

Upgrade CPMS A&D E-form from 3.4.0 -> 4.0.0

The back up is the most important part.

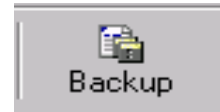
Do not install the new version until you have successfully backed up the data from you old version.

A backup is done from within the CPMS Eform application. Follow these instructions.

(Call Piet Vermeer at 503.945.5960 or Fritz Chlanda at 503.947.1039 if you feel you might need assistance)

Step 1 Open your existing A&D E-form Application and:

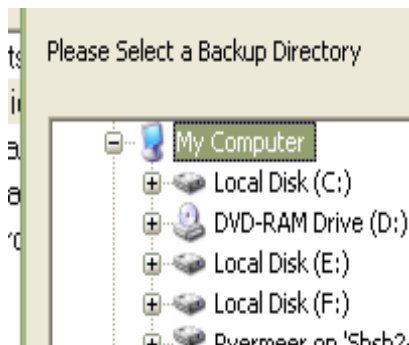
Do a back up



The back up procedure creates 5 MS Excel spreadsheets, named:

eform_enro_bak.xls, eform_expo_bak.xls, eform_head_bak.xls, eform_prov_bak.xls and eform_user_bak.xls.

These files contain all the data that has been entered over time in the E-form. Make a note of where the back up files are stored. You have the opportunity to select this location during the back-up procedure



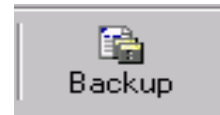
Step 2 Use “Windows Explorer” to verify the existence of the back up files and make sure they contain all the data you entered in the E-form.

Do NOT continue if you are not sure about the data files !!!!

Step 3 **Only if you also have the MH E-form**

Open your existing MH E-form Application and:

Do a back up



The back up procedure creates 5 MS Excel spreadsheets, named:

mheform_client_bak.xls, mheform_exportdates_bak.xls,
mheform_header_bak.xls, mheform_providers_bak.xls and
mheform_user_bak.xls.

Just as a precaution.

Step 4 Download the new version of the CPMS E-form 4.0.0 from the DHS Website.

Step 5 Start the installation procedure

“Welcome to the Eforms Setup program”

A window starting with the above message should pop up

Step 6 Click **Next**,

Select where (browse which pc/server/folder if not the default) the new E-form will be installed

Click **Next**,

Click **Next**,

Step 7 Click **Finish**.

This completes the upgrade from 3.4 to 4.0

The next set of instructions will guide you to restore the data from the back up files into the new version.

Restoring the Backup

1. Launch the E-form from the desktop icon.



2. Login in: Only This time use the following:

User: admin

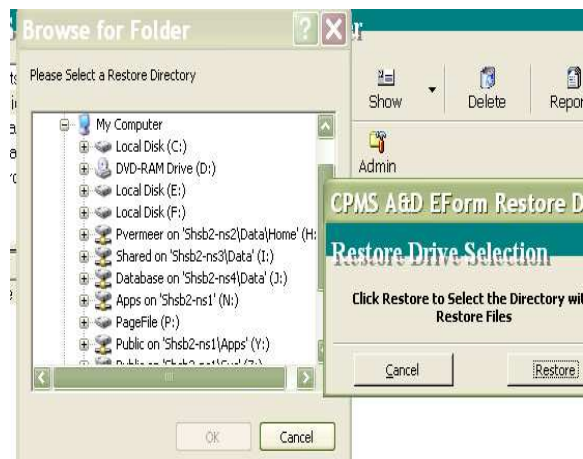
Password: admin



3. From the client center, choose **Restore**.

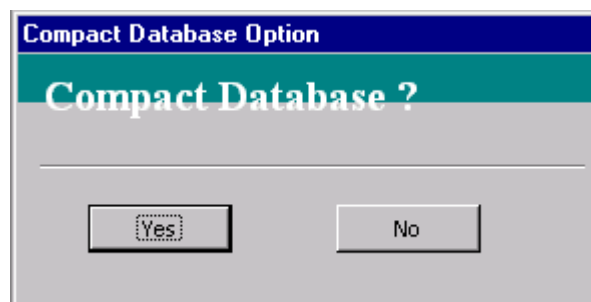


4. Choose the drive to restore from and click **Restore**. When you get the "Data has been restored" message, click **OK**.



5. Choose Logoff.

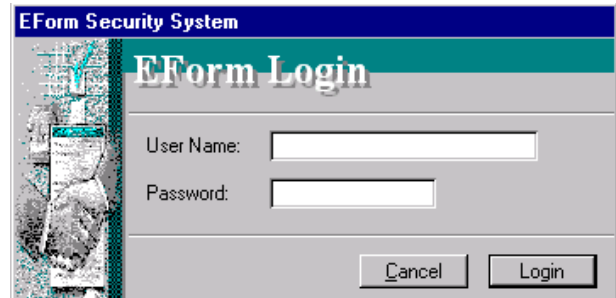
6. Click **Yes** to the Compact Database message. It is a good idea to compact your database on a regular basis (like once a month).



7. Now click on **System** from the title menu, and select Login. This time use your own personal User ID and Password.

That's it!

Now you can get back to work and enter client information!



The screenshot shows a window titled "EForm Security System" with a sub-header "EForm Login". On the left side, there is a vertical strip with a background image of a person's face. The main area contains two input fields: "User Name:" and "Password:". At the bottom right, there are two buttons: "Cancel" and "Login".

**Thank you for using the
CPMS E-form!**