

Installation Guides

Installation Guides

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Installation Guides

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Intro to Installing SOAPware

Welcome to the SOAPware Installation Guides for DataServer, SOAPware and DataManager, designed to lead you through an easily understood, step-by-step process for installing and configuring our products.

If you run into any issues or have questions related to installing our products, please don't hesitate to contact us for assistance. Submit an online ticket request for Technical Support at: http://www.soapware.com/Ticket/.

ASOAPware installation consists of three main parts: the DataServer, SOAPware and the DataManager. Before beginning the installation process, please review this guide completely.

Review the Hardware Recommendations

Click here to ensure your hardware is compatible.

Install the SOAPware DataServer

Click here to view the installation instructions.

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Installing the SOAPware DataServer

The SOAPware Data Server Installer will install an instance of the postgreSQL database engine on a server or PC. This lesson provides instructions for installation of the SOAPware DataServer.

Intro to Installation

If you run into any issues or have questions related to installing our products, please don't hesitate to contact us for assistance. Submit an online ticket request for Technical Support at: http://www.soapware.com/Ticket/.

Installing the SOAPware DataServer

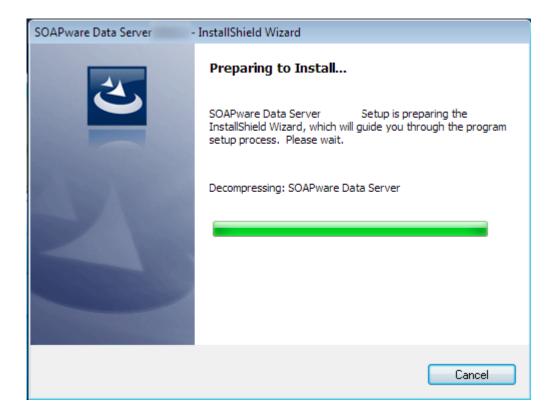
Before starting the SOAPware DataServer installer, log into the Server using the Administrator account. If you do not have access to the Administrator account, please contact your Network Administrator.

To start the SOAPware DataServer installation double click on the installer icon, or if you are installing on Windows Vista or Windows 7, you will need to right click on the install file and choose "Run as Administrator."

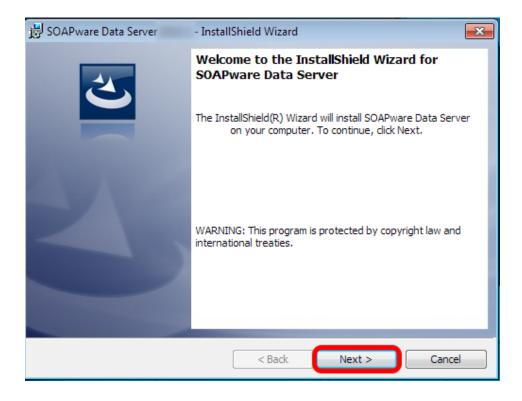
Note: You may be asked to install a Windows component when starting the Data Server installation. If you are prompted, Click the Install button to begin.

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1. SOAPware Data Server InstallShield Wizard



Once launched, the SOAPware Data Server InstallShield Wizard will open. This wizard will guide you through the program setup process.



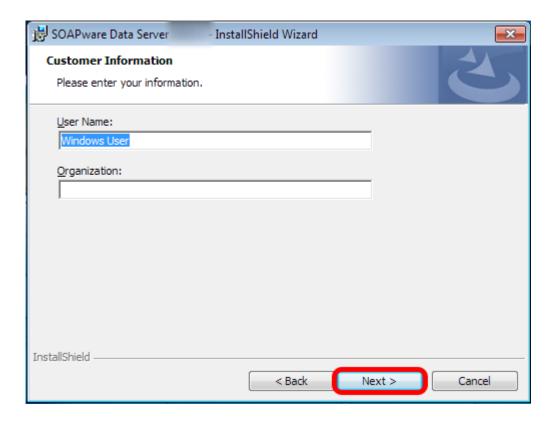
On the Welcome to the InstallShield Wizard for SOAPware Data Server screen, Click Next.

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2. Follow the On Screen Instructions

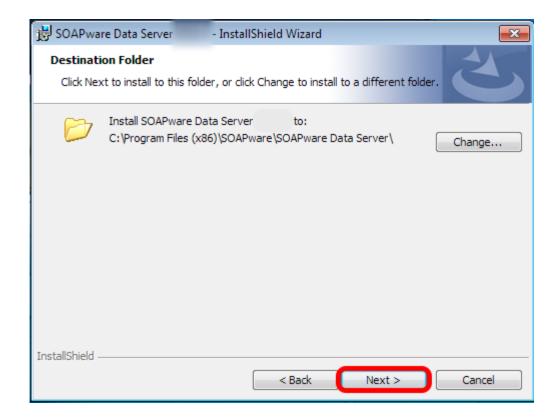


On the Installation Notes screen, read the installation notes, then Click Next.

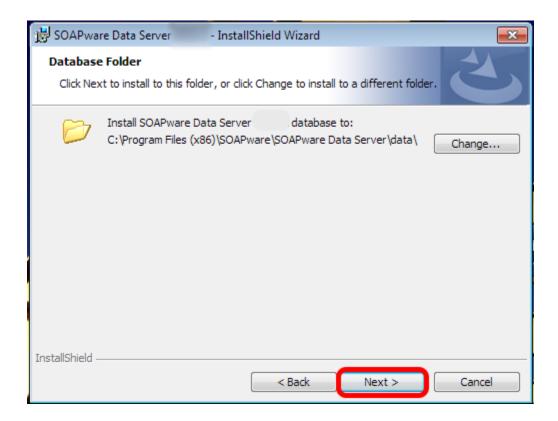


Complete the Customer Information if desired, then Click Next.

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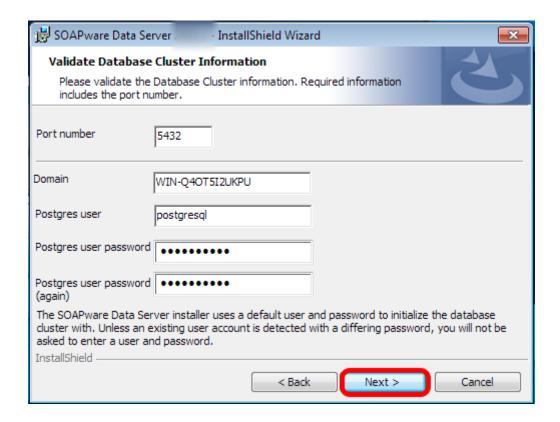


The Destination Folder window will appear. Click Change to alter the location of the database if desired. **Click Next** to continue.

