



INSTALLATION GUIDE
FOR
SPECIALIST PRACTICE MANAGER

using a
MICROSOFT SQL SERVER DATABASE

Updated October 2009

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Contents

Introduction	4
Run the Installation	4
Type of Install	5
Select Type of System	6
Program Manager Group	7
Desktop Group	7
Destination Directory	8
SQL Server to be Accessed by this Workstation	9
Select Path for Storing Log Files	9
Update Path	10
Create a New Data Source to SQL Server (SPM)	11
SQL Server Authentication	11
Select Database	12
Create a New Data Source to SQL Server (SPMWork)	14
SQL Server Authentication	14
Select Database	15
Install Release 242.7b	17
Day Code	18
Connecting to SPM using a SQL Database	19
Desktop	22
Update Program Files	22
ODBC - Linking to Data Sources	23
Microsoft SQL Server database	23
Printers	26
Scanners	27
Running on Terminal Server or Citrix	28
Data replication for offsite use	28
Sending faxes	28
Sending or receiving electronic files	28

Introduction

This Instruction Guide is intended for technicians that are installing SPM on behalf of Incisive Software's clients.

On computers where NT, Windows 2000, Windows XP Pro, Windows Server 2003, Windows Server 2008 or Vista is installed, you must have Administrator rights in order for the System Registry to be updated.

Run the Installation

You will either have received a CD or you will have downloaded the SetupNZ.exe or SetupAuz.exe file (depending where you are) from the www.incisive.co.nz/install website and saved it to the c: drive. Go to Start – Run and type in the location to run the SetupNZ.exe or SetupAuz.exe file, this will be either from the CD or from the location you saved it to on the c: drive



The Installation Wizard will initialise and then the Welcome screen will display.

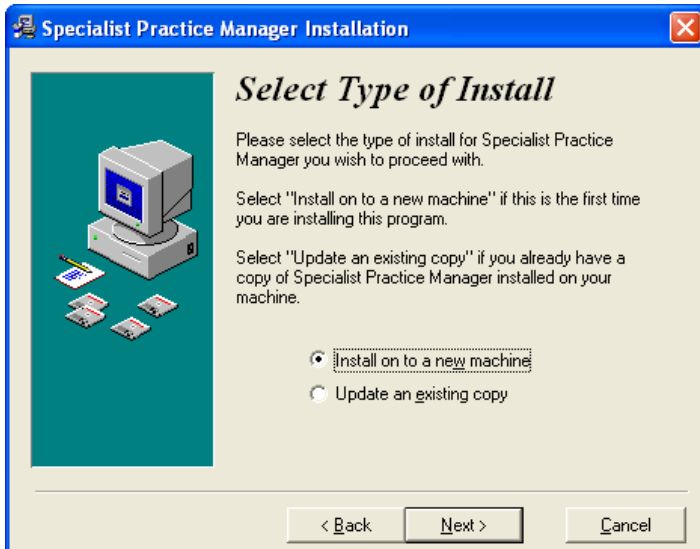


There are few checks you need to do here, make sure that the Regional settings are correct especially that the date and date format, these should be set to English (Australia) or English (NZ) depending where you are. If you are installing on to a Vista computer, then you will need to Control Panel – User Accounts and Turn User Account Control Off.before doing the install.

If everything is correct select *Next*.

Type of Install

Select the type on Installation you are performing:



If you are installing SPM for the first time, select *Install on to a new machine*.

If SPM has already been installed on your computer, select *Update an existing copy*.

If you select *Install on to a new machine* and SPM is already installed on that machine the following message will come up, press *Back* to reselect *Update an existing copy* or press *Cancel* to exit out of the setup.



Select Type of System

If it is a SQL Server Database at the site you are setting up then at the point of *Select Type of System* you should have ticked *Uses SQL Database*

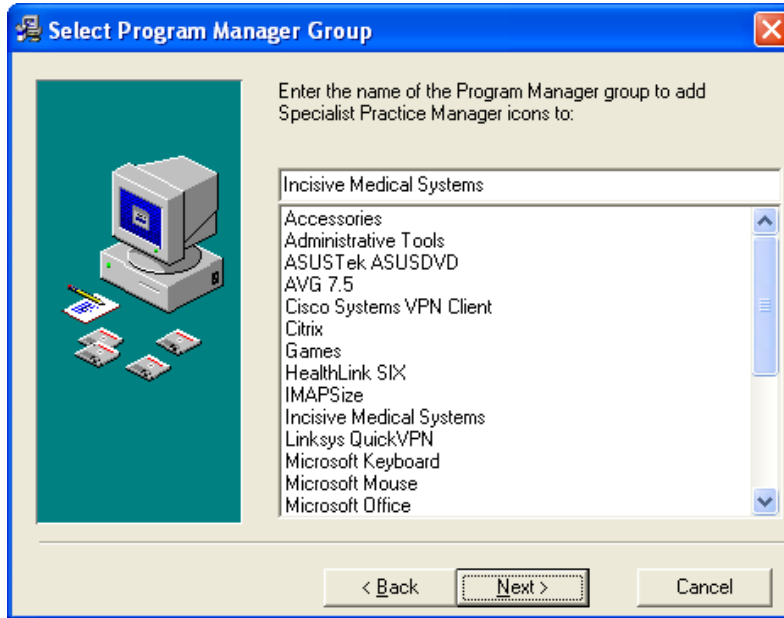


- Select **Stand-alone** if you are installing SPM on a computer that is not connected to a network.
- Select **Server** if you are installing the software on the Server itself. **Note** this does not install the application, only the data directories and supporting files.
- Select **Workstation** if you are installing SPM on a workstation or a Laptop where it is SQL Database, running on a network where the database will reside on the server.
- Select **Laptop**, if the workstation is a laptop (but not a Stand-alone computer) and it is an Access not SQL Server database. This will enable you to copy the data to the laptop for read only purposes away from the rooms, but this is only available for Access Databases.

Program Manager Group

Select the name of the Program Manager group to add the Specialist Practice Manager icon to. The installation will default to Incisive Medical Systems.

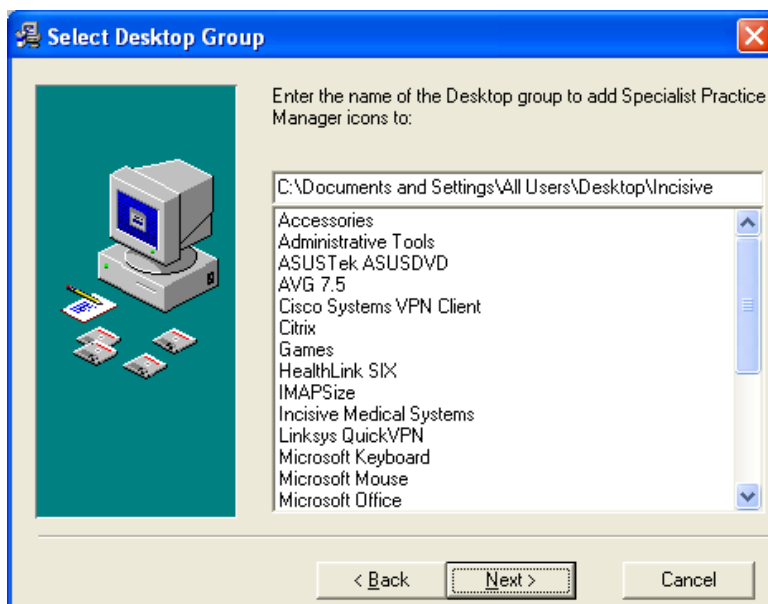
Select *Next*.



