



SOS Suite Installation Guide

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SOS strongly recommends that you read all relevant sections of this document prior to beginning your installation!

Overview

First time installation of the SOS Suite or any of its components, such as Office Manager (OM) or SOS Case Manager (CM) involves installation of the SOS program files, Sybase SQL Anywhere (SA) files, and various other licensed third party software components that must be present for the software to run. Any custom components should be installed *after* completing the installation on the CD.

Upgrading from SOS 2009 and Older to SOS 2010

Shortcuts and services used to start the database on servers **will no longer work!** You must modify or re-create those objects to reference the new database engine, DBSRV11.EXE.

If running on 32-bit Windows, and you have installed the software on the C: drive, the command line to start the network database server would be:

`c:\sos\sa\bin32\dbsrv11.exe @c:\sos\server.prm c:\sos\data\sosdata.db`

If running on 64-bit Windows, and you have installed the software on the C: drive, the command line to start the network database server would be the same as above, or you can use the optional 64-bit database engine with this command line:

`c:\sos\sa\bin64\dbsrv11.exe @c:\sos\server.prm c:\sos\data\sosdata.db`

Those with 64-bit Windows will have more flexibility and better performance by using the 64 bit engine.

To replace your previous Windows Service with a new one for the SOS 2010 database engine, see: <http://www.sosoft.com/fod/doc430-startingdbasservice.pdf>

Pre-Installation Recommendations

1. The SOS installer requires up-to-date Windows Installer components to be present on your system. At present, that means **Windows Installer**. In addition, the software requires that at least **Microsoft .NET Framework 3.5** be present.

Both can be added to your system using the Windows Update service accessed through Internet Explorer (Tools > Windows Update, select “Custom” and browse for *.NET Framework*).

A prompt will come up automatically if you don't already have the current version of Windows Installer.



2. **Be sure to backup or copy your entire SOS folder** to another location on your system before starting the SOS installation. Having the entire folder backed up will allow you to quickly and easily revert to the previous version if the new installation should fail for any reason.

Network Installations

The SOS applications are “client/server” programs. Unlike less sophisticated network applications, client/server applications divide the work between the users’ workstations (called *clients*) and the computer running the *database server* software. The result is higher performance, much less network traffic, the ability to support more users, and data that is much more resistant to corruption.

Installation on a network requires that the database server component be installed on the computer that you have designated for this purpose. Ideally, this will be a high performance system with a large amount of RAM and at least one large, fast, hard drive. In addition, you will be installing the SOS application files on your file server.

Tip *TIP By default the database server programs, the application programs, and the data files will all be installed on the same drive on the same server computer. In all cases the data files must be located on the same physical server computer as the SOS database server (SA) programs.*

After installing the software on the server, you must then install the client software and appropriate shortcuts on each workstation that will be using the applications. Install each client directly from the SOS CD, or from a copy of the CD on a shared network drive. Install to a local hard disk. Unless there is a compelling reason to the contrary, we strongly recommend that you accept the default destination of C:\SOS. Doing so makes support, if you should need it, considerably easier. See the section entitled **Setup Network Client Workstations** below.

System Requirements

Most any Windows computer (other than netbooks) purchased after 2007 should be able to run SOS software quite well. Installations with large patient loads and high transaction volume should consider a 64 bit Windows server, with additional RAM, and faster, larger processors for best performance. For current system recommendations and specifications, see document 402 in the SOS web site Document Library:

http://www.sosoft.com/fod/doc402-sys_recgs.pdf

Preparing for Installation

Prior to starting the installation, you should terminate any programs that you have running, **especially any anti-virus software**. All SOS products are checked for virus



before distribution, but if you are concerned about virus infection, feel free to scan the CD and to reload your virus software after the installation is complete and to scan for viruses at that time.

The components you need to install will be determined by the type of license you have purchased (Standard or Pro; Standalone or Network).

By default, the software will install as a Trial Version, which allows you to add new information for only 45 days, beginning with the first day of actual use. If you have purchased a license, follow the instructions on the license sheet in your package to unlock the software and encode it with the name of your practice or organization.

If you cannot find your license sheet, you can temporarily install the software in the default **Trial Version** mode and call SOS for the licensing details when convenient during the next 45 days. The product can be unlocked at any time during the 45 day trial period without loss of data or the need to reinstall.

Installing the Software

The first part of the installation is very similar whether you are doing an installation on a standalone computer or on a network.

Network upgrade notes

If you are upgrading a previous installation on a network, verify that the database is running before starting the server upgrade. Keep in mind that if you are running the database as a background service, there may be no window or icon to indicate that it is running. You can use Task Manager to verify that the *dbsrv9* or *dbsrv11* process is running. After you have installed the server upgrade, confirm that the database is running. It must be running when you upgrade the client workstations to avoid errors at the end of the client install.