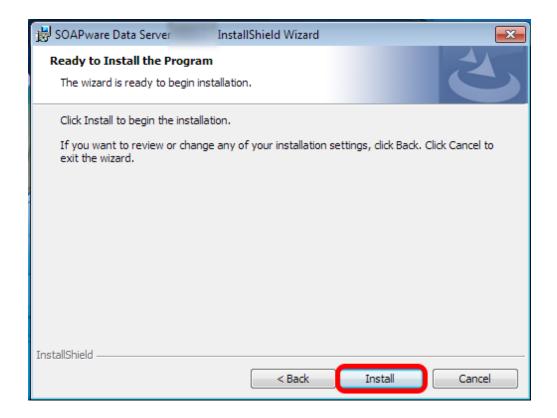


Next, the Database Folder window will appear. Click Next to continue.

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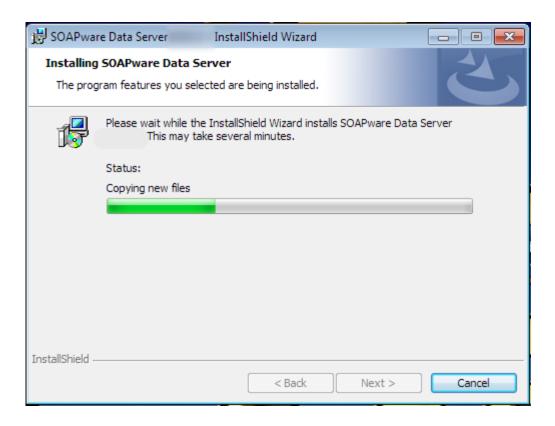


Next, the Validate Database Cluster Information window will appear with pre-populated data. For most users, no changes to the information will need to be made. **Click the Next button** to continue.

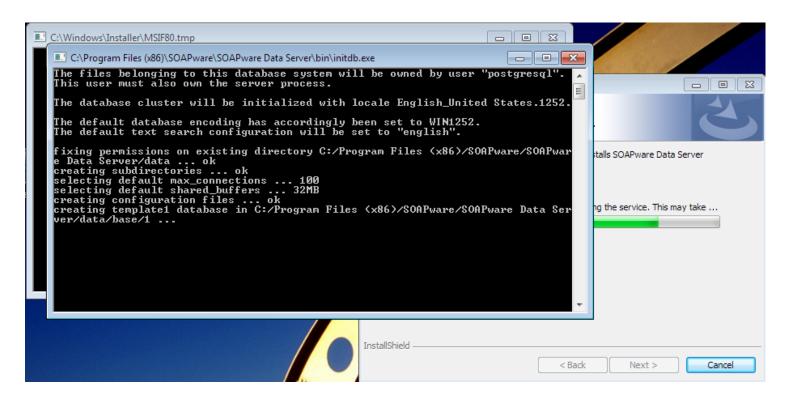


Click the Install button to begin the installation.

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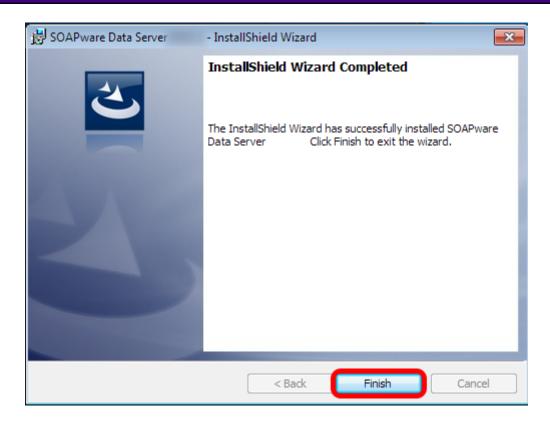
The installation process for the SOAPware DataServer will begin. The installation progress will be displayed in the Status bar.



As the installation runs, multiple windows will pop-up. The user is not required to perform any additional actions in the pop-up windows. Simply allow the installation to run.

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Installation Complete!



Once the installation is complete, the above dialog will appear. **Click the Finish button** to complete the installation process.

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Installing SOAPware

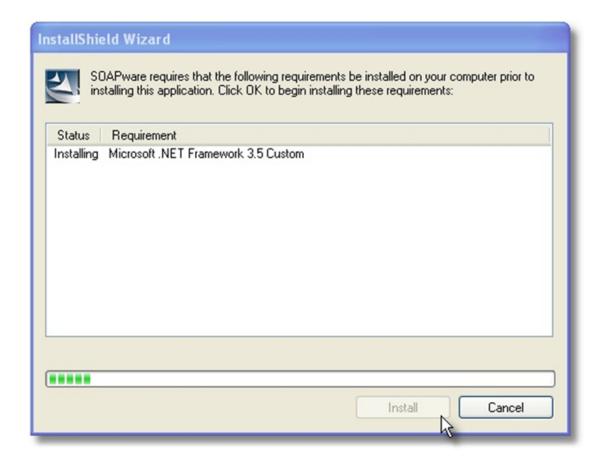
This lesson provides detailed instructions for installing the SOAPware EHR to your system.

Installing SOAPware

Before starting the SOAPware installer, log in to the computer using the Administrator account. If you do not have access to the Administrator account, please contact your Network Administrator.

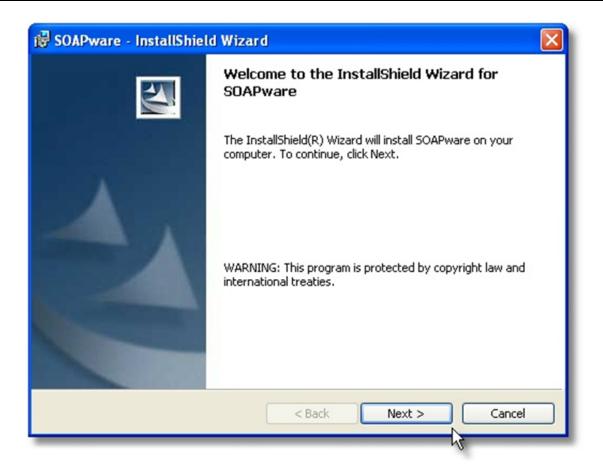
If you are installing on Windows Vista or Windows 7, you will need to right click on the install file and choose "Run as Administrator."