Desktop Group

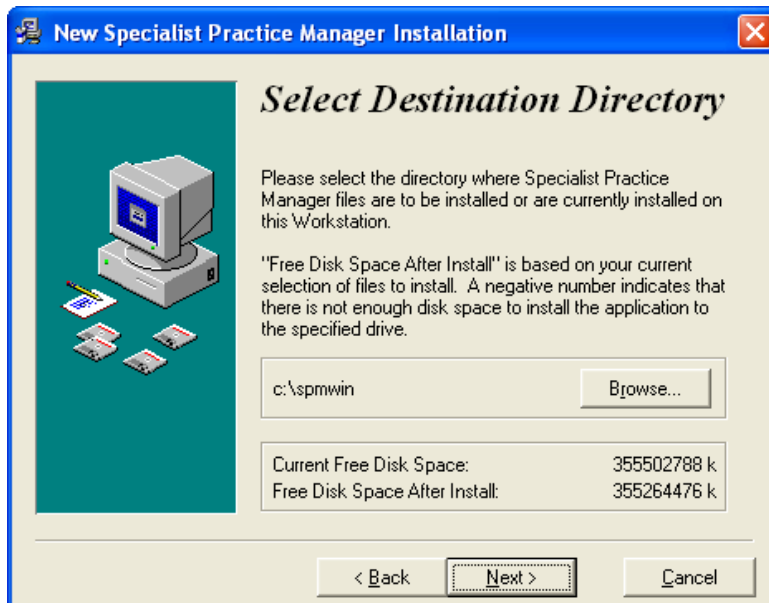
Enter the name of the Desktop Group to add Specialist Practice Manager icons to. This will default to c:\Documents and Settings\All Users\Desktop\Incisive.

Select *Next*.



Destination Directory

Select the Destination Directory where the program files are to be installed.



- The default drive is C:\
- The default directory is SPMWIN.

Depending on the amount of hard disk space available, SPM would normally be installed to drive C, however where hard disks have been partitioned, more space may be available on another drive, ie D:

Regardless of the drive chosen, the program files should still be installed to a directory called \SPMWIN.

To change the default location select *Browse*, otherwise select *Next*.

SQL Server to be Accessed by this Workstation

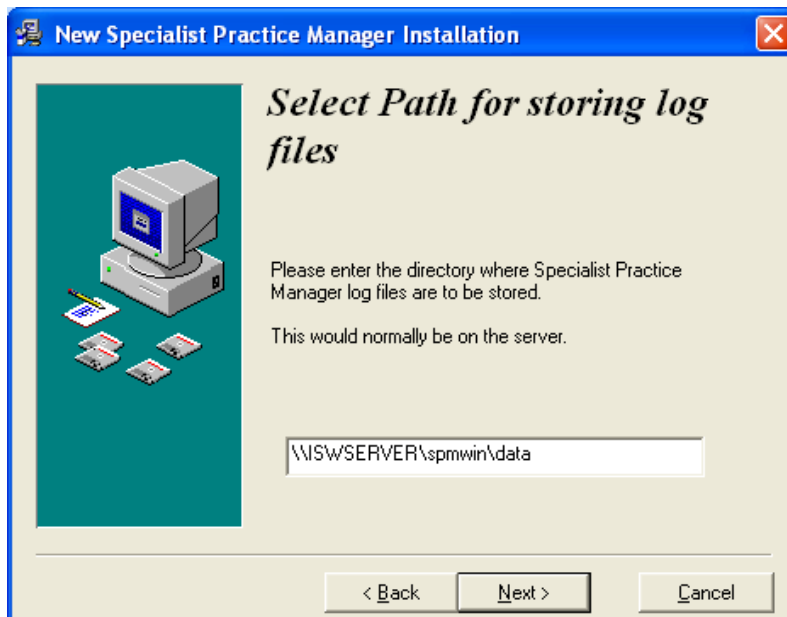
Type in the name of the SQL Server where the databases are located.

Select *Next*.



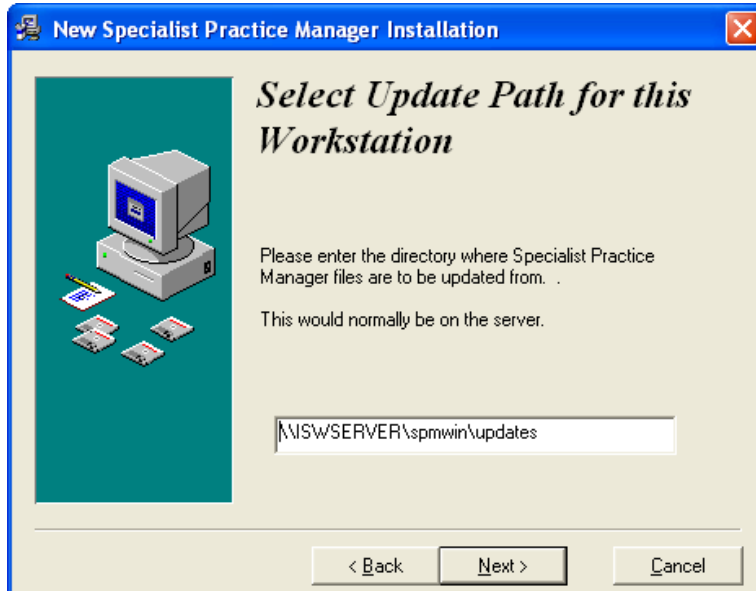
Select Path for Storing Log Files

Type in the path for storing the log files, all workstations should be pointing to the same folder here. If you are looking at a Workstation Setup Report from an existing computer this path will be set to the MDB path, please do not just accept the default check that it is correct.



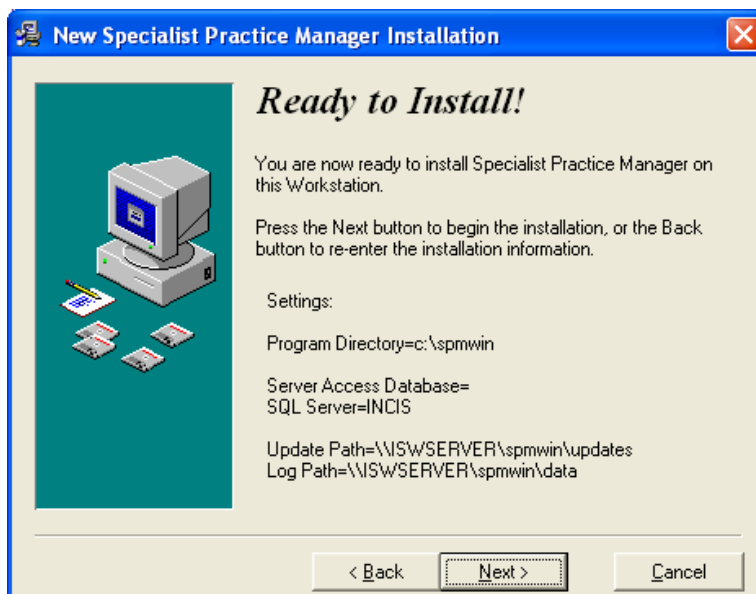
Update Path

If you are installing for a workstation or laptop, the installation routine will attempt to determine the path for the updates. In some instances you will need to alter this. The default directory is on the server in the spmwin\Updates folder. Depending on how your server has been set up, you may need to specify a drive letter.