Network Installation

If you are installing a network version, start with the server installation. **Be sure that you log in to your server using an account (ID) that has full “administrator” privileges.** Installation of the server components must be done directly on the server system. After installing the server software, you must install the SOS software on each workstation that will be using the product. ***You should not install the client (“network workstation”) software on the server,*** even if you plan to use it as a workstation (which, once again, is NOT recommended). All necessary components are included in the server installation process.



Installation/Upgrade steps: Standalone and Network

1. Insert the SOS CD.
2. If your computer has the AutoRun feature enabled for your CD-ROM drive, the SOS CD “Welcome” window will appear. If so, skip down to step 5. Otherwise, click on the **Start** button on your desktop (usually the bottom left corner of your main Windows screen), then **Run**.
3. Type the appropriate letter for the drive in which the installation disk was placed, followed by a colon, a backslash, and the word **SETUP**. For example, if your CD-ROM drive is letter “D”, then you would type
D:\SETUP.
4. Click **OK**. The SOS CD Welcome window will appear.
5. Read the Welcome window and click the **Continue** button at the bottom of the window.
6. At the “What would you like to do?” menu, select **Install Products**.
7. If you do not already have a copy of Adobe Acrobat Reader installed on your system, visit www.adobe.com to get the very latest free version of Adobe Acrobat Reader. If you have the product already installed or have completed that installation, choose **SOS Applications**. (If you are a Maryland agency that has licensed the MAPSS extensions to the software, then select **SOS Applications - MAPSS/CBH Only** on this menu instead.)

***Note Adobe Acrobat Reader** is needed to view or search the electronic versions of the product manuals and to view some of the documentation on the SOS web site. Acrobat Reader is distributed with many software products, so you may already have it on your system. If you want the latest version of Acrobat Reader can be downloaded for free directly from the Adobe web site (www.adobe.com).*
8. The SOS CD program will launch the installation program. This process normally takes a little while. Please be patient. A logo window will appear. Click **Next**.
9. When the installer “welcome” screen appears, click **Next**.
10. Read the license agreement. This is the same agreement you received on paper when you first started using the software or last renewed your support contract. Assuming that you agree to the conditions, select **I accept the terms...** to continue. If you select **I do not accept the terms...** you will not be able to proceed with the installation.
11. If you are updating a previous installation, a warning about the importance of backing up your current program and data files will appear. SOS recommends that you *copy* (not move) your entire SOS folder to another location on your hard drive prior to continuing, even if you believe that you already have a reliable backup of your data. You can leave the install window up while you do that, or you can cancel the installation and start over once you have completed your backup. Click **Next** when ready to continue.
12. On the next window, specify which installation you wish to do.



- w** If you are installing for use on a single computer, select **Standalone (not networked)**.
- w** If you are doing a network installation of SOS and this computer is to be the database server, select **Network server**. Note that you should use this selection no matter which version of Windows you are using on your server computer. Note that it is not required that the database be run on one of Microsoft's official "server" operating systems, though it is recommended in larger organizations.
- If (contrary to SOS recommendations) you are not using a dedicated server computer, you should still select **Network server** to install the software on the "main" computer.
- w** If running the installation on a workstation computer that will be accessing the database on a separate server computer, select **Network workstation (client)**.
13. Select the appropriate setup type. Unless specifically instructed by tech support to do a **Custom** installation, just select **Complete**. In most every case, that is the correct selection. **Custom** is only used to install extra files that are not generally needed, or to do a specific repair or file replacement. Click **Next**.
 14. Review the license registration information and click **Next**.
 15. Select the Program Folder in the Start menu that the installer should use for the SOS icons and shortcuts. Accept the default by just clicking **Next**, unless there is some pressing reason to do otherwise.
 16. A summary window will appear, listing the actions to be taken by the installer. Review this list for accuracy, then click **Next**.
 17. InstallShield will start copying files and configuring your system. There is a third-party component, Crystal Reports runtime, that must be installed, but that will not happen until the initial installation is complete and you have rebooted your system. These are large components, so please be patient.
 18. When the installation is complete, you will probably be prompted to restart your computer. If you select *Yes* and click **Finish**, the installer will shut down and restart your computer automatically. If you prefer to handle that yourself, select *No*, but don't forget to shut down and restart prior to running the software. This step is necessary in order to complete the replacement of certain files that cannot be copied once Windows is running, and to install the current Crystal Reports runtime component.

If the installer does not prompt you to reboot, you should do so anyway. The Crystal Reports components are installed immediately after the reboot.
 19. When you close the installer, you will return to the CD menu. Click **Exit**, the **Exit Now**.