Click Install to install the .Net SOAPware prerequisite if needed



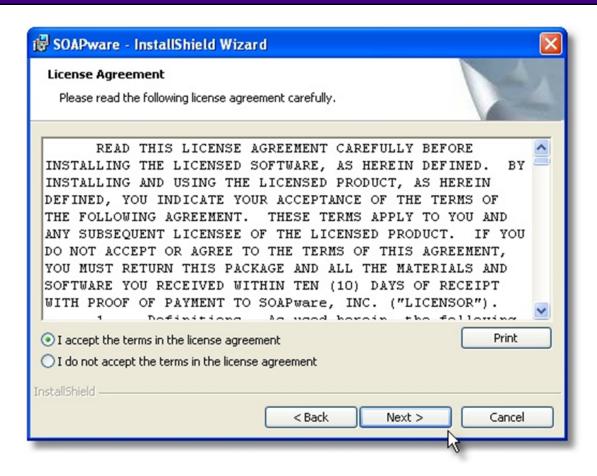
If your PC needs a newer version of Microsoft .NET Framework to use SOAPware on it, you will be prompted to install this. Click Install on this window to proceed.

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Now the InstallShield Wizard will then begin. Click Next on the Welcome Screen.

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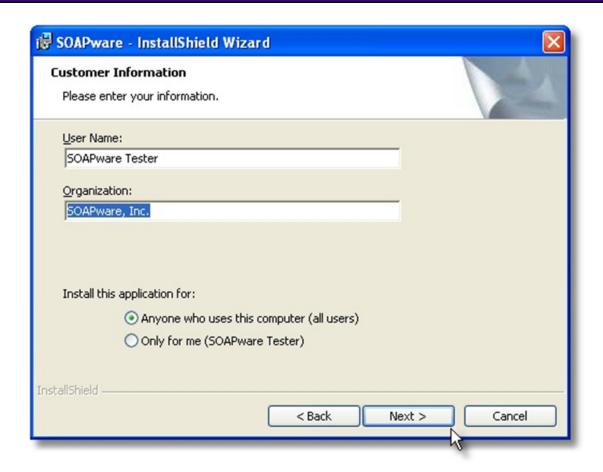


On the License Agreement screen, **please read the license agreement**. If you agree to the terms of the License Agreement, Select "I accept the terms in the license agreement" and Click **Next**.

If you do not agree to the terms of the License Agreement, Select "I do not accept the terms in the license agreement", and Click **Nex**t. The installer will exit, and you will not be able to install SOAPware.

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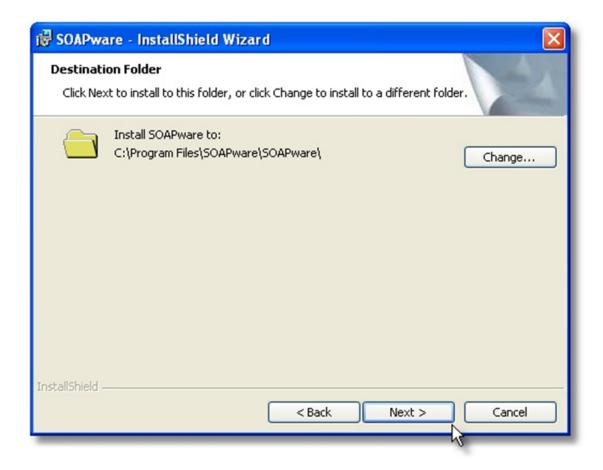
Customer Information Screen



On the Customer Information screen, fill in the appropriate information and Click Next.

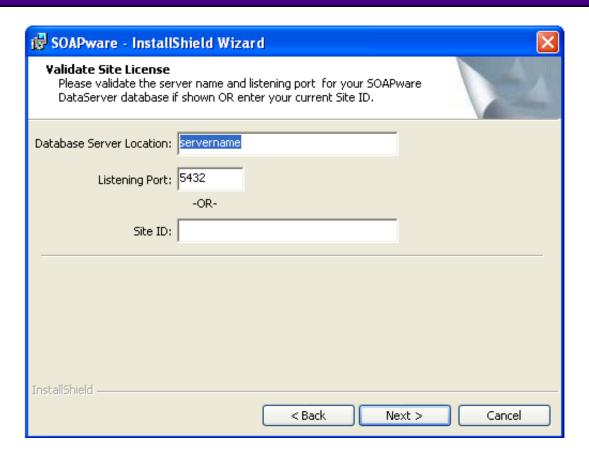
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Destination Folder Screen



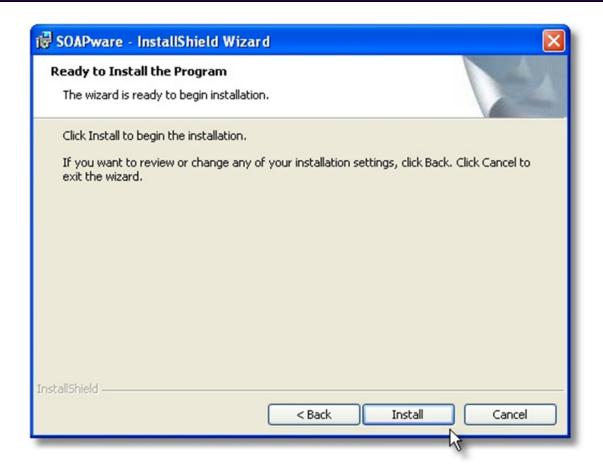
On the Destination Folder screen, change the install location if needed, and Click Next.

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To validate your license, SOAPware will either connect to your database or you can supply your site ID that was sent upon initial installation of SOAPware. In the Database Server Location, type in the name of the computer that the SOAPware DataServer is installed to. If you have never logged into your database, simply paste in your Site ID that was sent in an email to you after the purchase of SOAPware.