Alter the path if necessary,

Select *Next*

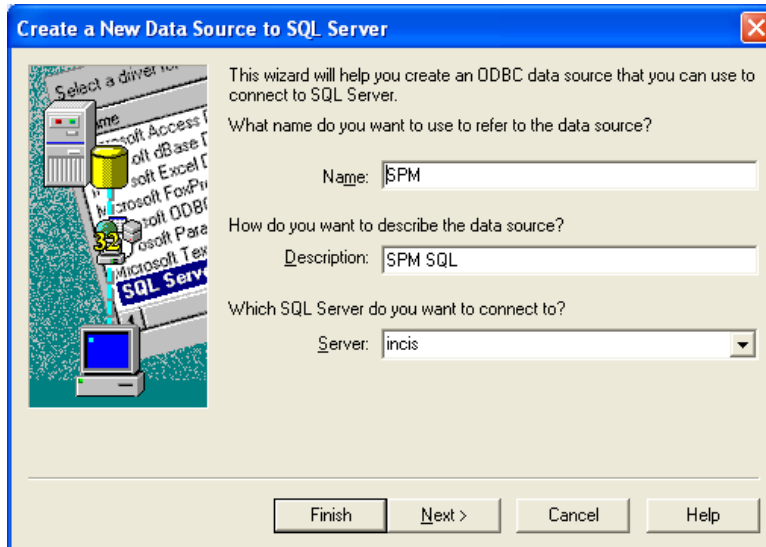


Select *Next*

Create a New Data Source to SQL Server (SPM)

Enter the name of the ODBC Data source to Connect to SQL Server, this is usually SPM or SPMSQL, enter the description and select the Server.

Select *Next*.



Create a New Data Source to SQL Server

This wizard will help you create an ODBC data source that you can use to connect to SQL Server.

What name do you want to use to refer to the data source?

Name: SPM

How do you want to describe the data source?

Description: SPM SQL

Which SQL Server do you want to connect to?

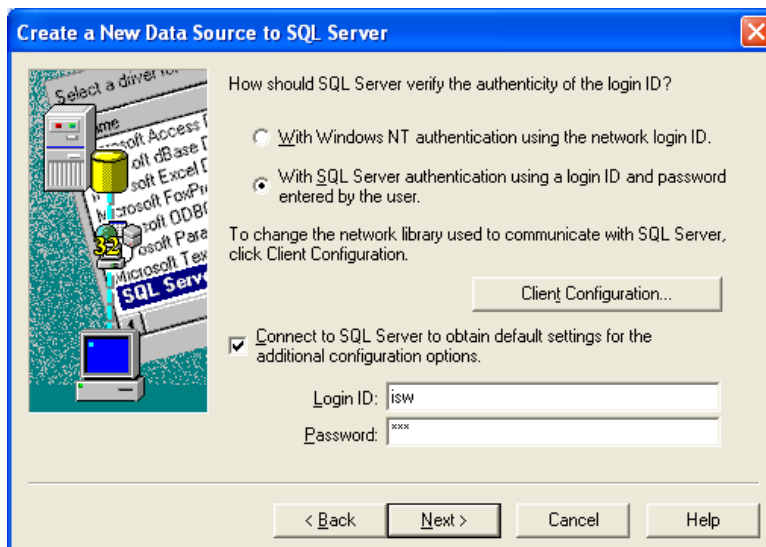
Server: incis

Finish Next > Cancel Help

SQL Server Authentication

This must be set to SQL Server Authentication. Tick the connect to SQL to obtain default settings for the additional configuration options and enter the Login ID and Password.

Select *Next*.



Create a New Data Source to SQL Server

How should SQL Server verify the authenticity of the login ID?

With Windows NT authentication using the network login ID.

With SQL Server authentication using a login ID and password entered by the user.

To change the network library used to communicate with SQL Server, click Client Configuration.

Client Configuration...

Connect to SQL Server to obtain default settings for the additional configuration options.

Login ID: isw

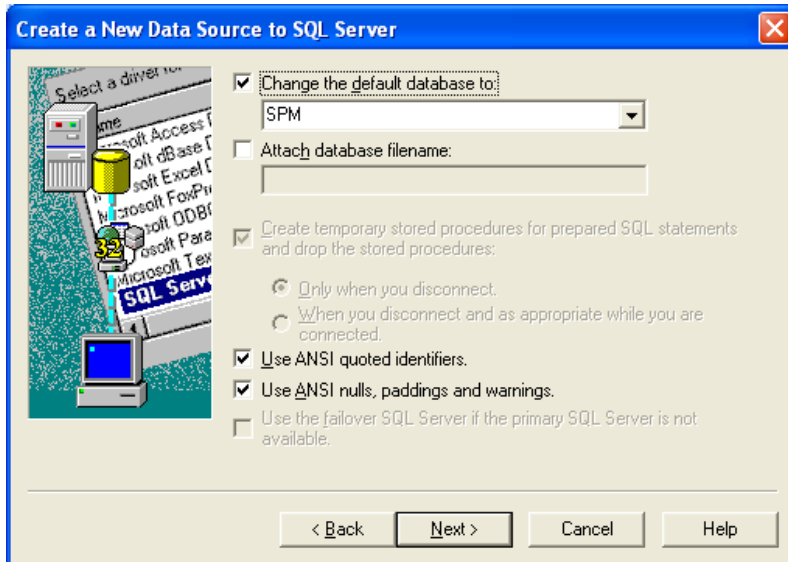
Password: xxxx

< Back Next > Cancel Help

Select Database

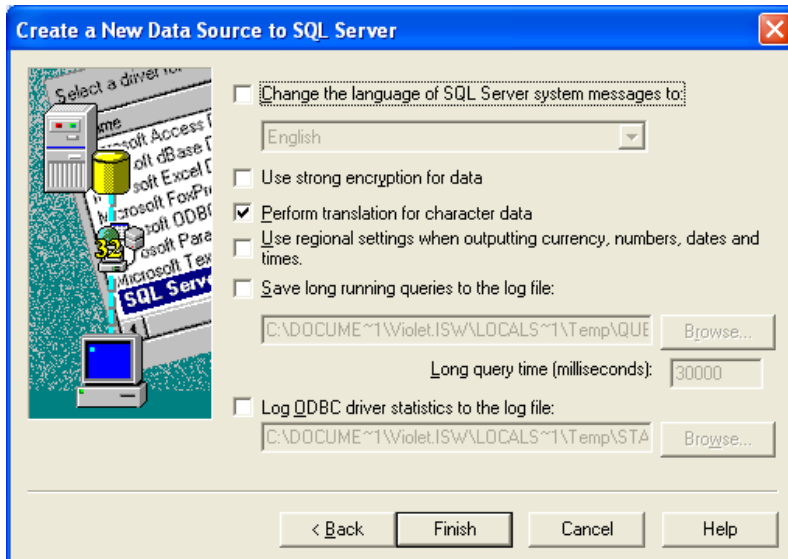
Make sure that the SPM database is selected under Change the default database to: and accept the defaults for everything else.