Setting Up Network Client Workstations

Always install the product on the computer you are going to use as your database server first. If you have not already done the server install, do it before proceeding, according to



the instructions above. Make sure that the database is running on the server before installing the software on the workstations. Instructions for starting the database on the server can be found on page 8. If it is not already running, start it now.

To install the client software on a computer on the local network, shut down any running programs on the workstation, especially any anti-virus software.

The installation is very similar to the installation on the server, except that when you get to the **Setup Type** window, select **Network workstation** rather than the server selection.

Starting OM or CM on a Standalone Computer

* If you have firewall software running on your computer, it may ask whether the SOS programs should be permitted to run when you launch them. Please indicate “Allow” or the equivalent. If you “Block” these programs, you will not be able to run SOS applications unless you disable or reconfigure your firewall software.

If you are running a standalone version of your SOS program, you can start the program just as you would any other. Just select the **SOS Login** menu item under **Start > Programs > SOS Applications**, or click the **SOSLogin** icon the installer placed on your desktop. Even in a standalone situation in which all the components are installed on the same computer, the SOS programs are still *client/server* applications (with both the client and server components running on the same computer), so you may note a short delay and some differences in what you see on the screen as the personal database server program, and then the SOS program itself, loads. There will be a message about connecting to the database, then the password screen will appear. The Windows taskbar will show the database server running as an “SQL” or lightning bolt icon in the system tray in the lower right corner of your Windows desktop. The database must be running for the application to access its data. When you exit the last SOS application on a standalone system, it will automatically shut down the personal database server. If for some reason it does not close automatically, you can click the lightning icon in the system tray to close it down manually.

A Note about Backups in a Network Installation

Backups are an essential part of responsible business computing and are mandatory under HIPAA regulations. You should backup your SOS database at least once each day by backing up all the files in the \SOS\DATA directory (folder) on your server (11 “DB” files and one “LOG” file). **Under normal circumstances you will not be able to backup the database files while the database is running, so it is critical that you stop the database server software prior to starting your backup.**

IMPORTANT: Some third party backup products claim to be able to backup a running Sybase database. This is a reference to the Sybase Adaptive Server *Enterprise* product



and is NOT applicable to the SQL Anywhere product used by SOS! It may appear to back up the files, but if you ever had to restore from such a backup you would find the database to be corrupt and unusable. There are ways to backup a running database if that is essential in your scenario. Please carefully review the following article:

<http://www.sosoft.com/userdocs/?s=backup+advanced>

Probably the best way to guarantee that the database is available for backup is to modify the startup command to include a parameter that will cause the database server to shut itself down at a specific time every day (prior to the time that your backup is scheduled to run). Each section below shows an example that includes this auto-shutdown option. The startup command you use on your own system should include this “time to quit” (-tq) parameter.

Starting the Network Database Server

In a standalone installation, simply clicking the icon for OM or CM will start the database and connect. It is not quite that simple on a network. By following the previous steps, you have installed the database server programs on your server computer, but *you will not be able to run OM, CM, Appointment Scheduler, or most SOS utilities on your network workstations until you have started the database server software.*

How you start the database server depends on the operating system you are using. This installation overview provides instruction on starting the SA server using the default settings. For best performance the startup command for the server software should be adjusted for your particular network. Basic instructions follow, but to get the most out of your system, we recommend that you carefully read the **Networking Guide** chapter in the on-line **Technical Reference** manual, SOSTECH.PDF, which the installer copies to the SOS folder of each computer.

Running the Database Server

You have the option of running the SA database server as a foreground application after logging onto the server console, or as a background *service*. When configured as an automatic service, the SA server software will run whether or not anyone has logged into the server console. There are obvious security advantages to such a configuration.

Starting From the Menu

To start the server as a normal foreground application, log onto the server console, then select **Start > Programs > SOS Applications > Start sosdata server** or from a shortcut on your Windows desktop on the server computer. You can modify the startup parameters by editing the **SERVER.PRM** file in the \SOS folder on the server computer. You can use Notepad, EDIT.EXE or any text editor. You can, of course, create a desktop shortcut to match the item in the Windows Start menu.



Starting from the Command Line

Alternatively, open a command prompt window (**Start > Programs > Run**, then type in **cmd** and press <Enter>). Next, type the following to start the database server using the parameters contained in the **\SOS\SERVER.PRM** file. (These commands assume files are located in the default locations. If you installed on a different drive and or directory, make the appropriate changes):

[SOS Releases 2005 - 2009]

```
cd \sos\asa\win32 <enter>
```

```
dbsrv9 @\sos\server.prm \sos\data\sosdata.db <enter>
```

[SOS Release 2010]

```
cd \sos\sa\bin32 <enter>
```

```
dbsrv11 @\sos\server.prm \sos\data\sosdata.db <enter>
```

