

## LIMS Upgrade Task Checklist

- **1. Install SQL Server Express & SQL Server Management Studio:** First, verify if your organization already uses SQL Server 2014 or newer. If yes, verify that you also have SQL Server Management Studio (SSMS) installed. If not, install SQL Server Express 2019 and SSMS for free by following the links and directions in our [J Street LIMS – Installation Guide](#) accessible on our free Knowledge Base. Recommended links and specific installation instructions can be found in the “System Requirements” and “Installing SQL Server Express” sections. Note that SSMS is included in the installation of SQL Server Express 2019 and most modern versions of SQL Server.
  
- **2. (FOR MSC-LIMS v4 CLIENTS ONLY) Migrate your Access database to SQL Server – Initial Test:** MSC-LIMS v4 stores data in a Microsoft Access .mdb back-end database. MSC-LIMS v5 and J Street LIMS v6 store data in a Microsoft SQL Server database. To preserve your historical data, projects, and other LIMS configurations, it is necessary to migrate your database to SQL Server. This is a highly technical process and must be done accurately. J Street requires **2 database migrations**, an initial “test” migration used to test sampling processes and Excel templates using your own data/settings, and a final migration once you are ready for J Street LIMS to be moved to production (please see context below). MSC-LIMS v4 annual subscribers must choose from the below options to accomplish this and notify J Street:

***IMPORTANT CONTEXT FOR MIGRATION FROM MSC-LIMS v4—Please read before considering options:***

J Street LIMS can be installed side-by-side along with MSC-LIMS. During this testing period, keep your current MSC-LIMS system in production so you can continue to use MSC-LIMS uninterrupted during the upgrade process. J Street can make accommodations for annual subscription clients whose MSC-LIMS is expiring. Any data added to MSC-LIMS after a copy of your database has been created for migration will not be included in the migration. To account for this, **J Street requires 2 database migrations and for the initial test migration to be complete before installing your upgrade.** We have found this is most effective for testing purposes, avoids interruption to your laboratory processes, and eliminates the possibility of having to re-enter data manually into J Street LIMS.

- **Option 1: Hire J Street LIMS Support Team:** A J Street LIMS developer can migrate your database for a flat \$600 fee, which includes both the initial test migration and a final migration of all production data. If this is preferred, zip a copy of your .mdb database and email to J Street, or request a SharePoint link if it’s too large. For Full System License clients with customized systems, an hourly charge will be applied for customization porting in addition to the flat fee. If you have multiple archived Access databases due to the Access file size limit and need additional database migrations, please contact J Street LIMS Support.
- **Option 2: Self Service:** J Street can provide self-service instructions for the database migration. Please download [J Street LIMS – Access-to-SQL Server Database Migration Instructions](#) from the [J Street LIMS Knowledge Base](#). For someone competent with Access & SQL Server, this process can take about 1-2 hours if followed correctly.
  - This option is not available for clients with Full System Licenses to MSC-LIMS v4 who have customized their system. There are additional processes to preserve your customizations which cannot be included in generalized instructions.

**3. Complete the J Street LIMS Pre-Installation Checklist:** This is a separate checklist which verifies the System Requirements have been met and asks questions about your network and LIMS computers. This checklist is for our Support team's reference and must be returned to J Street at least 1 business day prior to scheduling an upgrade installation meeting. A copy of this checklist should have been provided to you in the same email as this upgrade task checklist. If you haven't received it, [contact J Street to be sent a copy.](#) Before proceeding to step 4, please return the completed Pre-Installation Checklist at least 24 hours before meeting with J Street to install the upgrade.

**4. Install J Street LIMS v6 and Restore the SQL Server Database:** Contact Jared ([Jared.Kurth@JStreetTech.com](mailto:Jared.Kurth@JStreetTech.com)) at J Street to schedule an installation meeting where we will provide your upgrade files and assist you through the process over screenshare. Installation meetings typically last 30 minutes to 1 hour and require access to the machine(s) where J Street LIMS v6 will be installed. The most effective course is to install J Street LIMS in a test/sandbox environment and restore your SQL Server database so that you can test your laboratory processes and updated Excel templates using your own data. This also provides more flexibility and time to update and test your Excel templates, described in the following task. For most clients, it will be necessary to update Excel templates before they can use J Street LIMS v6 to the same extent as their previous version. After the sandbox installation is complete, consider how you'll approach the remaining upgrade tasks described below and whether you'd like our team's help.