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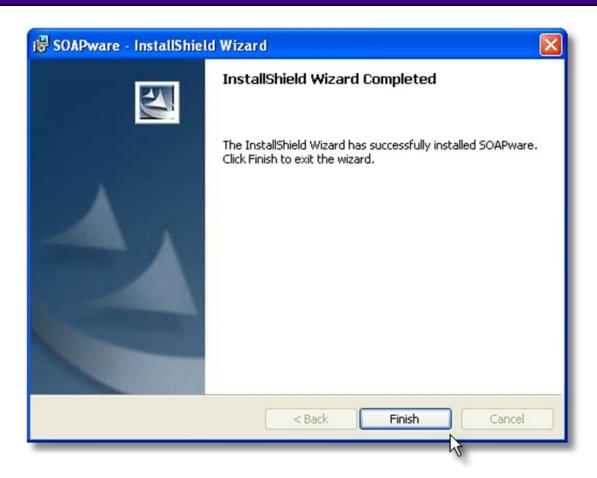
On the Ready to Install the Program screen, Click Install.

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The install process will begin.



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Once the installation is finished, you will see the Completed screen. Click Finish to exit the installer.

Congratulations, you now have SOAPware installed!

Lets go ahead and start SOAPware...

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To Start SOAPware, Click Start, All Programs, SOAPware, SOAPware.

You should then see the SOAPware User Login screen.

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Login using the User ID administrator and the password soapware.



Login using the User ID administrator and the password soapware.

Note: The password is case sensitive and all lowercase.

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In the Server box type the IP address of your server or the server name of your server.



Once you have filled in the appropriate information, Click **Login**.

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Before you start using SOAPware for the first time, you will need to register the product.

The first time that you run SOAPware, you will receive a **Site Registration** dialog box with a space to enter the Site ID.

Note: An active internet connection is required for registration.

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With an active internet connection, enter in the Site ID as provided with the SOAPware license.



Note that you can use the Windows shortcut keys to Copy (CTRL + C) and Paste (CTRL + V) into this box. Once the Site ID has been entered, Click **Register**.

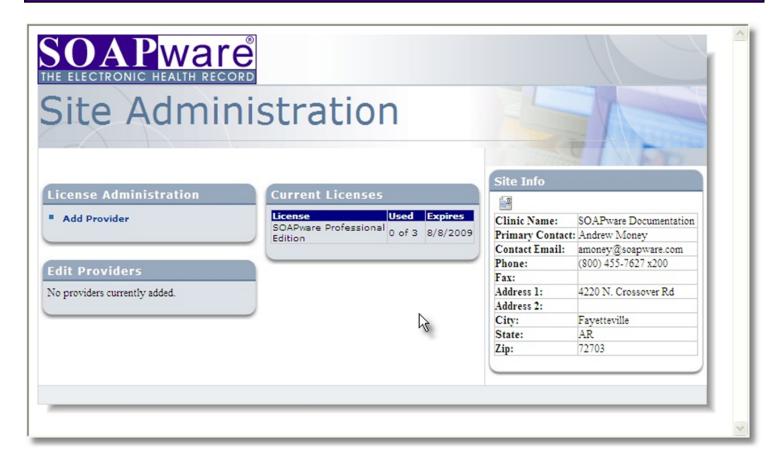
If you enter the wrong Site ID, you will receive the following message, "Site ID specified is not valid. Please enter the proper Site ID or contact SOAPware Support for assistance."

Once the site registration is complete, you will receive a message prompting you to setup providers for your site.



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With an active internet connection, you will then be taken to the SOAPware Site Administration page.



This page contains all of the license information for your site.

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Enter the appropriate information for the provider.



When the appropriate information has been filled in, scroll to the bottom of the page and make sure any appropriate modules you have purchased are checked off. The possible enhancements include:

SOAPwareXChange, Faxing from SOAPware, SOAPware Billing Standard and the Clinical Knowledge Module.

If you see any of these at the bottom, check them off if you would like this provider to use these modules.

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Note: If more than one provider license has been purchased, and you would like to set up the additional licenses, Click **Save/Add New**.

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After all of the license information has been entered, Close the SOAPware Site Administration page and click Register again in the Site Registration window.

The first time that SOAPware loads, you will be prompted to change the Administrator password. This is for security reasons.



Click OK to begin changing the default administrator password.

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To change the current password...



...type **soapware** into the **Old Password** box, the new password into the **New Password** box, and then the **Confirm Password** boxes. For added security, the password will be masked as it is typed into SOAPware.

DO NOT FORGET THIS PASSWORD!!!

WARNING: DO NOT LOSE THE ADMINISTRATOR PASSWORD!!! SOAPware, Inc. CAN NOT RECOVER LOST PASSWORDS!!!

When you have filled in the appropriate password information, Click **OK**. SOAPware will then load and the program will be ready for use.

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Installing SOAPware DataManager

This lesson provides illustrated instructions for completing the installation of the SOAPware DataManager to your system.

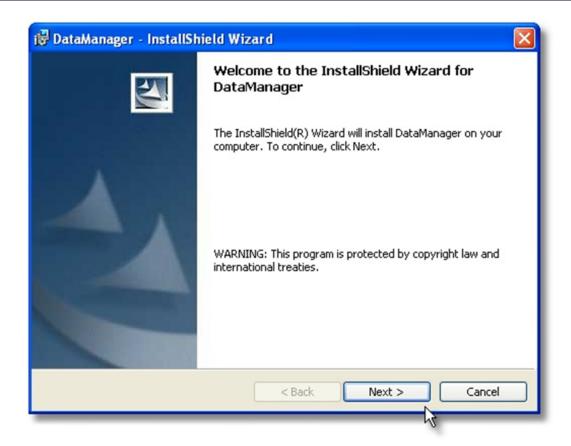
Before You Begin

Before starting the SOAPware DataManager installer, log in to the Server using the Administrator account. If you do not have access to the Administrator account, please contact your Network Administrator.

Ensure that everyone is out of SOAPware when installing DataManager as the installation will restart the database to make necessary changes to the database.

If you are installing on Windows Vista or Windows 7, you will need to right click on the install file and choose "Run as Administrator."