Select *Next*.



Accept the defaults for this screen.

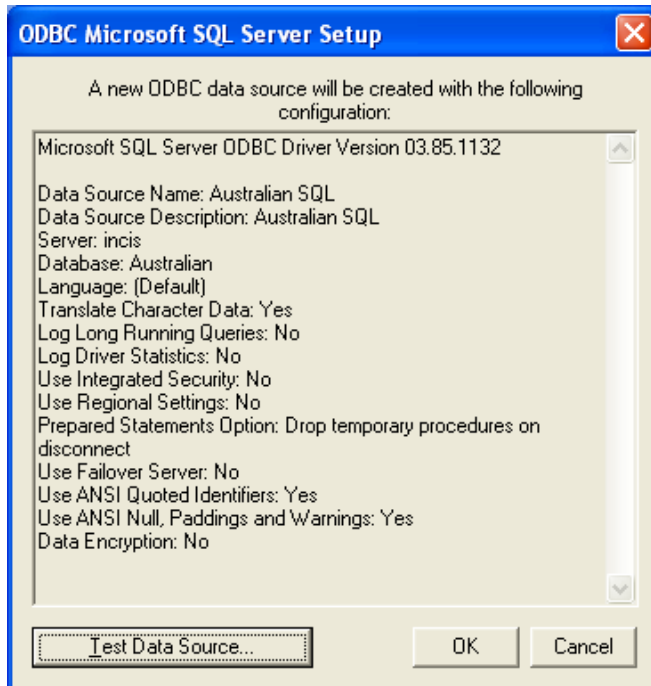
Select *Next*.



Test Connection

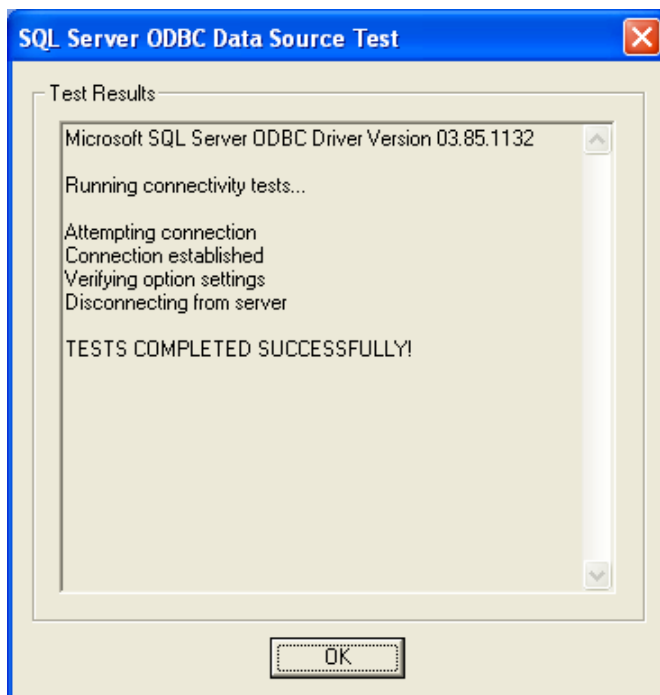
The following screen will come up with the details of the setup.

Select *Test Data Source*



The following screen should appear, with hopefully the message TESTS COMPLETED SUCCESSFULLY!

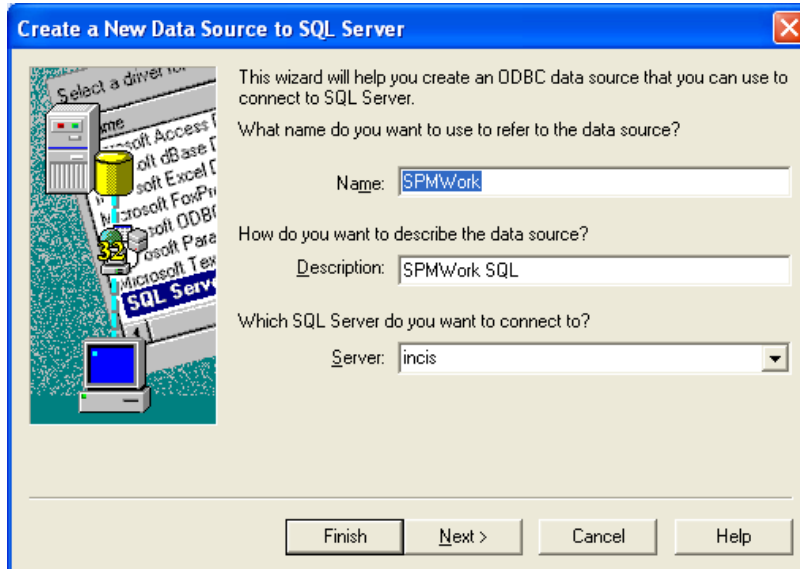
Select *OK*



Create a New Data Source to SQL Server (SPMWork)

Enter the name of the ODBC Data source to Connect to SQL Server, this is usually SPMWork or SPMWorkSQL, enter the description and select the Server.

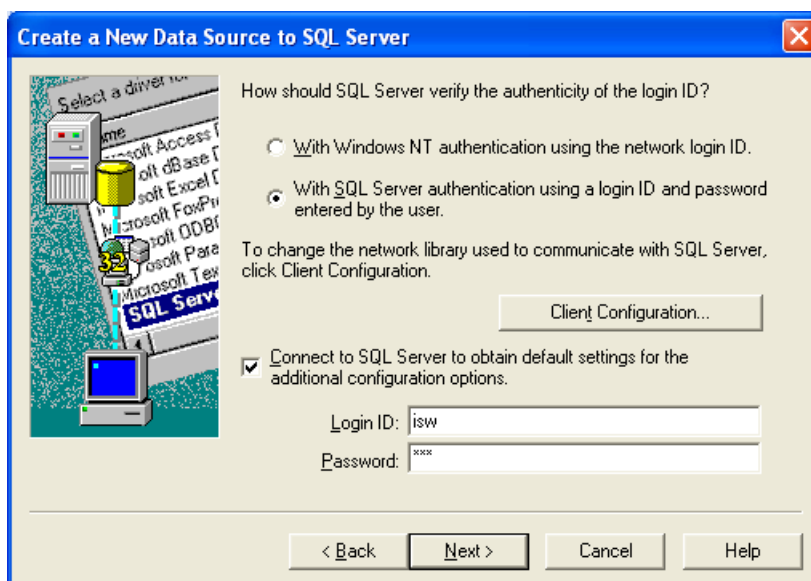
Select *Next*.



SQL Server Authentication

This must be set to SQL Server Authentication. Tick the connect to SQL to obtain default settings for the additional configuration options and enter the Login ID and Password.

