl + Alt + Delete** keys); (b) click the

Processes tab, locate the file **ibguard.exe**, click it once and then click the **End Process** button; and (c) then locate **ibserver.exe**, click it once, and then click the **End Process** button.

- 4 While still in the Control Panel, select the **Add/Remove Programs** option. The *Add or Remove Programs* screen will appear.
- 5 Navigate or scroll through the list of installed programs until you find an entry for **Interbase 6 Open Edition**.
- 6 Click the program description once, and then click the **Change/Remove** button. The uninstall process will begin, and after a moment, the *Select Uninstall Method* screen will appear.
- 7 Make sure that **Automatic** is selected and then click **Next**.
- 8 The *Perform Rollback* screen will appear. Make sure that **No** is selected and then click **Next**.
- 9 The *Perform Uninstall* screen will appear. Click **Finish**. Interbase will be uninstalled.
- 10 A Remove Shared Component screen may appear. Click the **Yes to All** button
- 11 After a moment, the uninstall process will be complete. Simply close the Add or Remove Programs screen and proceed to Part 2 of the Update.

Part 2 Reinstall Appointments



Note to program Administrators! For the smoothest possible transition, Appointments 8.2 should be installed to the same directory as the version that was just

uninstalled. This is not required. However, your data resides in the original directory, and reinstalling Appointments to the same location ensures that fewer steps will be required during the update process and it minimizes the chance of user error.

- 1 Place the Update Installation disk into the CD ROM drive (e.g., *d*:\, where *d* is the letter designation of the drive).

After a moment, the autorun should pull up an installation menu similar to the following.



Click the **Install Products** option. The *Install Products* screen will appear.



Note: If the autorun does not work, select **Start > Run** from the Windows Start menu and then type **d:\appts\setup** in the Open field (where *d*:\ is your CD ROM drive). Alternatively, click the **Browse** button to locate and select the correct path.

- 2 From the Install Products screen, click the **Install Appointments** button.
- 3 The *Welcome* screen will appear. Click **Next** to continue.
- 4 The *License Agreement* will appear. After you've read the agreement, click **Yes** to continue, **No** to cancel. The *Customer Information* screen will appear.

6 Enter your

- **User Name**
- **Company Name**

In NT-based environments, you'll have the option "Install this application for

- Anyone who uses this computer
- Only for me (*username*)

Click the option that best meets your needs.

Click **Next** when you have finished.

Note: This option is disabled (grayed) for operating systems not based on NT (e.g., Windows 98se).

7 The *Choose Destination Location* screen will appear.



Again, the easiest transition will occur if you install *Appointments* to the same location as the version you just uninstalled.

Either **(a)** Accept the default provided (*c:\appts*) or **(b)**

Click the **Browse** button to select an alternative location. Click **Next** to continue

8 The *Setup Type* screen will appear. You have the following options:

- **Single User or Server Install**—This option installs the program and data files for a stand alone installation or for network servers. ***The server installation must be done on the machine acting as the server.***
- Workstation—Installs the program files, but not the data files. Choose this option only for workstation installations in a network environment. ***A server installation must be done prior to a workstation installation.***

Select **Server/Single User** and click **Next** to continue.

- 9 The *Select Program Folder* screen will appear. Either **(a)** Accept the default location for you icons or **(b)** Choose an alternative. Click **Next** when you have finished.
- 10 A popup screen will appear to ask if you want to create a desktop icon for Appointments: Click **Yes** or **No** depending on your preference.
- 11 The *Setup Status* screen will appear with an in-progress hourglass and a progress bar indicating the percentage status of the Appointments installation.

When finished, the *Installation Wizard Complete* screen will appear. Click **Finish**.

- 12 You'll be returned to the Install Products screen. Click the **Main Menu** button twice to exit the installation.

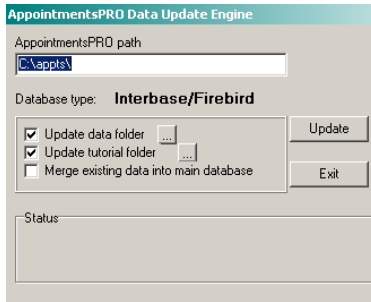
Note to Program Administrators:

Part 3 Run the Update Program

The final step is to run the Update program to bring your old database up to date for the changes made to the program.

- 1 Select **Start > Run** from the Windows Start menu and type **c:\appts\update** in the field provided. Alternatively, click the **Browse** button to search for the Update executable in the directory where Appointments 8.2 was installed and then double-click the **Update.exe**.

The *Appointments Data Update Engine* screen will appear.




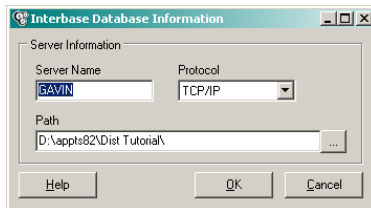
The Appointments path is detected by the Update program and filled in automatically. It is not editable.

