# IDEXX Cornerstone*
## Practice Management Software

## IDEXX Cornerstone* Server Swap

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| **Document Purpose** | This document outlines the transferring of Cornerstone* data to a new or alternate server. A physical backup of the practice's data is crucial to ensuring data integrity, and a successful transfer.<br><br>This document is intended for use in conjunction with assistance from a local hardware technician, IDEXX technician, or other individual with computer networking expertise.<br>**Notes:**<br>• Please contact IDEXX Support at 1-800-695-2877 if additional assistance is needed. This call may be billable.<br>• Please verify a local administrative login exists for all workstations if in a domain environment.<br>• Please verify the new server meets the Hardware and Operating System Guidelines and all computers are configured to IDEXX recommended settings. These additional documents are available at www.idexx.com/cornerstoneresources or through IDEXX Support. |
| **Information Gathering** | **Identify Cornerstone software version, Clinic ID and activation key:**<br>1. At the Cornerstone window, click **Help > About IDEXX Cornerstone**.<br>2. Take note of the **Cornerstone build number** (e.g., Cornerstone 8.3.54.20).<br>3. At the About IDEXX Cornerstone window, click **More**.<br>4. Take note of the **Clinic ID** and **Activation Key** in the Clinic Information area.<br>**System Information:**<br>Take note of the following:<br>• Server name<br>• IP configuration<br>• Domain Environment<br>    o DHCP server configuration<br>    o DNS forwarders<br>    o Custom user accounts or group policies<br>    o Terminal Services Client Access Licenses<br>• Installed printers and the local or TCP/IP ports they occupy<br>• Determine if a workstation is configured to run any end of period processes and take note of it. |
| **Shut Down the Cornerstone Database and Services** | 1. Exit Cornerstone on the server and all workstations.<br>2. Shut down the Cornerstone database engine on the server:<br>    • Cornerstone 8.3 and higher<br>        a. Double-click **Cornerstone Database Server** on the desktop and click **Stop All**.<br>        **Notes:**<br>        • You may need to right-click the icon in the system tray and select **Open** if it is already running.<br>        • Cornerstone 8.4 or later may have an SQL icon for IDEXX PACS that appears in the system tray, near where the time is displayed. If it is visible Right-click on the icon, then select Exit to close.<br>    • Cornerstone 8.2 and lower<br>        a. Right-click the **SQL** icon that appears in the system tray, near where the time is displayed.<br>        b. Select **Exit**.<br>        **Note:** In Cornerstone 8.2, the **IDEXX Application Server** will need to be manually stopped via **services.msc**.<br>**Note:** If running a single-user system with Cornerstone 8.1 or lower, the above section is not applicable as the Cornerstone database is closed when exiting Cornerstone. |

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| **Back Up Necessary Data** | **Note:** The default location for the following folders and files is the C: drive. This location may be different for older installations of Cornerstone, or if installed to a non-standard directory.<br>**Required <u>folders</u> in C:\Cstone to back up:**<br>(Depending on Cornerstone version, some of these folders may not be applicable.)<br>• DailyCC<br>• Images<br>• SamQuery (may not be present)<br>• Spell<br>• Share<br>    **Note:** Exclude the Install, Logs, and Outlook subfolders.<br>**Required <u>files</u> in C:\Cstone to back up:**<br>• Cstone.db<br>• Cstone.log<br>**Required <u>folder</u> for IDEXX PACS to be backed up, if present:**<br>• Program Files (x86)\IDEXX\IDEXX-PACS<br>    or<br>    Program Files\IDEXX\IDEXX-PACS<br>**User Data to back up:**<br>**Note:** User data is typically found in C:\Documents and Settings\(username)\, or C:\Users\(username)\.<br>• Documents<br>• Favorites<br>• Desktop<br>• Email (e.g., Outlook®, Outlook Express, Windows Live® Mail)<br>• LifeLearn®<br>• QuickBooks®<br>• Any additional data |
| **Copy Files to Another Workstation (redundant backup)** | This section provides a second backup copy of the server data on one of the workstations on the network, for redundancy purposes. This section is not necessary if using a single-user system.<br>**Notes:**<br>• Before proceeding, please ensure enough hard disk space exists on the workstation for the backed up data.<br>• Transfer times vary depending on total size of the data and the network speed.<br>1. Create a directory on one of the networked workstations called ServerData† (where † is the date the data was transferred, e.g., 05_05_2014).<br>2. Copy the file and folders backed up in the previous step to the new ServerData directory on the workstation. |
| **Shut Down and Disconnect the Existing Server** | 1. Shut down the existing server.<br>2. Take note of where the cables are currently attached, as this may be a useful reference when attaching the cables to the replacement server.<br>3. Unplug all cables, and remove the existing server. |
| **Install the New Server** | 1. Put the new server in place.<br>2. Plug in all cords and cables.<br>3. Power on the server.<br>4. Log in with the appropriate administrative user name and password.<br>5. Using the information gathered in the previous section, re-configure the server. |
| **Set Up Cornerstone on the New Server** | **Note:** If Cornerstone has already been installed on the new server and the Cornerstone version and activation key are <u>identical</u> to the information gathered from the information gathering section then Cornerstone does not need to be reinstalled. The restore steps will still need to be followed.<br>1. Install Cornerstone and any applicable service packs using the installation documentation provided with your release.<br>    **Note:** Installation documentation can be found here:<br>    http://www.idexx.com/cornerstoneresources<br>2. Restart the server when finished installing the release and any applicable service |