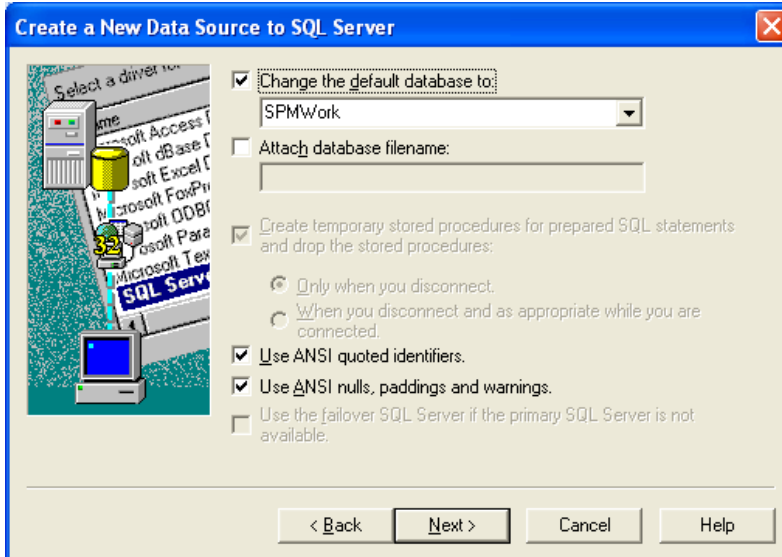
Select *Next*.



Select Database

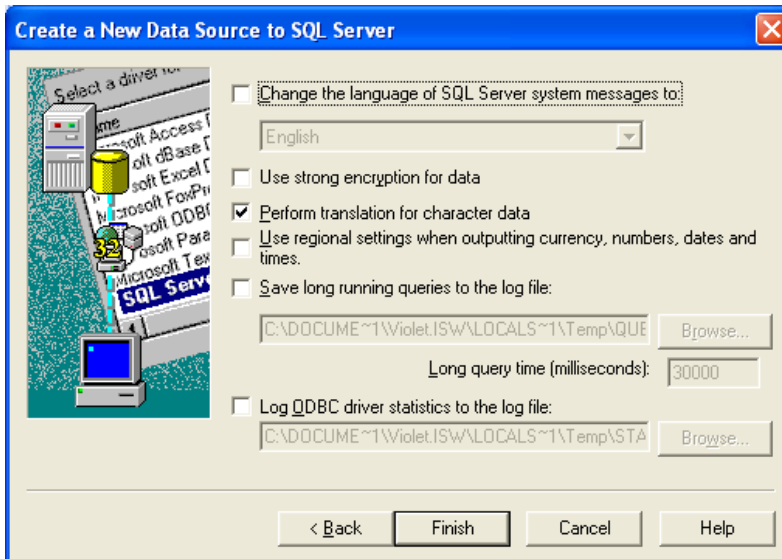
Make sure that the SPM database is selected under Change the default database to: and accept the defaults for everything else.

Select *Next*.



Accept the defaults for this screen.

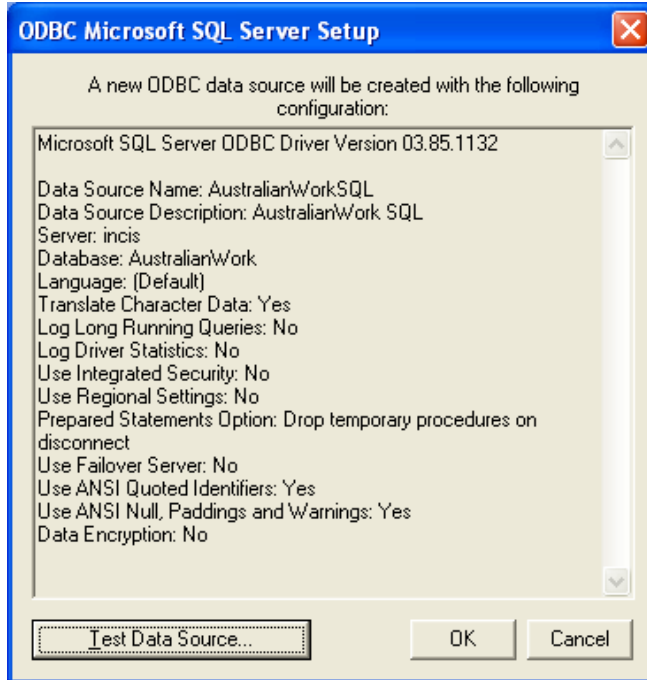
Select *Next*.



Test Connection

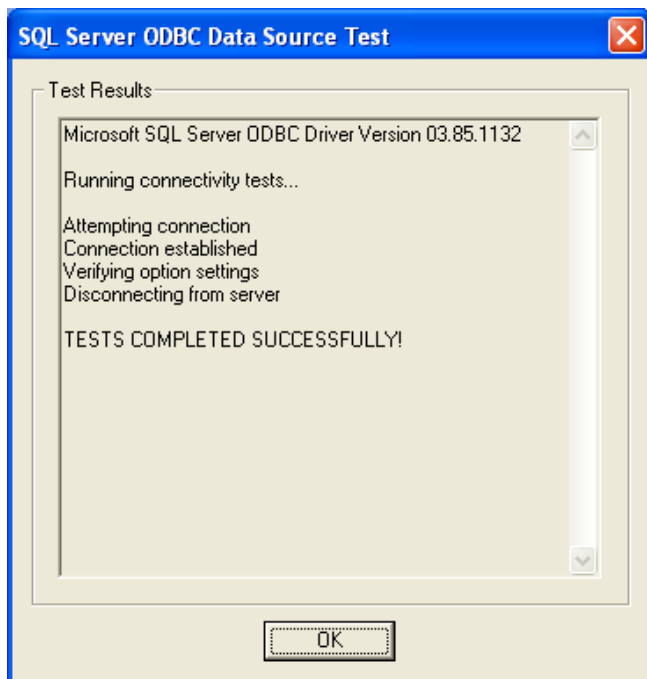
The following screen will come up with the details of the setup.

Select *Test Data Source*

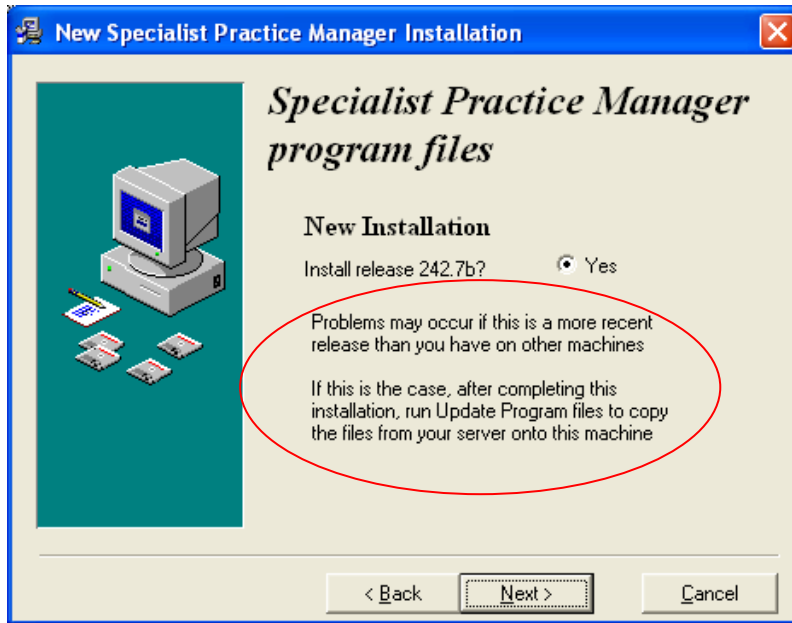


The following screen should appear, with hopefully the message TESTS COMPLETED SUCCESSFULLY!