Note that someone with SysAdmin permissions in SQL Server must be available to drive the installation in order to connect the SQL Server database. Our Support Team will help install the application on up to 2 computers. The installation process on average takes 30 minutes per computer, but we recommend planning for a few hours of downtime just in case.

**5. Custom Excel Template Updates:** This task can be addressed at any point in the upgrade process before moving J Street LIMS into production. Custom Excel import & export templates that have been modified from their original versions will need to be updated. The more a template has been modified from its original default version installed with MSC-LIMS, the more work and longer it will take to update. Not all templates will require updates, and it is not required to update templates you don't use. Note there is added complexity if upgrading from MSC-LIMS v4 due to the SQL Server database component in MSC-LIMS v5 and J Street LIMS v6.

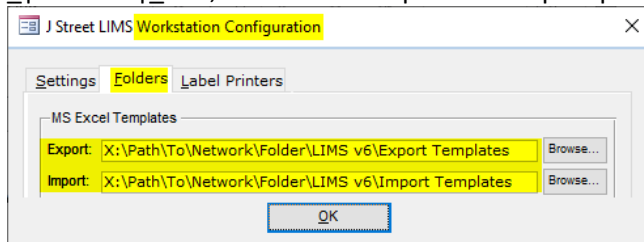
There are two options for updating your templates. Please advise J Street which you prefer:

- **Hire J Street LIMS Support team:** A J Street LIMS developer can update your templates on your behalf at our current template bundle pricing. We offer per-template bundles with discounts for higher volumes of templates. This easy and affordable option streamlines your upgrade process and can maximize efficiency for post-upgrade testing. For pricing information, please see the **Excel Template Update Bundle Price Sheet** on our website's [Knowledge Base](#).
- **Self Service:** J Street can provide self-service instructions for you to make the updates on your own. This task normally requires technical knowledge of LIMS, Excel, and editing VBA Code. The update process can take anywhere from 15 minutes to multiple hours for each template, depending on how heavily they've been customized. Additionally, the exact steps

may vary among templates. Our instructions are intended to provide a general overview of possible changes that MAY be necessary, rather than an exhaustive list that covers every possible scenario. Clients with Full-System Licenses who have customized the LIMS application or database will need additional changes beyond the instructions, in which case please contact J Street to discuss options.

To avoid disruption to your operations during testing, we recommend that you place v6 templates in different folders than your v4 or v5 templates. Follow these steps:

- Create a folder named **\LIMS v6\**
  - *NOTE: For multi-user setups, we recommend this be a shared network folder*
- Create two subfolders in the new **\LIMS v6\** folder named:
  - **Export Templates**
  - **Import Templates**
- Put your v6-compatible Excel templates in these two subfolders
  - *NOTE: Leave the v4/v5 templates where they are to avoid disruptions during testing*
- On each computer with J Street LIMS v6 installed, go to [Admin] > [Workstation Configuration] > **\_ | Folders | \_** tab, then set the Export and Import paths to these new folders:



□ **6. Test J Street LIMS v6:** As alluded to earlier, we recommend testing J Street LIMS v6 before permanently switching from MSC-LIMS v4 or v5, especially if you rely on custom Excel templates. J Street LIMS may be installed side-by-side with MSC-LIMS. Taking this approach allows you time to test your templates in J Street LIMS. If you identify any issues, they can be resolved without impacting business operations.

□ **7. (FOR MSC-LIMS V4 CLIENTS ONLY) Final Migration of Production Data from MSC-LIMS v4 to J Street LIMS v6:** If you test J Street LIMS v6 side by side with MSC-LIMS v4, you will need to perform a final set of steps to ensure that you retain all the data you entered in MSC-LIMS v4 during the testing period. Remember that if you have hired J Street LIMS for database migration services, this final migration is included and you will only need to inform J Street when you're done testing and ready for the final migration. If you elected for self-service database migration, follow the below steps.

For clients who self-serviced their database migration, follow these steps:

1. Stop entering data in MSC-LIMS v4.
2. Re-run the data migration as described in Step 2 above.
3. Spot-check to ensure data added to MSC-LIMS v4 during testing is visible in J Street LIMS v6.
4. Uninstall MSC-LIMS v4.

## Contact Us

**J Street Technology, Inc.**

16625 Redmond Way, Ste. M, PMB 463

Redmond, WA, 98052

(425) 679-6206 (ext. 2 for Support requests)

[Support@JStreetLIMS.com](mailto:Support@JStreetLIMS.com)

[Jared.Kurth@JStreetTech.com](mailto:Jared.Kurth@JStreetTech.com)