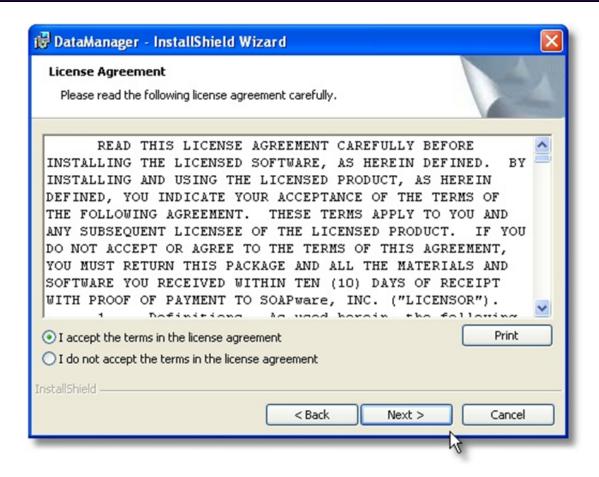
Installing the SOAPware DataManager



If you are installing on Windows Vista or Windows 7, you will need to right click on the install file and choose "Run as Administrator."

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Read the License Agreement

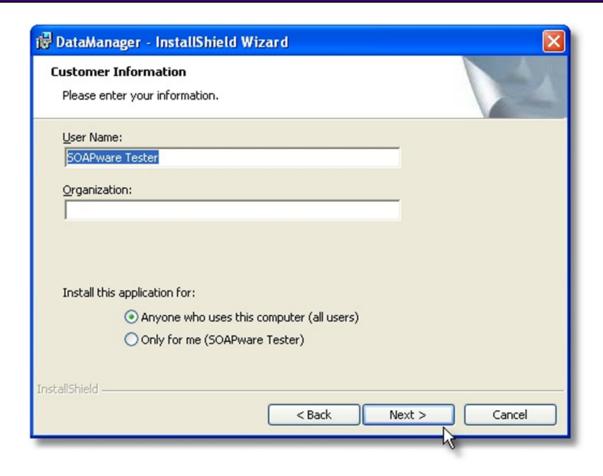


On the License Agreement screen, **please read the license agreement**. If you agree to the terms of the License Agreement, Select "I accept the terms in the license agreement" and Click **Next**.

If you do not agree to the terms of the License Agreement, Select "I do not accept the terms in the license agreement", and Click **Nex**t. The installer will exit, and the SOAPware DataManager will not be installed.

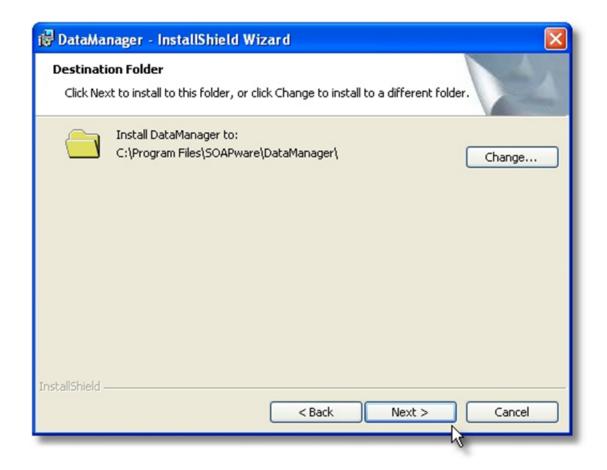
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When the Customer Information screen appears, fill in the appropriate information and Click Next.



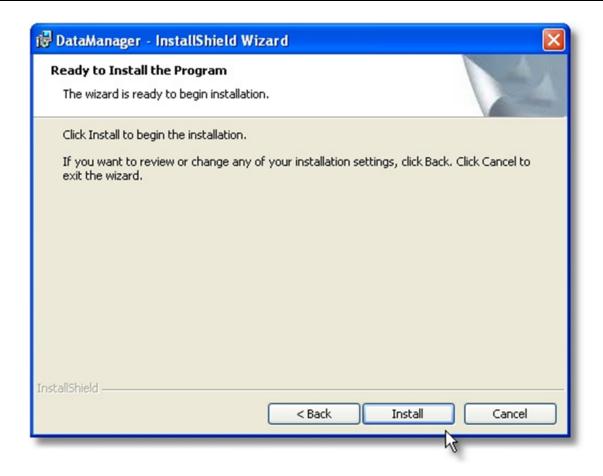
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On the Destination Folder screen, change the install location if needed, and Click Next.



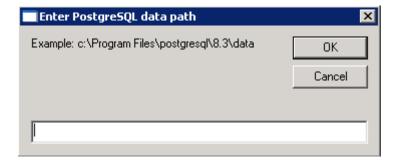
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On the Ready to Install the Program screen, Click Install.



The install process will begin.

Enter PostgreSQL Data Path



You may be prompted to supply the SOAPware DataServer path. By default, this is C:\Program Files\PostgreSQL\8.3\data. On Windows Vista or 7, the default path is C:\Program Files (x86)\PostgreSQL\8.3\data. If you customized the location of the DataServer during the DataServer installation, insert this location to continue and then click OK.

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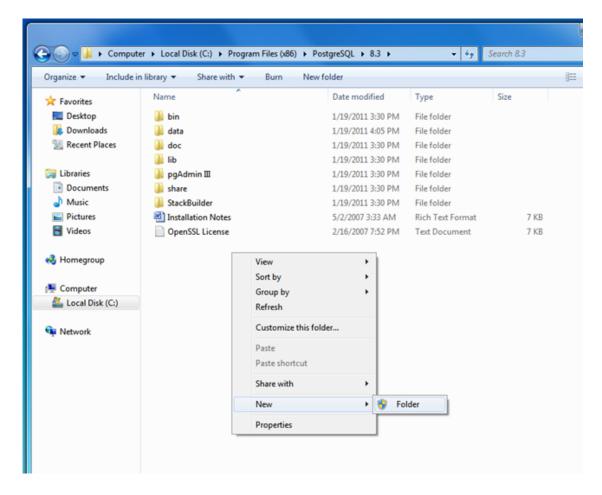
Completed Screen



When the installation is finished, the InstallShield Wizard Completed screen will appear. Click Finish to exit the installer.

Congratulations! SOAPware DataManager has been installed!

