



Installing MDsuite

Introduction

This document is intended for those clients who have purchased the MDsuite Application Server software.

It is the responsibility of the client to ensure that:

- All system requirements for servers and workstations that will be running MDsuite are met.
- A supported operating system is installed on all workstations and servers that will be running MDsuite. Refer to the MDsuite System Requirements section for more info.
- Networking is configured correctly and all workstations and servers to be used with MDsuite can communicate with one another.
- A transmission server, if required, meets system requirements and has a supported operating system installed, with a working modem and phone line installed. A transmission server is required when the office is sending claims to any payer or clearinghouse over a point-to-point dialup connection.
- IIS is installed on the application server and on the transmission server. A supported version of Microsoft SQL Server is installed on the application or data server.
- The application server(s) does not have any conflicting software installed on it that could cause problems with MDsuite, such as Microsoft Exchange, Share Point, and any other applications that use IIS.
- The Microsoft .NET Framework 3.5 and Internet Explorer 7.0 or greater is deployed on all workstations that will be using MDsuite.

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MDsuite System Requirements

System requirements are subject to change. For the latest system requirement information, please visit the MDsuite website at http://www.elligence.net/resources/system_requirements.

Deployment Guide

Prerequisites

This section of the guide provides the steps necessary to install the MDsuite Application Server software onto your server. Before proceeding, you will need to ensure the following requirements have been met:

1. Your environment, including all servers and workstations that will be interacting with or implementing MDsuite meet system requirements.
2. You have installed all prerequisite software and followed the processes and procedures outlined in "Preparing Your Server for MDsuite". This document is provided by our Implementations Coordinator and can also be obtained by contacting Data Strategies at 800-875-0480.
3. You know your SQL Server "sa" account password.
4. You know your Data Strategies, Inc. Client ID and a license has been uploaded to our licensing server. Contact Data Strategies at 800-875-0480 for this information.
5. You have obtained the latest version of the MDsuite Application Server Software installation package. You can contact Data Strategies, Inc Technical Support for this software by calling 800-514-3131 or by sending an email to support@mdsuite.com.

Once the above requirements have been met you are ready to proceed with the installation of the MDsuite software.

Software Installation

To install the MDsuite Application Server Software, perform the following steps:

1. Launch the MDsuite Application Server installation package.
2. A welcome screen appears. Click **Next** to begin installation.
3. The **License Agreement** dialog will appear. If you agree to the terms of the license agreement, ensure **I accept the license agreement** is selected and click **Next**. (*Note: If you do not agree to the terms of the license agreement, then you will not be able to install the software.*)
4. The **Installation Prerequisites** dialog appears with information on requirements for the Microsoft .NET Framework. If the **Download** button is grayed out, click **Next**. Otherwise, click the **Download** button to download and install the required Microsoft .NET Framework package. The installer will exit here and you will have to restart it once installation of the Microsoft .NET Framework software is completed.
5. The **Destination Folder** dialog appears, allowing you to specify an alternative location to install the product. MDsuite should be installed on the volume with the most available free space on fixed, non-removable storage of the application server. If the default location is acceptable, click **Next**. Otherwise, click **Browse** and specify an alternative location and then click **Next**.
6. The **Select Installation Type** dialog appears. For the purposes of this guide, ensure the default installation type of **Typical** is selected and click **Next**.
7. The **Ready to Install the Application** dialog appears. Click **Install** to begin initial installation of the software.
8. A **Run Mod?** dialog will appear, asking if you want to modify the databases to the version of MDsuite you're installing. Choose **Yes**. (*Note: Sometimes the dialog appears behind the main installer interface. If it doesn't appear at first, minimize the main installer.*)
9. The **Define Database Server** dialog appears. Specify the network name of the server on your network that is running Microsoft SQL Server. If the SQL Server is the same machine you're installing the

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- application on, then specify the local computer's network name. In the event you are using a named instance, specify the network name, a backslash, and the name of the instance and click **OK**.
10. The **Login to SQL Server** dialog appears. In the **User Name** field specify **sa**. In the **Password** field, provide the password for the SQL Server SA account. Click **OK**.
 11. A dialog will appear asking you if you bill to a set of particular destinations. If you are not in the states listed or do not bill those payers directly, click **No**. Otherwise, click **Yes** and provide the service account information you configured in the guide "Preparing Your Server for MDsuite."
 12. The **Use ellipedia?** dialog will appear. If your application server will have internet access available, it is recommended that you choose **Yes** to use the online help system. Otherwise, if your server will not have access, click **No**.
 13. A dialog will appear stating the installation has completed successfully. Click **Finish** to close the installer.

If you received any errors during installation or were unable to complete the installation as specified above, contact our Technical Support department at 800-514-3131. Support is available between 6am and 5pm Pacific Standard Time.

