

Revised - 29/10/2020

Customer EXACT Server Move Guide

- IF THE NEW SERVERS EXACT VERSION IS HIGHER THAN THE OLD SERVER PLEASE MAKE SURE YOU HAVE A BACKUP/COPY OF THE EXACT DATA (DATABASE FILES, NOT FOLDERS) IN CASE ANYTHING GOES WRONG DURING THE UPGRADING PROCESS
- If you are reverting to an older backup due to data corruption/virus/lost data issues please contact SOE so we can make sure old communications or duplicate course of treatment, NHS claims are not created or sent.
- Please make sure the EXACT server and Workstations meet our [minimum requirements](#).
- If a Scottish NHS practice (eDental) please contact the support team first as there will be an additional SQL database we need copied over. Usually located here: **C:\Program Files\Microsoft SQL Server\MSSQL12.MSSQLSERVER\MSSQL\DATA**

Installing the Exact server component and pointing to Exact Database

1. If replacing Workstations too an EXACT admin user should log in and go to configure, Licence manager and "delicence any workstations that are about to be replaced. If this cannot be done now SOE can assist after the server move is complete.
2. Uninstall Exact Server from the Old Server. This makes sure no Emails, SMS, Online Bookings etc can connect to the wrong database going forward.
3. If you require the most up to date version of Exact server then you can Download the latest version of Exact from <https://portal.softwareofexcellence.com/> to your server machine (or we can get the build transferred to your server if any issues). If you require an older version than the latest, then SOE can transfer this over to the new/temporary server for you although we would recommend always updating to the latest version.
4. Follow install wizard through to completion. Where it mentions about where the data is stored, ignore this and leave as C:\ProgramData\Software of Excellence\EXACT Server\data as you will update the path later.
5. Copy a complete copy/backup of the most up to date EXACT data folder to your preferred location (We recommend on a separate drive to the program files, i.e D drive) Share this over the network with full permissions as name "EXACTData". Change the **databases.ini** file located on the server in **C:\Program Files (x86)\Software Of Excellence\Exact Server** (open in notepad) to the path of where the current practice data is stored. i.e Practice=D:\Exactwin\Data

If you use Examine Pro please contact SOE & speak to the digital imaging team to confirm where the Xrays are stored as these will also need to be moved over. If using 3rd party software speak to your software provider to find out where the Xrays are and the best process for moving and configuring on a new server computer.

6. Double click "Exact **Server** Administrator" on the desktop to start if it is not already running.
7. Right click Exact **Server** Administrator and "stop database **server**". Wait a few seconds, then right click and "start database server". This will refresh the data paths and shares/permissions you have applied to the data.
8. If the **EXACT** data is already up to date then you can now install the additional software or drivers for any other modules the practice may use. i.e Clinipad, Examine Pro, Online booking If you need to upgrade the **EXACT** database attempt to log into **EXACT** on the server (even if it doesn't have a licence for use) and it will upgrade the database.

Installing the workstation component on the server

1. You should have an "Install Exact Workstation" icon on the desktop and can skip step
If you do not, browse to the **server** shared folders [\\{servername}](#)
2. Find the folder called "EXACT Resources" and within this go to "Workstation Installer" then double click the icon named "Install Exact Workstation.exe".
i.e [\\server\exactresources\workstationinstaller](#)
3. Follow the install wizard through to completion.
4. Double click the Exact Dental icon and log into the data using one of the normal user password to confirm all ok. (Any problems here would best be looked at by SOE Support, i.e Need a licence to log in as currently assigned to an older computer).

Configuring the existing workstations.

1. Double click the Exact icon and it should prompt to choose a new **server**. Choose this from the drop down list and should log in correctly. (If **server** name has been kept the same this should work as normal as long as the computer can connect to the server over the network in Windows).
If any issues, you may need to edit the Login.ini file to set the new server name. This is located at C:\ProgramData\SOEI\EXACT
2. Open the file and edit the line starting "CurrentServer=" to include the correct server name. (e.g CurrentServer=Server) **Do not use IP addresses** as some EXACT features will not function correctly unless a machine name is specified.
3. Launch **EXACT** to make sure it loads and mentions the correct servername in the bottom left of the login screen.

Final checks

The practice may have additional modules/software that need installing and re-configuring.
If using any of the following please contact SOE so that they can reconfigure:

- **Online Booking**

- **Patient Portal**
- **EXACT Auto Updates**
- **MPC (cloud reporting)**
- **Clinipad**
- **Examine Pro**
- **eDental (NHS Scotland)**

Please also make sure that you add exclusions into any anti-virus installed on all computers to reduce the chances of performance issues or EXACT/Examine pro being quarantined. The exclusions can be found here: <https://soidental.atlassian.net/wiki/spaces/PHS/pages/302187234/>