Instructions for Moving AVImark to a New Server

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Important Information

Moving AVImark is simplified by having the old server and the new server on your network together. Once the transition is fully complete, the old server may be removed from the network, if desired. If this is not possible, please call Technical Support for alternate instructions.

Requirements Before Moving AVImark

✓ If you use the Client/Server service of AVImark, steps must be taken prior to moving AVImark. Please call Technical Support at (877) 838-9273 Option 1 for assistance.

✓ If you use the Attachments feature of AVImark, or are uncertain if you do, please call Technical Support at (877) 838-9273 Option 1 for assistance. Failure to do so could result in the inability to retrieve your attachments within AVImark.

✓ If you use Dragonfly and your AVImark server is also acting as your Dragonfly server, please call (877) 838-9273 option 1 sub option 8. If Dragonfly is not located on your AVImark server, it is not necessary to call until after you move AVImark.

✓ If you use the Sync Service on the server computer, steps must be taken prior to moving AVImark. To verify that you are using Sync Service, go to the Services on the server computer and look for AVImark Vetlogic Database Synchronization Service. If it is installed, please call Support at (877) 838-9273 Option 1 for assistance.

✓ If you use **Intelligent Inventory** in conjunction with AVImark, and it is installed on your server, please call Technical Support (877) 838-9273 for assistance.

Requirements After Moving AVImark

✓ If you use **Data Vault,** please call (888) 538-8348 after moving AVImark. Failure to do so will result in your data not being backed up.

✓ If you use **Rapport**, PetWise or eMinders, you must call (877) 838-9273 Option 2 for assistance.

✓ If you use VetRx service with AVImark, steps must be taken prior to moving AVImark. Please call Technical **Support** at (877) 838-9273 Option 1 for assistance.

✓ If you are using **VetEnvoy** for Insurance or **Home Again** integration, steps must be taken prior to moving AVImark. Please call Technical Support at (877) 838-9273 Option 1 for assistance.

✓ If you use **IVLS Bi-Directional** communication with AVImark, please contact our Lab Support department at (877) 838-9273 option 4 sub option 2 or email lab@avimark.net.

✓ If you are using the AVImark **Time Clock** and your server is the Time Server, please call Technical Support (877) 838-9273 for assistance in setting this back up.

✓ If you use **AVImark Payment Solutions** (APS) to process credit cards, please call (877) 838-9273 option 1 sub option 3.

If you use any ancillary product or service in conjunction with AVImark not detailed above, please check with AVImark Support prior to switching servers.

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Please refer to our **Hardware Requirements** document and the **AVImark Recommended Settings** prior to attempting to move AVImark. Both documents are available at https://avimark.net/support/resources/. If you have any questions about your hardware setup or the installation of AVImark, please call (877) 838-9273 option 1 or email support@avimark.net.

Folders Used in Conjunction with AVImark

In addition to the AVImark folder, the program uses other directories: Attachments, Documents, Forms, and Photos, etc. If these directories are located inside the AVImark folder, it simplifies the process of moving AVImark to the new server.

To determine where you have these set in AVImark, go to the Options Maintenance window. To access this window on your CID, locate the **Wrench** icon on the speedbar. Verify the locations of your Documents, Forms, Photos and File Attachments. If you need help locating these or they are not located within the AVImark folder, we recommend you contact Technical Support prior to moving AVImark.

⚠ *In order to assure any attachments you have linked to AVImark are moved correctly, you must know if you ever stored any attachments outside of the AVImark folder. If you are uncertain of this, contact Technical Support at (877) 838-9273 Option 1 for assistance. Failure to do so could result in the inability to retrieve your attachments within AVImark.*

If you currently use, have used, or are uncertain you use file attachments, we recommend you contact Support prior to moving AVImark. This is to ensure all attachments are transferred to your new server. Failure to do so can result in the inability to access some or all attachments within AVImark.

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Setting Up The New Server

When Not Using Client Server

📋 If you have not done so already, verify the location of your Photos, Documents, Forms and Attachments as stated previously.

1. Have AVImark closed on all computers and be at the **new** server.

2. If all of the directories mentioned above (Documents, Photos, Forms, and Attachments) are located inside the AVImark folder, and you have verified you have no attachments stored outside of AVImark, you can simply copy the AVImark folder from the old server to the new server.

   If the directories for Documents, Photos, Forms and Attachments are not located within the AVImark folder, we recommend contacting Technical Support for assistance prior to moving AVImark.

3. Set up sharing on the new server. You will either share just the AVImark folder (if the other directories are inside it) or you will share the entire drive (if the other directories are on the same drive). Set up sharing with full access, allowing other users to change the files.

📋 We recommend sharing just the AVImark folder.

4. Before trying to share the AVImark folder, you should **disable** the Sharing wizard. More information can be found in the Sharing AVImark portion of our **Recommended Settings** document.

5. Make sure that all users log into the new server as either a power user or administrator.

6. Open the AVImark folder on the new server and create a UNC shortcut by right-clicking on AVImark.exe and click **Send to > Desktop (create shortcut)**. Do not map the drive to AVImark. **Right-click | Properties** on the AVImark shortcut and click on the **Shortcut** tab. Click the **Advanced** button and click the option to **Run as Administrator** and click **OK**.

7. Open AVImark from the desktop shortcut and immediately rebuild the Attachment index. If you get any rebuild error messages, do not proceed. Stop and call Technical Support. Failure to do so will result in the inability to access attachments within AVImark. If you do not receive error messages, proceed to the next step.