Workstation Installation

Any workstation computers that will be accessing the MDsuite Application Server will need to have the MDsuite Workstation installed on them. Since the MDsuite Application Server software functions with IIS, deployment of the client to all workstations is done through a web browser.

1. Open Internet Explorer and point your browser to <http://appserveraddress/elligence/clientdl/clientfull.exe> where *appserveraddress* is the network name or IP address of your application server.
2. Click **Run** when prompted by Internet Explorer. The file will download to the workstation and the installation will launch.
3. The Welcome dialog will appear. Click **Next** to begin installing the software.
4. The **Installation Prerequisites** dialog appears with information regarding the Microsoft .NET Framework. If you already have the Microsoft .NET Framework installed, the download button will be grayed out. Click **Next**. If the **Download** button is active, then you do not have the appropriate version of the framework installed. Click **Download** to begin downloading the version. The MDsuite Workstation installer will exit and a download of the framework should begin. Once installation of the framework is completed, restart the workstation component by starting at Step 1 again.
5. You will be prompted to provide an installation path for the workstation. You can change the default location by clicking **Browse**. However it's advised to leave the default location set. Click **Next**.
6. Click the **Install** button when the **Ready to Install the Application** dialog appears.
7. The installer will copy the required files and create the program group under the **Start** menu and place an icon on the desktop.
8. Launch the workstation software from the program group in the **Start** menu or from the desktop icon. Provide an operator and password. First time users will need to use the Microsoft SQL Server "sa" account and password. Ensure the **Application Server** field contains the name or IP address of the new application server.

Workstation installation is now complete and operators can log in by providing their operator name and password.

Deploying the License

MDsuite licensing is handled entirely online, using a unique four digit Client Identifier to distribute licenses from a central license distribution center . You will need to have this identifier and have contacted Data Strategies, Inc at 800-875-0480 to ensure you're electronic license has been uploaded to the license distribution center. If you are installing for the first time, or are deploying a transmission server or another

application server into an environment with an existing application server, you will need your Client Identifier and your license uploaded once for each application server.

To deploy the license, you will need to be on a computer with the MDsuite workstation component installed and perform the following steps:

1. Launch the MDsuite Workstation software.
2. Provide the Microsoft SQL Server SA account credentials in the **Operator:** and **Password:** fields. Provide the network name or IP address of the application server in the **Application Server** field. Click the green checkmark button to login.
3. You will be presented with a **Choose a Database:** prompt. Select **MedicalDemo** from the list and click the green checkmark button to open that database.
4. The workstation will enter a brief initialization period and then show the **Practice Overview** page. From the top menu, click the **Admin** button and then select **Licensing Manager**.
5. The licensing manager appears. Click the **Update** button at the bottom left of the screen. A dialog will appear asking you to provide your Client Identifier. Enter the four digit number and click **OK**.
6. Your license will be downloaded from the central license distribution center and installed.
7. Close the **Licensing Manager** by clicking the **Close** button.
8. Exit the MDsuite Workstation software.

Installing an Additional Application Server or Transmission Server

Installation of an additional application server or transmission server into environment with an existing MDsuite database and application server is essentially the same as a first time installation of MDsuite.

1. Launch the MDsuite Application Server installation package.
2. A welcome screen appears. Click **Next** to begin installation.
3. The **License Agreement** dialog will appear. If you agree to the terms of the license agreement, ensure **I accept the license agreement** is selected and click **Next**. (*Note: If you do not agree to the terms of the license agreement, then you will not be able to install the software.*)
4. The **Installation Prerequisites** dialog appears with information on requirements for the Microsoft .NET Framework. If the **Download** button is grayed out, click **Next**. Otherwise, click the **Download** button to download and install the required Microsoft .NET Framework package. The installer will exit here and you will have to restart it once installation of the Microsoft .NET Framework software is completed.
5. The **Destination Folder** dialog appears, allowing you to specify an alternative location to install the product. MDsuite should be installed on the volume with the most available free space on fixed, non-removable storage of the application server. If the default location is acceptable, click **Next**. Otherwise, click **Browse** and specify an alternative location and then click **Next**.
6. The **Select Installation Type** dialog appears. For the purposes of this guide, ensure the default installation type of **Typical** is selected and click **Next**.
7. The **Ready to Install the Application** dialog appears. Click **Install** to begin initial installation of the software.
8. A **Run Mod?** dialog will appear, asking if you want to modify the databases to the version of MDsuite you're installing. Choose **Yes**. (*Note: Sometimes the dialog appears behind the main installer interface. If it doesn't appear at first, minimize the main installer.*)
9. The **Define Database Server** dialog appears. Specify the network name of the server on your network that is running Microsoft SQL Server. In the event you are using a named instance, specify the network name, a backslash, and the name of the instance. Click **OK**. (e.g. SERVERNAME\INSTANCENAME)
10. The **Login to SQL Server** dialog appears. In the **User Name** field specify **sa**. In the **Password** field, provide the password for the SQL Server SA account. Click **OK**.
11. A dialog will appear asking you if you bill to a set of particular destinations. If you are not in the states listed or do not bill those payers directly, click **No**. Otherwise, click **Yes** and provide the service account information you configured in the guide "Preparing Your Server for MDsuite."
12. The **Use ellipedia?** dialog will appear. If your application server will have internet access available, it is recommended that you choose **Yes** to use the online help system. Otherwise, if your server will not have access, click **No**.

