
M/Docs II – New Network Installation (Importing Existing Local Data)

(Click here to print these directions)

Important Note: To ensure your installation process runs smoothly, we strongly recommend that you ensure that your new server is up to date with the current Microsoft Windows Updates.

Setting up a network install consists of the following:

1. Downloading & Installing M/Docs II on the PC that acts as the M/Docs II server.
2. Configuring the PC that acts as the M/Docs II server.
3. Backing up User data from existing local installs.
4. Importing User data into the new M/Docs II server.
5. Connecting the user workstations to the new M/Docs II server.

1. Downloading & Installing M/Docs II

Click on the link below to download M/Docs II on any PC that will run M/Docs II, including the computer acting as the M/Docs II Server:

[M/DocsII Installer](#)

You may be prompted to Run, Save or Cancel, depending on your web browser and Windows security settings. If prompted, click **Save**, and save the file to a local location, such as a folder on the C drive, or the Desktop as long as it isn't directed to a server – if you are unsure about this, consult with your IT personnel.

Once the download has been completed, double click the file to begin the installation.

2. Server Configuration

Important Note: The firewall should allow SQL Server traffic, which is usually on port 1433 and the SQL Browser on Port 1434, unless the administrator changed these. General instructions for configuring the windows firewall to allow SQL Server can be found at <http://msdn.microsoft.com/en-us/library/ms175043.aspx>. For other firewalls, please check the firewall provider's instructions.

TIP: Even a user's workstation can act as the M/Docs II server for your office.

Once installed, you will need to configure this installation to act as the M/Docs II server. Here's how:

1. Click on the **Start** button.
2. Click on **All Programs**.
3. Click on the **Miller Davis Company** folder.
4. Click on the **MDocs II 3.0** folder.
5. Click on **MDocsII Configuration Editor**.
6. Click on the **Workstation Configuration Wizard** button.
7. Follow the onscreen prompts.
8. When the wizard is complete, click **Finish**.
9. **Close** the M/Docs II Configuration Editor.

3. Backing up User data from existing local installs

The next step is to back up the User data from each local install. Here's how:

1. Open M/Docs II. **Close** the Welcome screen by clicking on the lower "X" button in the upper right corner; this will leave you with a blank grey screen.
2. Click the **Tools** menu.
3. Click the **Backup User Database** link.
4. Choose a **Local** location for the backup such as a folder on the C drive, or the Desktop as long as it isn't directed to a server and click **Save**. Click **OK** when prompted.
5. Once the backup has finished, copy or move the file to a **Local location on the server**, such as a folder on the C drive, or the Desktop as long as it isn't directed to another server.
6. Repeat this process with other workstations, if needed.

4. Import User data into the new M/Docs II server

Now that the M/Docs II server has been set up and the User data has been backed up, it is time to import the data into the centralized server. Here's how:

1. Open M/Docs II. **Close** the Welcome screen by clicking on the lower "X" button in the upper right corner; this will leave you with a blank grey screen.
2. Click the "Tools" menu and select "Import User Data."
3. When prompted with a window asking if you would like to "clean all of the existing data from the user database," choose **No**.
4. When the **Import Progress** window appears, select the first radio button.
5. Locate and select the backup file(s) you saved previously from the local installs, by clicking the "..." ellipsis button to browse to the appropriate backup file, then click **Open**.
6. Follow the onscreen prompts to complete the import process.
7. Repeat this process with any other User data backups you wish to import.

5. Connecting the User Workstations to the new M/Docs II server

Once the server has been configured and the User data has been imported, go to each workstation and use the same M/Docs II Configuration Editor to connect the workstation to the M/Docs II server.

1. Click on the **Start** button.
2. Click on **All Programs**.
3. Click on the **Miller Davis Company** folder.
4. Click on the **MDocs II 3.0** folder.
5. Click on **MDocs II Configuration Editor**.
6. Click on the **Workstation Configuration Wizard** button.
7. Follow the onscreen prompts.

8. When the wizard is complete, click **Finish**.
9. **Close** the M/Docs II Configuration Editor.

Note: There are 3 databases –

MDMain, which houses the forms.

MDUser, which houses the data that users input/save.

MDData, which houses each user's preferences.

The MDMain and MDUser databases can be networked, however the MDData database must always be local to each workstation.

You can always check to see if a workstation is connected to the networked MDMain and MDUser databases by clicking on the **Help** menu at the top of the window and choosing **Database Information**.