Select *OK*



Install Release 242.7b



Click Yes to install the Release.

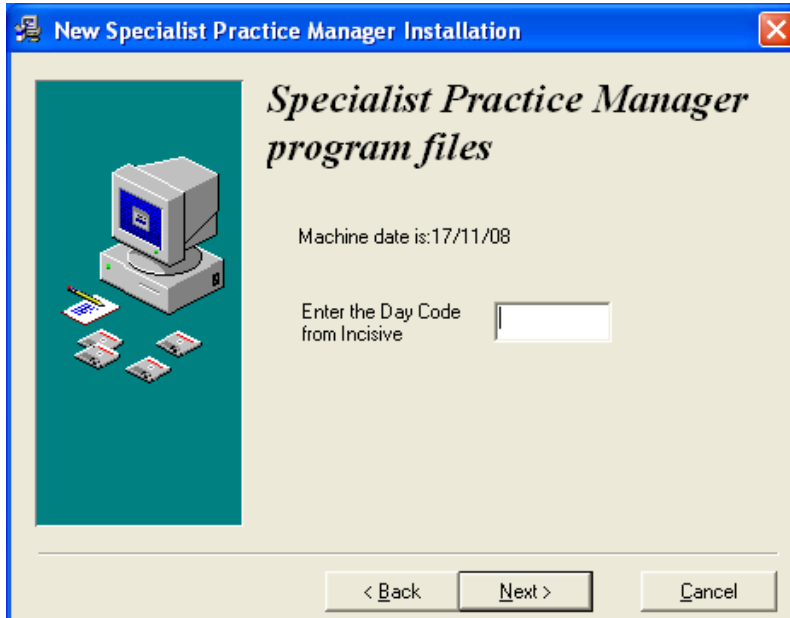
Select Next.

Please note that if this is not the same version you are about to install once you have completed the installation you will need to run **Update Program Files**, this can be found on the incisive folder on the desktop. This will copy the current version to this workstation to ensure it is on the correct version for this site. **At no point** should you rename the SPMWIN folder and copy it across from an old or existing workstation.

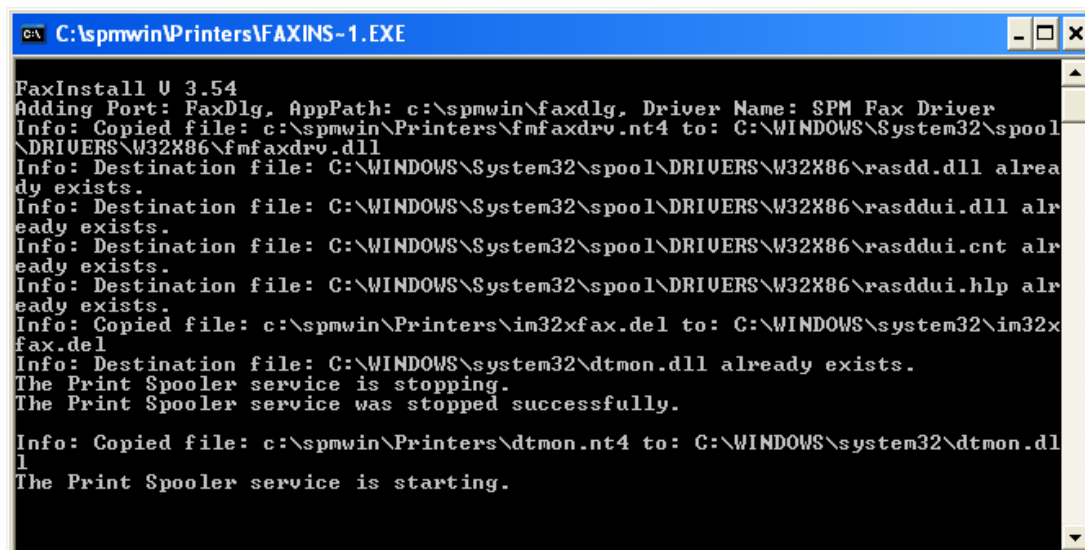
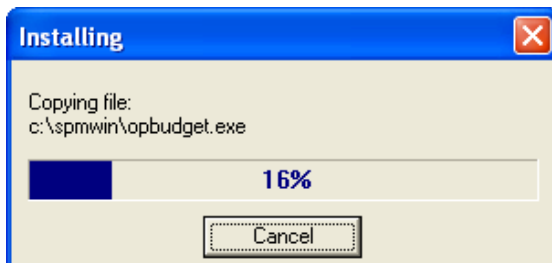
The installation routine will begin copying files.

Day Code

Call Incisive for today's code. Proceeding without the Day-code will not install the application.



Once the Day-code is entered a progress bar displays.



Depending upon the configuration of your computer you may be prompted to install the MDAC file library or the Java run-time library. The necessary files are included in the installation file and the process should be straight forward.

The Installation is now completed.

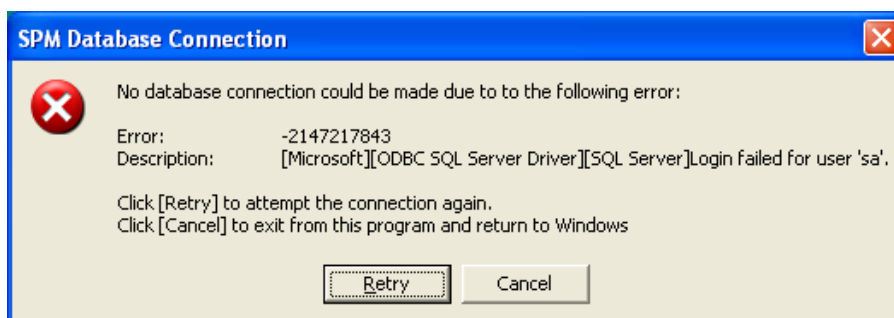


Select Finish.

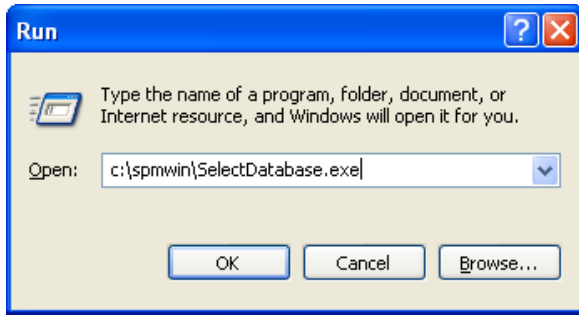
If prompted to restart your computer, do so.