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13. You will be prompted to specify which server acts as the primary Application Server for HL7 processing. In a multi-server MDsuite implementation, only one application server will handle HL7 interface processing and is usually the first server you installed. Enter the network name of that server and click **OK**.
 14. In situations where a transmission server is being installed onto a workstation, you will be asked to provide the network name of the transmission server. Enter the network name of the workstation (do not use "localhost" or "local" or the IP address) that will be the transmission server and click **OK**.
 15. A dialog will appear stating the installation has completed successfully. Click **Finish** to close the installer.

If you received any errors during installation or were unable to complete the installation as specified above, contact our Technical Support department at 800-514-3131. Support is available between 6am and 5pm Pacific Standard Time. If you did not receive any errors, then move forward with the license deployment on the new server.

Creating an MDsuite Administrator Operator

This is a brief overview of how to define an MDsuite Administrator operator so that you do not have to use the SQL Server SA account to administer the software. More in depth information on all of the additional operator settings can be found in the online help section by pressing **F1** from the **Security Manager** interface. If you have purchased or will otherwise be taking advantage of the product training provided by Data Strategies, Inc. for MDsuite, then your assigned Product Specialist will be able to provide you with more in-depth information on each setting in the **Security Manager** Interface.

Data Strategies, Inc strongly recommends that you do not set up every operator account as an administrator in MDsuite. Operators with this level of permissions have complete and unrestricted access to the software and can make changes to areas that you may not want that operator to have access to, including software settings and the ability to add, change, and remove other operators.

To define an office administrator account, you will need to be on a computer with the MDsuite Workstation Software installed on it.

1. Launch the MDsuite Workstation software.
2. Provide the Microsoft SQL Server SA account credentials in the **Operator:** and **Password:** fields. Provide the network name or IP address of the application server in the **Application Server** field. Click the green checkmark button to login.
3. You will be presented with a **Choose a Database:** prompt. Select **MedicalDemo** from the list and click the green checkmark button to open that database.
4. The workstation will enter a brief initialization period and then show the **Practice Overview** page. From the top menu, click the **Admin** button and then select **Security Manager**.
5. The **Security Manager** interface loads. In **Section 1: General** provide the desired operator name in the **Operator Field**. Enter the desired password into the **Password** field and again in the **Confirm Password** field.
6. In **Section 3: Security**, change the operator type to **Administrator**.
7. Click **Save**. The password field contents will disappear and the operator name will turn grey, indicating that the operator has been saved.

You have successfully created an MDsuite Administrator user account.

Conclusion

This concludes the product installation guide. If you have any additional questions, please contact Data Strategies, Inc. Technical Support, available from 6am to 5pm PST, or Training, and Implementations, available from 8am to 5pm PST, for assistance.

Post Deployment

Once the entire deployment process has been completed and the new infrastructure is online, you should review this section for further information on backup, remote access, and other areas of interest.

Remote Access

Clients upgrading their application server may be interested in remote access to their MDsuite software from home and abroad. There are many ways in which to accomplish this but the two most effective ways to setup remote access is to either:

1. Use Routing and Remote Access for VPN setup.
2. Use a separate, dedicated Terminal Server for Remote Desktop services.

While we recommend either of these two methods, it is entirely up to the client to implement remote access, regardless of which medium is chosen. Whichever medium is chosen must provide sufficient security and encryption to satisfy HIPAA regulations.

Backing Up Data

Backing up mission critical data is important to the success of any practice or billing service. There are many different ways that data can be backed up, from tape and optical storage to online services. Some recommendations are:

1. An enterprise backup software package used in conjunction with a DLT, Travan, Ultrium LTO tape drive or other form of removable media.
2. Backing up data to optical media such as blank CDs or DVDs.
3. Utilizing an online backup service for continuous backup protection.

While we recommend these options, it is entirely up to the client to implement any backup solution. DSI cannot provide support for third party backup solutions, regardless of which method is used. Refer to the third party software or service vendor for information and support and information.

Regardless of which solution you choose to back up data, you must ensure the following items are backed up:

- All MDsuite databases in SQL Server.
- The application installation directory (default: C:\Program Files\DSI\MDsuite Application Server)
- The Document Storage Folder (default (C:\DSI\DSF)

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