packs.
3. When the server restarts, log in again as an administrator.
4. Close the Cornerstone database.
   - Cornerstone 8.3 and higher
     a. Double-click **Cornerstone Database Server** on the desktop and click **Stop All**.

        **Note:** You may need to right-click the icon in the system tray and select **Open** if it is already running.

        **Note:** Cornerstone 8.4 or later may have an SQL icon for IDEXX PACS that appears in the system tray, near where the time is displayed. If it is visible Right-click on the icon, then select Exit to close.
   - Cornerstone 8.2 and lower
     a. Right-click the **SQL** icon that appears in the system tray, near where the time is displayed.
     b. Select **Exit.**

        **Note:** In Cornerstone 8.2, the **IDEXX Application Server** will need to be manually stopped via **services.msc**.

   **Note:** If running a single-user system with Cornerstone 8.1 or lower, the above section is not applicable as the Cornerstone database is closed when exiting Cornerstone.
5. The Cornerstone backup can either be restored from the networked workstation, or the backup made in the previous section. Be sure to put the data back into the X:\Cstone folder (where X is the drive letter Cornerstone is installed).
6. Restart the Cornerstone database.

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| **Update the Database** | **Note:** Before continuing, ensure the previous server is powered off. If images are stored on a separate workstation, ensure the workstation is powered on.<br>1. Click **Start > Run**.<br>2. At the *Run* window, type **X:\Cstone\csupdate,** (where X is the drive letter Cornerstone is installed) and press **Enter**.<br>3. Click **OK** to start the database update.<br>**Note:** A warning message may appear asking to shut down the IDEXX Vetlab Station. Click **OK** if there is no IDEXX Vetlab Station at the practice, or it is already shut down.<br>4. Several messages similar to "*The location in the database does not match the location set up by the install. Would you like to update it now?"* may appear. Click **Yes** to each of these messages to update the locations in the database.<br>5. When the update window states "*Database key validation successful"* click **OK***.*<br>6. Open Cornerstone and log in. |
| **Set Up Printers** | 1. Set up the printer(s) in Windows.<br>2. Set up the printer(s) in Cornerstone. To set up printers, go to **File > Printer Assignments**. |
| **Configure IDEXX PACS** | This step is only applicable to Cornerstone 8.4 or later if IDEXX PACS is installed. To restore and configure IDEXX PACS please contact an IDEXX Digital Support Consultant at 1-877-433-9948. |
| **Re-using the Original Server** | If the original server is going to be used as a workstation on the network, it is necessary to reinstall Cornerstone and uninstall all server-specific services before connecting the computer to the network (e.g., DHCP, Active Directory, DNS).<br>Contact IDEXX Support if additional assistance or information is needed. This may be billable. |

**IDEXX**
**LABORATORIES**