8. Delete all of the old AVImark shortcuts from all computers.

9. Create new UNC shortcuts on the workstations. Do not map the drive to AVImark. To create a UNC shortcut from a workstation, go through My Network Places and open the AVImark folder on the new server and right-click on AVImark.exe and click **Send to > Desktop (create shortcut)**. Set the shortcut to **Run as Administrator** as specified.

10. Log in as **Administrator** on the new server and open AVImark, if it is not already open. Go to **Help | About AVImark**. If you have a Systems Settings tab, click Correct on the Oplocks and/or Caching messages. Afterwards, you will need to reboot the server for these settings to take effect.

11. Open AVImark on the workstations and make sure you are able to print documents within AVImark. If you receive errors or the document fails to print, please contact Technical Support.

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12. Please visit our website www.avimark.net and click **Support | Support Documents**. Click on **Recommended Settings**. Print and review the document and make the necessary setting corrections for caching, power management, and other settings specific for your operating system.

13. If you're using Data Vault, PetWise, IVLS Bi-Directional, Rapport, and eMinders, or any other integration, please follow the instructions listed under the "Important Information" section on page 3.

When Using Client Server

If you have not done so already, verify the location of your photos, documents and attachments as stated on page 4.

The server computer's information is stored in the AVImark.ini file. When moving the AVImark folder to a new location, you must tell the AVImark.ini file what computer is where the AVImarkServer.exe program is located.

If you need additional assistance setting up client server, call Technical Support at (877) 838-9273 Option 1 for assistance.

Review the Documents

1. Close AVImark on all computers and be at the **old** server.

2. Delete the **AVImark.ini** file from the AVImark folder.

3. Double-click on the **AVImarkGuardian** desktop shortcut.

4. Click **uninstall AVImarkServer** as a **Service** and click **Run.**

5. If all of the directories mentioned on page 4 in the section entitled "Folders used in conjunction with AVImark" (Documents, Photos, Forms, and Attachments) are located inside the AVImark folder, and you have verified you have no attachments stored outside of AVImark, you can simply copy the AVImark folder from the old server to the new server.

   If the directories for Documents, Photos, Forms and Attachments are not located within the AVImark folder, contact Technical Support prior to moving AVImark for assistance.

6. Have AVImark closed on all computers and be at the **new** server.

7. Set up sharing on the new server. You will either share just the AVImark folder (if the other directories are inside it) or you will share the entire drive (if the other directories are on the same drive). You will set up sharing with full access, allowing other users to change the files.

We recommend sharing just the AVImark folder.

8. Before trying to share the AVImark folder, you should **disable** the Sharing wizard. More information can be found in the Sharing AVImark portion of our Recommended Settings document.

9. Make sure that all users are logging into the new server as either a power user or administrator.

10. Open the AVImark folder on the new server and create a UNC shortcut by right-clicking on AVImark.exe and click **Send to > Desktop (create shortcut)**. Do not map the drive to AVImark. **Right-click | Properties** on the AVImark shortcut and click on the **Shortcut** tab. Click the **Advanced** button and click the option to **Run as Administrator** and click **OK**.

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11. You will also need to create a UNC shortcut to the avimarkguardian.exe the same way as shown in Step 10.

12. Double-click the avimarkguardian shortcut on the new server's desktop.

13. The option to Open AVImarkServer should be checked, Click **Run**.

14. In the blue AVImark Server window, click **File | Options** and assign a new port and password. The port can be 9191; typically the password will be 123. Click **OK**.

15. In the AVImarkGuardian window, click I**nstall AVImark Server as a hidden Service** and click **Run**. When the status at the bottom of the window shows that the AVImark server is currently running as a service, close this window.

16. **Right-click | Properties** on the AVImark shortcut. **Right-click | Copy** on the Target path. Click the **Start** menu and **paste** the target path in the search field above the Start button. Click after the last character in the target path and hit the spacebar. Type **/connect**. Your path will look similar to this: c:\avimark\avimark.exe /connect.

17. Choose the option **Connect to Application server on the network or internet**. Click **Next**. Enter the name of the new Server computer then enter the same user-defined password and port that you entered in step 14. Click **OK**.

18. Open AVImark from the desktop shortcut and immediately rebuild the Attachment index. If you get any rebuild error messages, do not proceed. Stop and call Technical Support. Failure to do so may result in the inability to access attachments within AVImark. If you do not get error messages, proceed to the next step.

19. Remove the **/connect** from the Target path.

20. Delete all of the old AVImark shortcuts from all computers.

21. Create new UNC shortcuts on the workstations. Do not map the drive to AVImark. To create a UNC shortcut from a workstation, go through **My Network Places** and open the AVImark folder on the new server and right-click on AVImark.exe and click **Send to > Desktop (create shortcut)**. Set the shortcut to **Run as Administrator** as specified in step 10.

22. Be logged in as an Administrator on the new server and open AVImark. Go to Help | About AVImark. If you have a Systems Settings tab, click Correct on Oplocks and/or Caching messages. Afterwards, you will need to reboot the server for these settings to take effect.

23. Open AVImark on the workstations and make sure you are able to print documents within AVImark. If you receive errors or the document fails to print, please contact Technical Support.

24. Please visit our website **www.avimark.net** and click on **Support | Support Documents**. Locate the **Recommended Settings** document to print and review. Make necessary setting corrections for caching, power management, firewall settings, etc specified for your operating system.

25. If you are using Data Vault, PetWise, IVLS Bi-Directional, Rapport, eMinders, or any other integration, please follow the instructions listed under the "Important Information" section on page 3.

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