Connecting to SPM using a SQL Database

If after running the Setup you try to log on to Special Practice Manager and you get the following error.

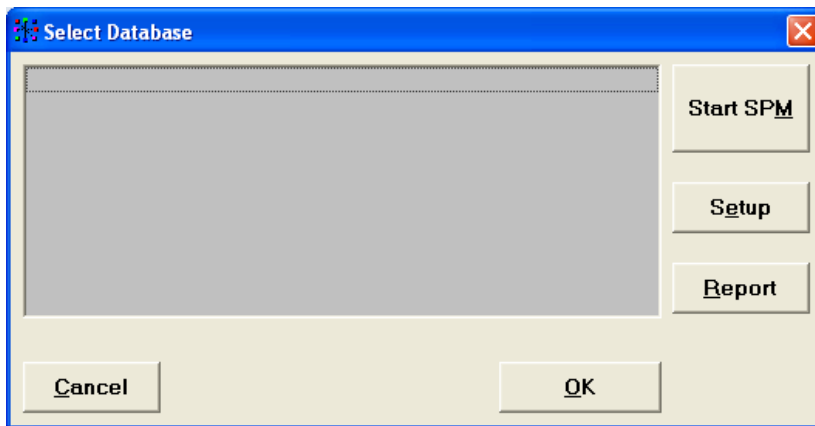


Then go to *Start – Run* and type in `c:\spmwin>SelectDatabase.exe` and press *OK*.



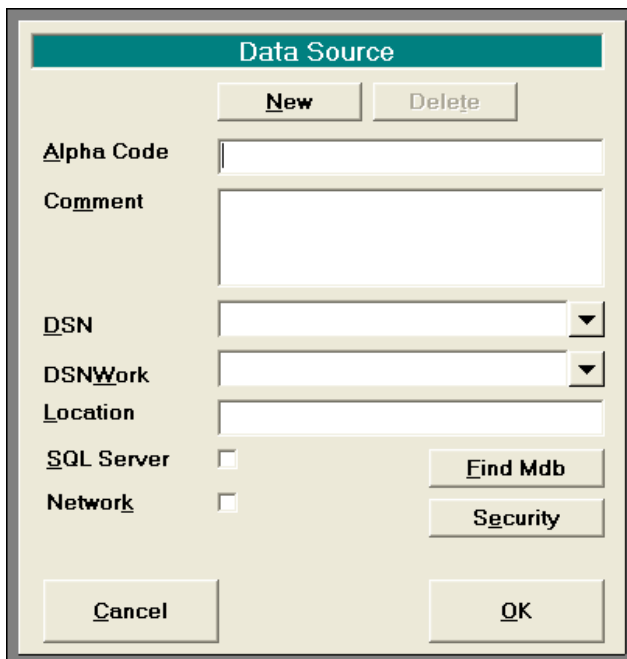
This will bring *Select Database* Window up.

If there is an entry there already select that entry and press *Setup*, if there are no entries there then just select *Setup*.



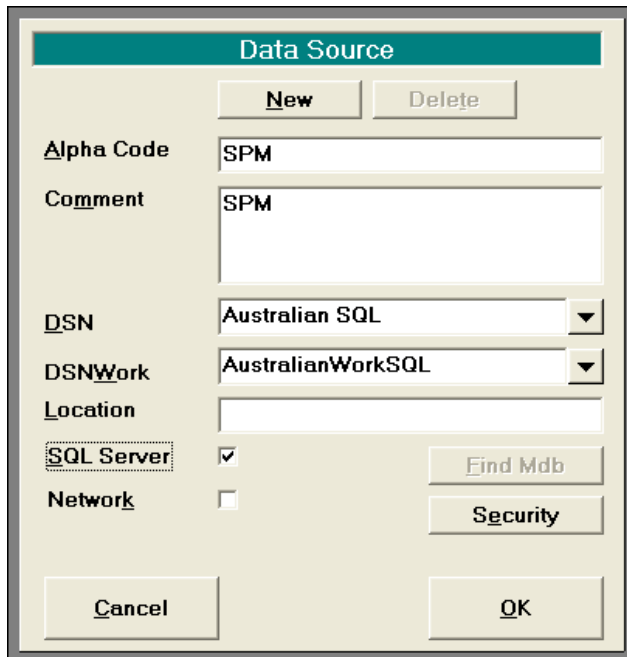
The following screen will appear. If it is an existing entry make sure that the correct DSN and DSNWork has been select, then make sure that the SQL Server has been ticked and then press Security button.

Else select *New*.



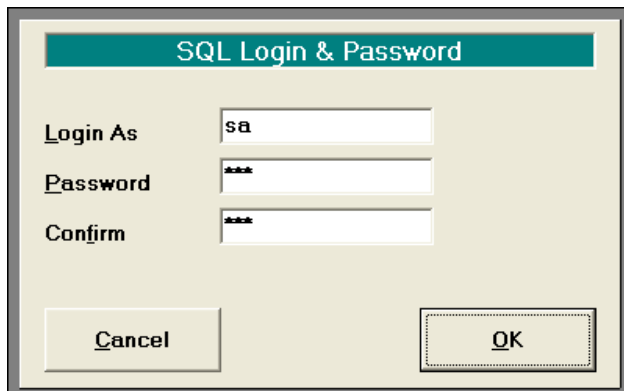
Then put in the details, select the *DSN*, and *DSN Work*, tick for *SQL Server*.

Select *Security*.



The 'Data Source' dialog box features a teal header with the title 'Data Source'. Below the header are two buttons: 'New' and 'Delete'. The main area contains several fields: 'Alpha Code' with the value 'SPM', 'Comment' with the value 'SPM', 'DSN' with a dropdown menu showing 'Australian SQL', and 'DSNWork' with a dropdown menu showing 'AustralianWorkSQL'. There is an empty 'Location' field. Below these are two checkboxes: 'SQL Server' (checked) and 'Network' (unchecked). To the right of the 'SQL Server' checkbox is a 'Find Mdb' button. Below the 'Network' checkbox is a 'Security' button. At the bottom of the dialog are 'Cancel' and 'OK' buttons.

Then put in the details for the connecting to the SQL Server database and press ok.



The 'SQL Login & Password' dialog box has a teal header with the title 'SQL Login & Password'. It contains three text input fields: 'Login As' with the value 'sa', 'Password' with three asterisks, and 'Confirm' with three asterisks. At the bottom of the dialog are 'Cancel' and 'OK' buttons.

Desktop

The Installation routine creates an **Incisive** folder on the desktop, with a number of icons. You will usually have an icon for **Special Practice Manager**, **Update Program Files** and **Update Database**, there may be more depending which installation you selected.



Update Program Files

The Installation routine creates a batch file that allows you to copy the latest program updates from the \Spmwin\Updates directory on the Server to the local \Spmwin directory on the Workstation or laptop. The batch file (update.bat) will need to be checked edited and the pathname changed if necessary.