The Database type is also detected and listed in the dialog. In the example illustration above, the database type is **Interbase/Firebird**.

- 2 By default the program is set to update both your Main Data and Tutorial directories. **Click the checkbox next to either of these options to deselect one of them. Click the checkbox again to reselect it.**



Note: If for some reason the new version of Appointments was installed to a location other than the previous version, or if you have an additional database to update, click the Select button  to navigate to the location of the database and select it. A screen similar to the following will appear.



The “Merge existing data into main database” option is for use with our multilocation product and should **not** be enabled (checked) for an Appointments update.

- 4 Once you have made your selections, click **Update**. The status window will show you the progress of the update.
- 5 When the update completes, click **Done**.

Once the update has been completed, you may start Appointments as you would normally.



Note: The update changes the default data directory back to the Tutorial database, as if this were a new installation. Remember to point the program back to your main database by selecting **Tools > Preferences** and clicking the radio button next to the Default Datapath field on the Directories tab. Click OK to complete the switch.

Updating Workstations

Your workstations can be updated one of two ways. First, if you chose to use the Automatic Network Updating option when you installed Appointments for the first time, then you do not have to do anything except complete the server update, which was outlined in the previous sections. The next time Appointments is started on each workstation it will automatically grab the necessary files off of the server.

Alternatively, if you did not choose the auto updating feature, then you simply need to complete Parts 1 and 2 of the update instructions. That is, you need to uninstall Appointments and Interbase on each workstation and then reinstall Appointments 8.2.

Select *Workstation* in Step 8 of the “Reinstall Appointments” section instead of *Server*, and follow the onscreen instructions.

Workstation installations require two additional steps in which (a) you must select or type the path to your server installation. This is critical in that the workstation installation uses information in an INI file in the server directory to create a proper connection to the database.

(b) Once you have entered the path to the server, the next step is to decide whether to update the workstations automatically. Follow the onscreen instruction provided.



Important! If you choose to use the auto update option, you must share the server program directory. You are not required, however, to share the data.

Do not repeat Part 3 of the instructions. Each workstation points to the data on the server.

Final Configuration

In general, if you are updating from Appointments 8.01.01 or 8.01b, all of your security setting settings should appear the same in Appointments 8.2 as they did in the previous version. Administrators should still verify that the security profiles and global user settings are set to the appropriate configuration.

If you updated from any version of Appointments 8.x other than one of the two listed above, administrator will be required to recreate security profiles and reassign them to their users. Please review the appropriate sections on security in the *Administration Guide* and the *Implementation Workbook*.

Two copy utilities are provided in User Maintenance (Tools > Preferences) so that a single user with a given security and display setup can be entered and then copied to all users who have the same setup. Instructions regarding the new security and user setup procedures can be found in Chapter 2 in the *Administration Guide* or in the *Implementation Workbook*.

Reloading the Allreports Package or Custom Reports



Note: In order for the reports to work correctly, users of either Appointments 8.01b or 8.01.01 must install the new report package. For all other users of Appointments 8.x, the Update installs these automatically.

Anyone who has updated their Appointments program to 8.2 and who has custom reports will be required to

reload those custom reports back into the database before they will be available to users. Follow and complete the instructions outlined in the following. Simply substitute the name of your custom report package for the *Allreports* package.

- 1 Select **Data > Reports** from the main menu. The *Manage Reports* screen will appear.
- 2 Click the **Import Reports** button once. An *Open* screen will appear. Browse to your Appointments installation directory and locate the file called *Allreports.rpk*.
- 3 Click the file description once and click *Open* or double-click the description to select it. A processing screen will appear while the new reports are being loaded into your database. Once the process is complete you'll be returned to the *Manage reports* screen.
- 4 If your organization has custom reports from SpectraSoft, you should load those now following the same steps outlined above. Simply substitute the custom report file name [*cumstomreport.rpk*] for the *Allreports.rpk*.
- 5 Once all of your reports have been loaded on the system, program administrators will have to adjust the security profiles to make the reports available for the appropriate users.

Using Appointments for Interbase/ Firebird with Windows XP Service Pack 2

Included in Microsoft's security update for Windows XP, Service Pack 2 contains a new Windows Firewall utility. As with any firewall, this utility is used to manage network activity or connectivity to and from

your Windows machine. By default, the firewall is turned on, and it will prevent any unsolicited connections to the server (including network users of Appointments). Similarly, stand alone systems that run Appointments may experience the same problem. To alleviate this situation, users have two options:

- a. The simplest option is to turn the firewall off. The disadvantage of this option is, of course, that the security benefit of the firewall is lost.
- b. Alternatively, the firewall settings can be modified to allow the appropriate connections to be completed so that Appointments can run and users can continue to take advantage of the security provided by the firewall.