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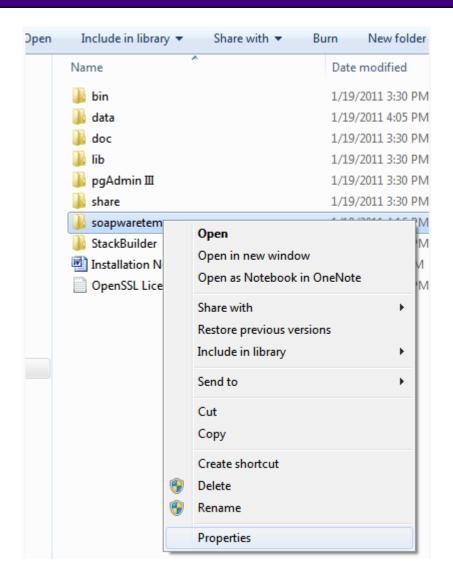
Open My Computer and browse to C:\Program Files\PostgreSQL\8.3 (or the install folder for your database server) and create a folder named soapwaretemp.

For example, if your server is installed in C:\Program Files\PostgreSQL\8.3 (the default location) then you will want to create the directory in the following location: C:\Program Files\PostgreSQL\8.3\soapwaretemp

For 64-bit systems, the PostgreSQL folder will be in C:\Program Files (x86)\ instead.

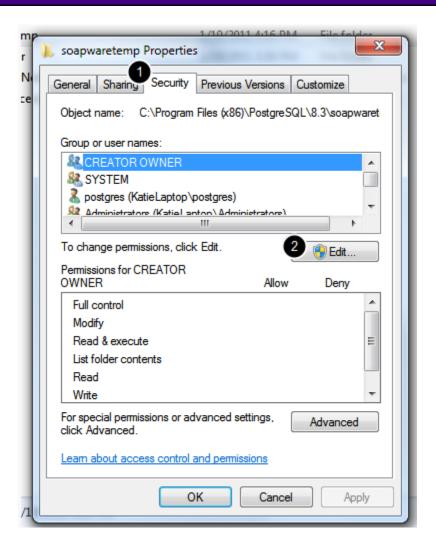
The steps to create this folder will differ slightly based on your version of Windows.

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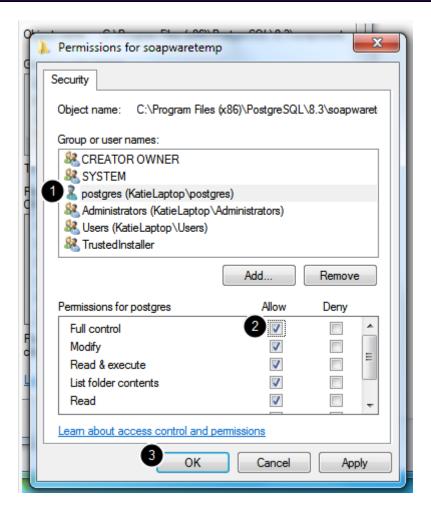
Right Click on the soapwaretemp directory and click 'Properties'

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Go to Security (1) and click Edit (2)

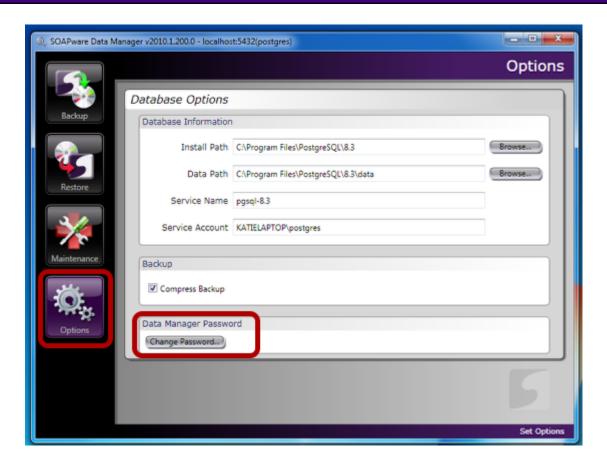
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Select postgres from the list of groups and users (1), then check Full Control (2), Click OK (3).

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Change Password



It is strongly recommended to change your database password.

To do this, go to Start, Programs, SOAPware, SOAPware DataManager and then login with the password of soapware.

Once they are logged in, click Options on the left side, then click Change Password to reset their database password.

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Backing Up SOAPware Data

The SOAPware DataManager is a database utility designed for the Postgres database. It uses existing, tried-and-true utilities provided by Postgres and Windows, but is wrapped up in a simple, easy-to-use interface.

The DataManager allows the user to create and schedule backups, schedule maintenance tasks and perform database restores. Before going live using SOAPware in a production environment, it is important to do a restore test on a different PC/server. Establish a schedule to perform regular test restores in the future and do them anytime there are changes in the system configurations.

SOAPware HIGHLY recommends that all users use Data Manager to create regular backups.

Installing Data Manager

To install Data Manager, see the link here: Installing Data Manager.

Data Manager Changes

The SOAPware Database Service is shut down during a backup - all users must be out of SOAPware before making a backup.

If a user previously scheduled a backup with any version **before** 2010, this scheduled backup will NO LONGER WORK with 2011 Data Manager. Auser need to create a new scheduled backup.

Start the SOAPware Data Manager



To start the SOAPware DataManager, Click Start > All Programs > SOAPware > SOAPware DataManager.

If users are running on Windows Vista or 7, users will need to right-click on the install file and choose "Run as administrator."

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When a user starts DataManager, the user must log in with the database administrator password. This defaults to the PostgreSQL user account on the database. (This is the second set of passwords created during the SOAPware Data Server installation).