Copy pathname\Spmwin\updates. * c:\SPMWIN*

ODBC - Linking to Data Sources

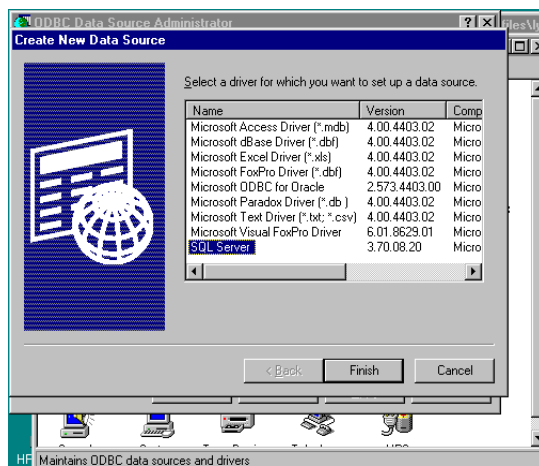
SPM uses the ODBC mechanism to connect to the SQL database.

The installation process will do most of the work required for the application to connect to the database but it is worthwhile checking the connections

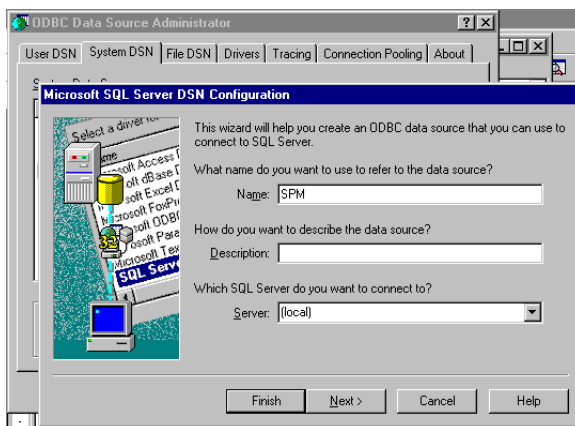
Microsoft SQL Server database

Note that you need to add DSN links to TWO databases – one to the SPM database and the other to the SPMWORK database.

To set up the data source for SQL go to the Control Panel, (Administrative Tools – Data Sources ODBC) select ODBC Data Sources, then System DSN, Add, highlight SQL, Finish.

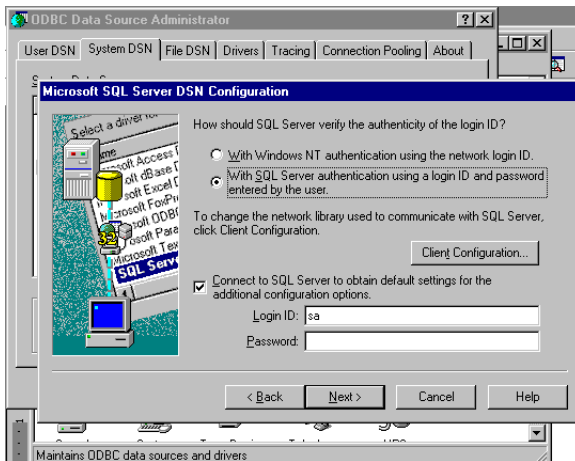


Enter the data source name – this will be SPM (and subsequently SPMWORK).

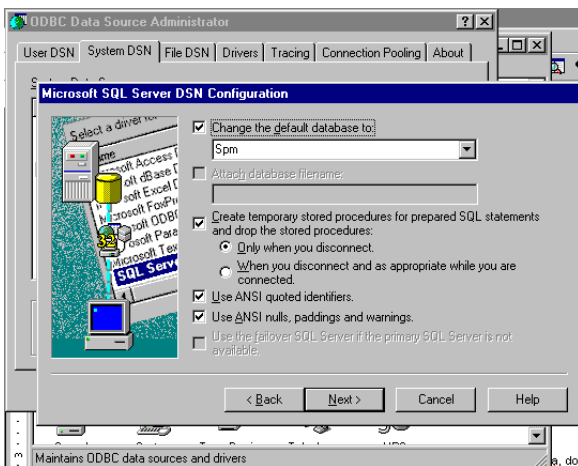


Select the server location, this will usually be available in the drop down box but may need to be typed, nex

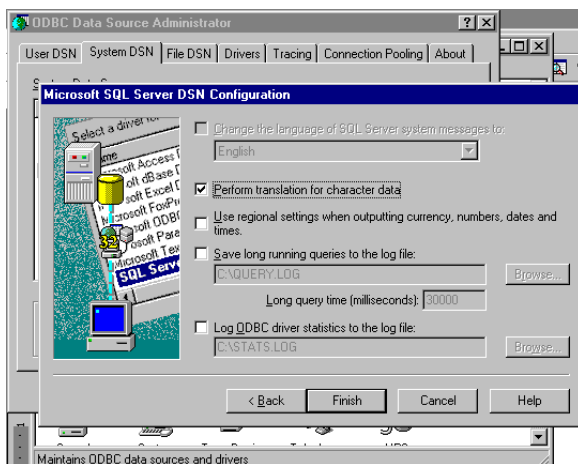
Select the SQL server authentication option:



Select the "connect to SQL server" option, Login ID = isw, password, =isw
Select Next



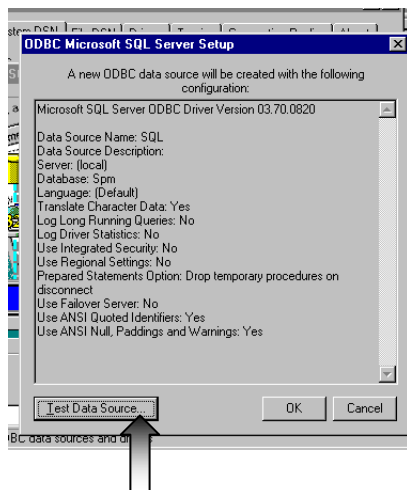
Change the default database to SPM, accept the default checks.
Select Next



Accept the default checks. Finish.

The screen will then display to show the settings you have selected, check these are correct.

Test Data Source to ensure everything is correct and OK to finish.



Repeat this entire process for the SPMWORK database.

NB: ensure spmwork ODBC entry points to the SPMWORK database and not the SPM database.

Printers

Ensure the latest printer drivers are installed for the printers that will be accessed by the workstation.

In Windows, choose the main printer as the '**default printer**' by going to **Start -> Settings -> Control Panel -> Printers**. Right mouse click on the printer and then left mouse click on the Properties option on the menu. Use this to select this printer as the default.

Also check to see that the **Default Paper Tray** option is set to any tray other than '**Auto-select**'

For label printers that feed the labels from a roll ensure that the Paper Orientation is set to **Landscape**.

Finally, configure the printers for the SPM software. Look at the appropriate section in the SPM Manual or call the Incisive office.

Scanners

Download and install onto the computer that the scanner is connected to, the latest TWAIN driver for the scanner. At worst, use the one supplied with the scanner but be aware that these are often out of date.

You can check to see if the TWAIN driver is properly installed by going into **Settings – Control Panel – Scanners & Cameras**.

Ensure the paths to the scanned document directories are set correctly in the application. **Setup – System – File Locations**. Use the UNC method to name the path.

Contact Incisive Medical Systems for further information on installing and configuring the software for:

Running on Terminal Server or Citrix

Data replication for offsite use

Sending faxes

Sending or receiving electronic files