

Tracker Migration Guide

Please follow this Guide exactly to ensure safe and secure migration of your Tracker System.

Overview

Moving Tracker from one computer to another is a relatively easy task. It is done via 3 basic steps:

1. *Copy* the Tracker folder and its contents over from the old computer to the new computer.
2. *Install Tracker* on the new computer (make sure that the destination directory refers to the directory where you copied the Tracker files “i.e. **C:\Dental\Tracker**”).
3. If the old computer is going to be a Workstation on the network, *delete* its Tracker folder once you are confident that the data has been successfully moved to the Server. On this computer, also delete the Tracker.ini file (usually located in the WINDOWS directory). Perform a Workstation installation (see step 3).

Optionally, you may want to retain your local Tracker environment settings (such as window positioning etc). These settings are stored in the **TRACKER.INI file (located in the Windows directory)**. You can copy this file from the old computer to the new computer. However, you should manually edit this file first to ensure that all the paths are correct for the Tracker installation on the new server. Other issues to consider are discussed on the final page of this document. Below you will find the above procedures described in more detail.

Step by Step Procedures

Step 1

Copy the Tracker folder and its contents from the original computer to the new computer. If the two computers exist on a network together, this can be easily done by copying the files over the network. Otherwise, you will have to copy the files to disk/backup/CD-Rom and transfer them to the new computer.

Step 2

After copying the Tracker folder to the new server, install the latest Tracker ChairSide Release CD over this folder. For example: if you copied Tracker to **C:\Dental\Tracker**, when installing the CD the destination must be **C:\Dental\Tracker**. Make sure you know which version of Tracker the office is running so that an older CD does not get installed accidentally.

When installing a newer version of Tracker a database, migration may be required when loading Tracker for the first time (eg. ‘Tracker has detected an old database (v10.3) and needs to update to (v10.4) would you like to update now?’). Simply answer ‘Yes’ and click on ‘Start Migration’. When completed the database migration window will display “(0 problems encountered)”. You will need to open Tracker again once this is done.

Step 3

Configuring original computer as a workstation (if applicable):

Once you have confirmed that the new server has all of the Tracker information on it, it is a good idea to remove the Tracker directory and its contents from the original computer. As well, delete the TRACKER.INI file (this is located in the WINDOWS directory). Once this is done, you can install Tracker as a workstation on this computer. This will reconfigure the machine for its new role and update registry entries and shortcuts accordingly.

- ☑ To do this:
 - ✓ Make sure the Tracker folder is shared with Full Permission on the server.
 - ✓ Browse the network to the server computer (i.e. \\server\dental\Tracker)
 - ✓ Run Tracker.exe to launch the workstation installation and follow the prompts.



Note

Note: If using a mapped network drive, never map the network drive to the Tracker directory. Always map the network drive to a lower level so that you have (i.e. T:\Dental) from the workstation.

Optional: Import Local Tracker environment settings

If you would like to maintain user preferences from the original computer, you will need to bring the TRACKER.INI file over from the original computer. It is located in the C:\Windows directory and should be copied there on the new computer as well. You will need to edit the file in notepad to ensure that the paths are correct since Tracker may be installed in a different directory from the original installation on the old server.

- ☑ **Post-installation testing**
 - Have somebody at the office run through Tracker and make sure the patient data is restored and current. Have that person print one of each of the following components:
 - ✓ A day-sheet. This tests printing from the Far point Spread.
 - ✓ An invoice. This tests VB printing.
 - ✓ An insurance form. This tests the tinsform.dll.
 - ✓ A statement. This tests Crystal Reports printing.

If the office is using EDI, have them send a claim for both the NDC and Shared Health networks. To find out which insurance companies are on these networks, please consult Appendix A of your EDI Track manual.



Note

Note: If the old computer is not being used as a workstation on the new system, it is important not to use Tracker on the old system. If you do, any changes you make will not be maintained on the new system.

Issues to consider

If you are replacing the server only but keeping the existing workstations, it is ideal to do things in the most seamless way possible. For example, if all the workstations reference Tracker via UNC, it might make sense to give the new server the same name as the old server. As well, the shares should be the same as on the old server. This way, the new server drops into the network and all existing links from the workstations continue to function without any intervention.

If you need further assistance please contact us at our regular technical support number [\(416\) 222-0123](tel:416-222-0123) or [1\(800\) 922-7434 Extension 2](tel:1-800-922-7434). However, please read this FAQ carefully, because we have tried to be as explicit and thorough as possible with this particular topic of information. If this FAQ was not clear or helpful, we would appreciate your comments or written responses.

Backtrack Server Migration

When swapping servers, login to mydata.bridge-network.com and delete the previous machine. Regardless of the new machine's name, BackTrack keeps all previous computers' saved data. Be sure to delete the old one or you will be using unnecessary space and increasing your bill.

Backtrack: Signing Up

To sign up for BackTrack, please call TBN Support and be sure to provide us with your email address - specifically an email account that can be checked from the Tracker Server. You will then receive a Welcome email with a hyperlink. Click this link from the Server and you will be taken to a page to begin downloading BackTrack. It can be installed on as many computers in the office as you like in the event you want to back up personal/non-Tracker related files as well. When BackTrack is finished downloading, open it to begin the setup process. You can click next for most of the setup with defaults selected; double-checking what folders you want to backup when prompted with a list of checkboxes.

When setup is finished, right-click the BackTrack icon in your System Tray and select Options. You will be prompted for your username and password. Next, select the Folders tab. You may be prompted to start the Online Backup Service. This can be done via Windows Management. Right-clicking My Computer on your desktop and choosing Manage will get you there. Select Services and Applications --> Services. Locate Online Backup Service and start it.

Go back into the Folders tab and expand the C: drive. Select the Dental folder with a checkmark, and everything inside of it will be added as well. Click Ok.

Finally, click the Open File Protection tab and click the giant Enable button. This will allow backups to occur even as the databases are in use.

ChairSide Imaging: Server Migration

Although we recommend keeping the default paths, the location of database and Images should always be checked before the migration takes place. This can be done by loading ChairSide Imaging and clicking on Configuration --> Options. The images path is found under the [Images] tab and the database path is found under the [Database] tab.

If you upgraded from a previous version of Tracker your images folder may be in a completely different location so it's important to double check.

ChairSide Charting: Server Migration

Double check the location of your Practice Logo in Options as it may point to an image located outside of Tracker's folders.