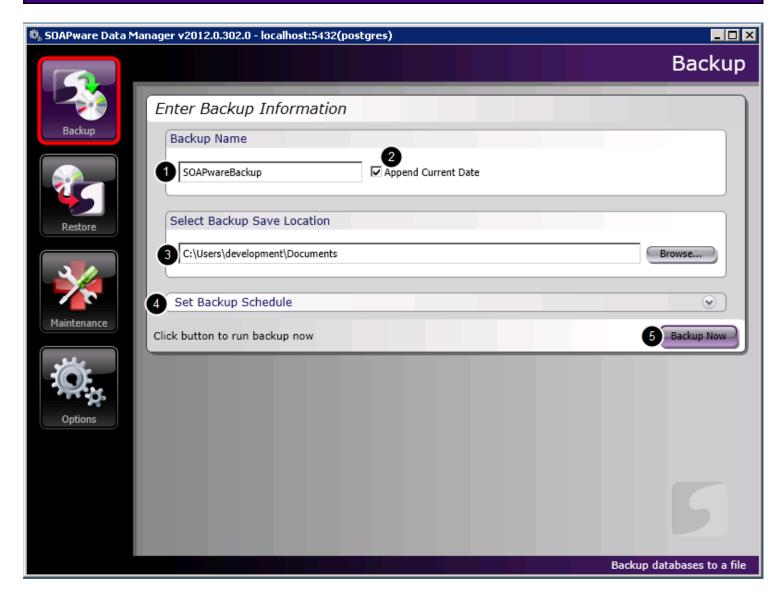
NOTE: The database administration password is NOT the same as the SOAPware Administration password. The database administration account only accesses the PostgreSQL database.

Only use the Advanced section if the server, port, or database administration user name is different than the default settings.

- Server: Host name or IP address where the database is running. The default is "localhost".
- **Port**: Port number where the database is listening. The default is port 5432.
- **User Name**: The administration user on the database. User must have administration privileges. The default setting is PostgreSQL.

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Enter Backup Information



The backup routine creates a copy of the user's data folder. It contains all the user, tablespace, table and data information needed to restore the user's database completely.

Backup file sizes can range from about 50 MB to many Gigabytes, depending on database size and compression options.

It can take from 20 minutes to several hours for a backup to complete. SOAPware cannot be used while the backup is running. Please plan to schedule backups to run nightly for the best results.

- 1. **Backup Name:** Users should choose a meaningful backup name that can be easily remembered.
- 2. **Append Current Date:** This will attach a date stamp of when the backup was run. If checked, new backup files will be created each day, which in turn will create multiple backups. This helps ensure the user's data, but the user must also delete old backup files every so often to

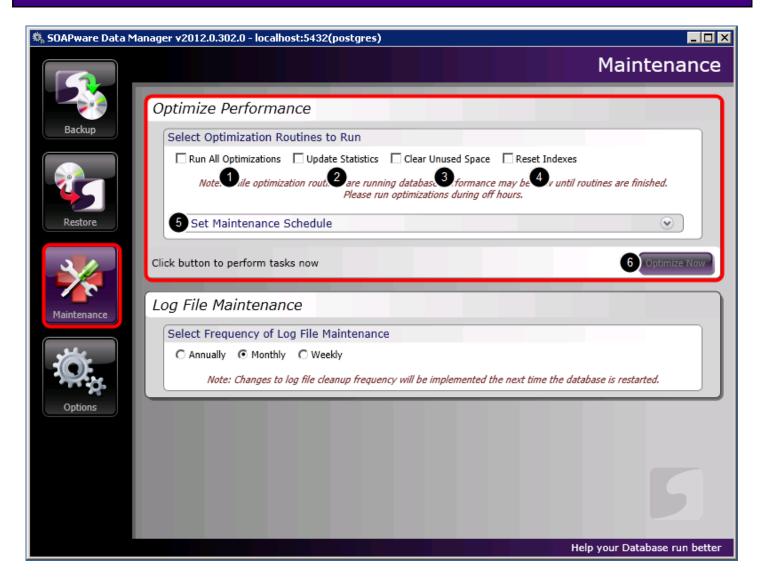
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prevent the backups from taking all the space on the drive. If this is not checked, the backup will overwrite the last backup each time.

- 3. **Select Backup Save Location:** Choose the folder where the backup file will be placed.
- 4. **Set Backup Schedule:** This header is collapsible. Click it to view or hide scheduling options. See the Scheduling section below for more details on setting a backup schedule.
- 5. **Backup Now Button:** Click this button to run a backup using the settings on this tab.

*Note: A backup can be canceled. It will delete the current backup file, and the database will not be affected. If a backup is canceled, go to Start > Programs > PostgreSQL 8.x, and Click "Start Service".

Maintenance: Optimize Performance



Databases need to be optimized and cleaned up routinely for maximum performance. Higher traffic databases should be optimized more often, sometimes daily. Lower traffic databases may only need to be optimized once a week or once a month.

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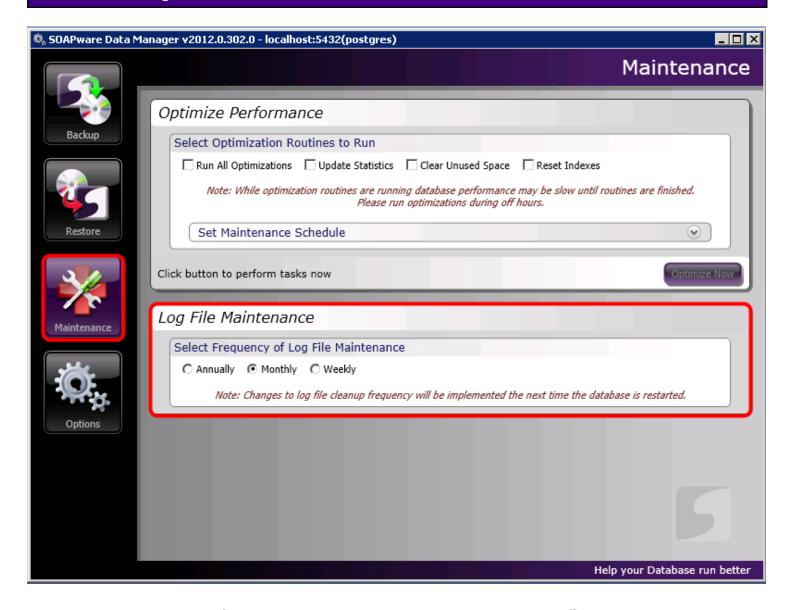
Optimizations may take from 30 minutes to several hours to complete.

- 1. **Run All Optimizations:** Perform each optimization (Recommended)
- 2. **Update Statistics:** Resets all table statistics, row counts, etc.
- 3. Clear Unused Space: This is useful after multiple deletions to reclaim space left behind.
- 4. Reset Indexes: Refreshes table indexes to help data retrieval.
- 5. **Set Maintenance Schedule:** This header is collapsible. Click it to view or hide scheduling options. See the Scheduling section for more details on setting a maintenance schedule.
- 6. Optimize Now Button: Click button to perform selected optimizations.