In either situation, begin by

- 1 Selecting **Start > Control Panel > Security Center** from the Windows Start menu. The *Security Center* screen will appear.
- 2 Click the **Windows Firewall** icon once. The *Windows Firewall* screen will appear with the “General” tab forward



Note: If the “Don’t allow exceptions” option is checked, it must be deselected in order for Appointments to function.

If you don’t plan to use the Windows Firewall, you could simply click the radio button next to the “Off” option.

For those who will continue to use the firewall provided, complete the following.

- 3 Click the **Exceptions** tab once.

At this point, users may choose from two basic options:
(a) They can simply create a rule that allows full connectivity to Firebird (the database manager for

Appointments) or (b) they can open the port that Appointments uses to connect to Firebird.

Adding a Program Exception

- 1 Click the **Add Program** button once. The *Add a Program* screen will appear.
- 2 Click the **Browse** button and navigate to:

```
c:\program files\firebird\firebird  
1.5\bin\fb_inet_server.exe
```
- 3 Either double-click the file or click the file name once and click **Open**. You'll be returned to the Add a Program screen. The file that you selected will be listed in the "exceptions" list box.
- 4 Click the file name once to select it and then click OK. You'll be returned to the Windows Firewall screen.
- 5 Click the checkbox next to the fb_inet_server.exe option to select it and then click OK.
- 6 Exit the security screens and run Appointments in the normal manner.

Adding an Exception Using a Port

- 1 While on the Windows Firewall screen, click the **Add Port** button once. The *Add a Port* screen will appear.
- 2 Type the number **3050** in the Port number" field.
- 3 Make sure that the radio button next to the TCP option is selected.
- 4 Type an appropriate description for the port exception in the Name field (e.g., Firebird).
- 5 Click OK.

- 6 Alternatively, you could use the more advanced features and click the *Change Scope* button. The *Change Scope* screen will appear.
- 7 Modify the port settings as appropriate using the options provided.:
 - Any computer (default setting)
 - My network (subnet) only
 - Custom (enter a comma-delimited list of IP addresses in the list box provided)
- 8 Click OK until you are returned to the Windows Firewall screen.
- 9 Click the description (name given to the port) of the port exception you just created once, and then click OK.
- 10 Exit the security screens and run *Appointments* as you would normally.

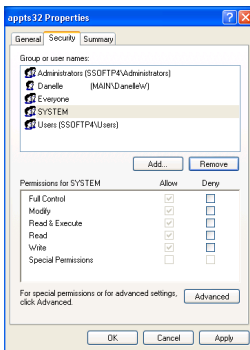
Setting Access Rights to Files and Folders on NTFS Volume

For users who are using *Appointments* on a machine whose volume is formatted to NTFS and on which file-level user security has been implemented, some basic user file access adjustments must be made in order for *Appointments* to function appropriately.

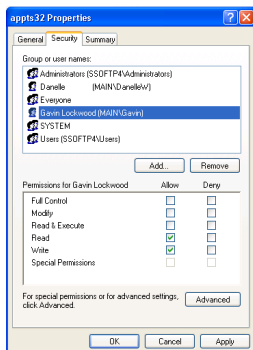
- I Users must be given *Read* and *Write* access to the *appts32.ini* file, which is located in the *Appointments* installation directory (e.g., *c:\appts* is the default location).
- II Users must be given *Full Control* rights to the *Windows Temp* directory. The reporting module (*Crystal Reports*) that *Appointments* implements uses the *Temp* directory to create its reports.

These changes must be completed on each workstation using an NTFS volume for every user who may be running Appointments from that workstation. The following example outlines the steps for setting the rights to the `appts32.ini` file. Follow similar steps for setting the Temp folder access rights: Simply make the appropriate substitutions where necessary.

- 1 Using whatever method appropriate for you, navigate to the Appointments installation directory (e.g., `c:\appts` is the default location).
- 2 Locate the `appts32.ini` file, right click over the description, and select Properties from the popup menu. The `<filename> appts32.ini` Properties screen will appear.



- 3 Click the Add button in the “Group or users names” panel once. The Select Users or Groups screen will appear.
- 4 Make the appropriate selections for this workstation and click OK when finished. The groups or users selected will appear in the panel.



- 5 Click the appropriate user or group description once to select it. Note in the previous example that the user Main\Gavin was added to the list and is selected currently.

The header for the Permissions (lower) panel will change to the description of the selected item. For example,

Permissions for <username>

- 6 Click the checkboxes next to the Read and the Write options in the Allow column.
- 7 Click the Apply button.
- 8 Repeat Steps 3–7 as necessary, and then click OK when finished.

Follow the steps outlined above to apply the appropriate access to the Windows Temp directory. Simply navigate to the Temp folder (e.g., *c:\Windows\Temp*) in Step 2 and substitute *Full Access* for *Read* and *Write* in Step 6.

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