Note that if running on a 64-bit version of Windows, you can use the 64-bit database engine by using the bin64 directory instead:

```
cd \sos\sa\bin64 <enter>
```

```
dbsrv11 @\sos\server.prm \sos\data\sosdata.db <enter>
```

Running as a Windows Service

You can set the database to start automatically at a set time each day in *service* mode by activating SA Server with Scheduled Tasks, the Windows task scheduler. See the following document on the SOS web site for details:

<http://www.sosoft.com/fod/doc430-startingdbasservice.pdf>

Modifying the Server Startup

There are many additional server parameters that you may want to consider. These are documented in the online Tech Reference (**\SOS\SOSTECH.PDF**). Performance of the database is dependent upon the availability of ample amounts of memory for database-specific *cache*. The database engine automatically adjusts the size of the database cache based on the size of the database files and the amount of available memory on your system. Nevertheless, if you require more than 256 MB of cache, you must specify a **-ch** parameter in the startup file (SERVER.PRM, located in the SOS folder). Large organizations, in which the total size of the database DB files will grow to more than 750 megabytes, should therefore specify:

```
-ch 555m
```

in the SERVER.PRM file, where **555** should be replaced with the number of megabytes that would match about one third or more of the expected maximum size of the database.



Of course, it is still necessary to have enough RAM in the computer to support a database cache of that size!

You should specify a time that the database should automatically shut down each day, so that any scheduled backups will be successful. Add the following line to the `\SOS\SERVER.PRM` file:

`-tg 22:00`

The time is specified in “military” or 24 hour format and the `-tg` switch must be typed in lower case letters. The example above would provide automatic shutdown at 10 PM.

Note *If the database has already been started, shut it down and restart it so that your new parameters will be in effect.*

Caution **It is essential that you shut down the database server program prior to running your backup. While the database server is running, the files containing your data are all “open”. There are no commercial backup programs that can successfully backup open SA files in such a way that they would be usable after being restored!**

Shutting Down the Database Server on Windows Servers

To stop a running database server that is running as a foreground program (regular application), just close the server window as you would any Windows program, or if minimized to a system tray icon, right-click the icon and select **Exit** on the pop-up menu. If you are running the database server as a service, select **Start > Programs > SOS Applications > Shut Down SOSData**, go into Services (from Control Panel > Administrative Tools) and stop the service from there, or go to a command prompt and type **NET STOP** <name you gave the database service, in quotes>.

Starting OM/CM on a Network Workstation

IMPORTANT: You cannot run SOS applications on a workstation unless the database server software is running!

* If you have firewall software running on your computer, it may ask whether the SOS programs should be permitted to run when you launch them. Please indicate “Allow” or the equivalent. If you “Block” these programs, you will not be able to run SOS applications unless you disable or reconfigure your firewall software.

Once the server software is running (see the relevant section above), and you have installed the SOS network client software on your workstation, you can start and run OM or CM just as you would any other application. Select **SOS Login, Office Manager for Windows** or **Case Manager for Windows** on the **Start > Programs > SOS Applications** menu or launch the program from the program icon on your desktop.



You may notice a bit of delay and some differences in what you normally see on the screen as a program loads. There will be a message about connecting to the database, then the SOS password screen will appear. Enter your user ID and Password, then click the icon representing the application that you would like to run.

Starting OM/CM on the Server Computer

Sometimes it is necessary to run an SOS program or utility directly on your Windows server for some short-term purpose. If you need to run OM or CM on the same machine that the SA database server software is running, it is not necessary to install or run the SA client software. The application will connect directly to the server using a “shared memory” or IP connection, just as it would connect to the personal database server in a single computer situation.

SOS does not recommend that the server computer be used as a workstation for typical data entry purposes. Such usage is compromises security and performance.

Logging into the System

Regardless of which menu item or SOS desktop icon you use, the system will open the SOS log-in window, in which you must enter your ID and password, then select the icon representing the module you wish to launch. If you are starting the software for the first time, use the default supervisor ID “SUPER” with the password “SUPER”. The system will immediately request a change of password for security reasons. Please select the password carefully, and do not forget it. The password should start with a letter and may be up to 40 characters long. SOS recommends that you use a “pass phrase” rather than a single password, or that your password contain numbers and punctuation in addition to letters, but you must not use the apostrophe (') or slash (/) characters.

Using the SUPER login, go into the Administration Module (the keys icon), then select **Users & Passwords**. Create one or more accounts as detailed in the **Administrator Guide** (**Start > Programs > SOS Applications > Administrator Guide**).

Uninstalling SOS

To uninstall SOS, use **Start > Settings > Control Panel > Add/Remove Programs**. Note that both the programs and data will be removed. *If you want to keep the data you have entered, you must copy the contents of the \SOS\DATA folder to another location before proceeding!* When the uninstall is complete, you may remove the SOS folder and its contents from your hard disk.