*Note: Running optimizations may degrade database performance. We recommend setting a Maintenance schedule to run at night or weekends when database traffic is low.

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Maintenance: Log File Maintenance



The Log File Maintenance feature within DataManager allows the user to effectively control the number of log files that will be stored in the "pg_log" folder.

The user can select the frequency of the log file maintenance by choosing annually, monthly, or weekly.

- **Weekly**: If the "weekly" option is selected, the files will be kept for up to one week before being overwritten with new files for the following week.
- Monthly: If the "monthly" option is selected, the files will be kept for 30 days before being
 overwritten with new files for the following month.
- **Annually**: If the "annually" option is selected, the files will be kept for 365 days before being overwritten with new files for the following year.

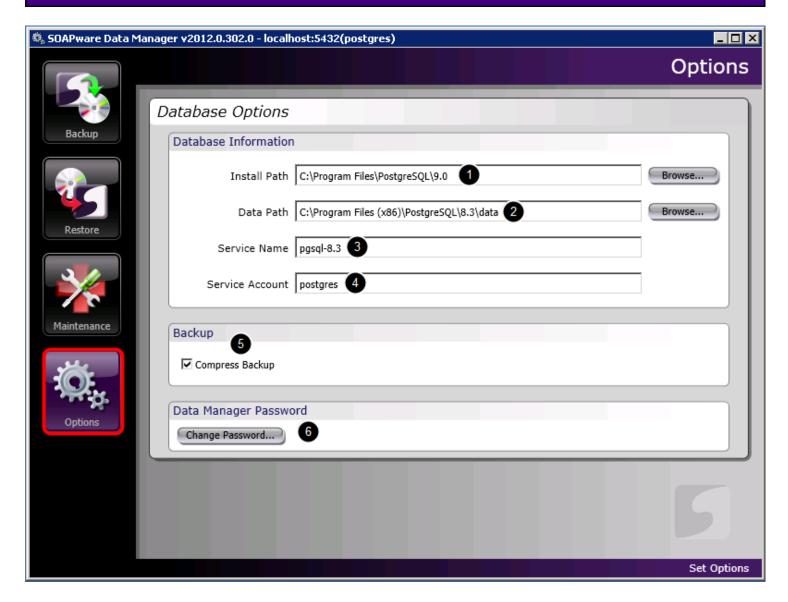
The user should choose whichever option will best suit the database. The default setting will be

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set to "Monthly".

*Note: Please note that any changes to log file maintenance will be implemented the next time the database is restarted.

Options: Database Options



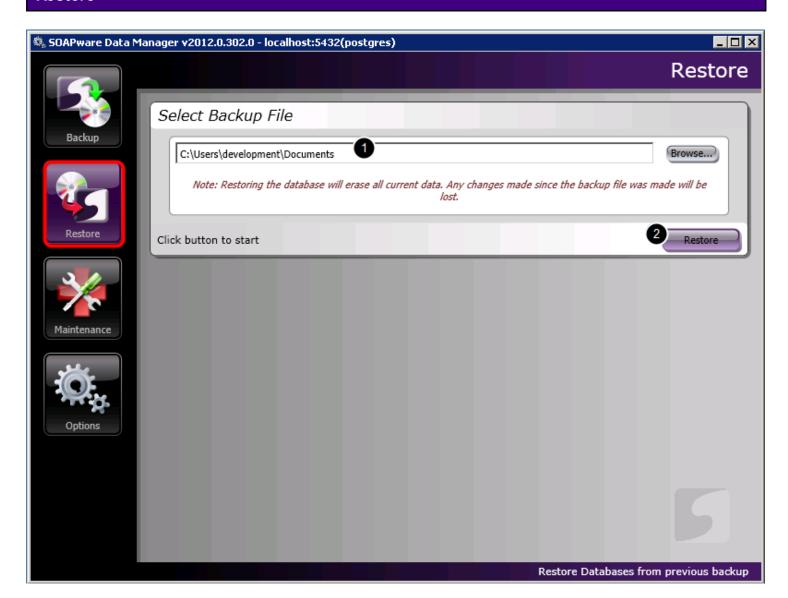
- Install Path: The DataManager uses Postgres utilities for backup and restore. This path should not be changed unless the Postgres install path is different than listed.
- 2. **Data Path:** This section is used to point the DataManager to the location where the data is stored in order to backup. By default the path will be C:\Program Files (x86)\PostgreSQL\8.3\data.
- 3. **Service Name:** The service name is the name of the SOAPware PostgreSQL Data Server service. Typically, this will be pgsql-8.3. To check, go to Start > Programs > PostgreSQL 8.x, a user will see either PostgreSQL 8.3 or PostgreSQL 8.2. The service name will either be pgsql-8.3 or pgsql-8.2 depending on which version the user has.

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- 4. **Service Account:** This is the windows user that starts the SOAPware PostgreSQL Data Server after the backup is complete. This should always be postgres.
- 5. **Compress Backup:** This option compresses the backup file as it is being written. Use this option to keep file sizes at a minimum.
- 6. Data Manager Password: Use this to change the database administration password.

*Note: The database administration password is NOT the same as the SOAPware Administration password. The database administration account only accesses the PostgreSQL database.

Restore



The DataManager can take a previously made backup file and restore the database to its original state.

*Note: After the restore is completed, any user passwords or preferences changed since the backup will be reset to previous state.

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- 1. **Select Backup File:** Choose the backup file created by the DataManager to run a restoration.
- 2. **Restore Button:** Click this button to start the restoration.

If restoring a compressed backup file, the DataManager needs to decompress the backup to the PostgreSQL data directory. The data folder can take as much as seven times the compressed file size needed in hard drive space. For example, a 3GB compressed backup may need an extra 20GB of hard drive space to run the recovery.

If a restoration is attempted and there proves to be insufficient disk space, the process will fail and must be restarted. Simply make more room, or re-install the SOAPware PostgreSQL Data Server to another drive with more space and restore to that drive.

*Note: Users must wait 10 minutes between creating a backup and running a restore in order to clear out the connections.

WARNING: Running a restore will replace all the data and table structures within the database. The old database will be deleted. This process cannot be canceled.

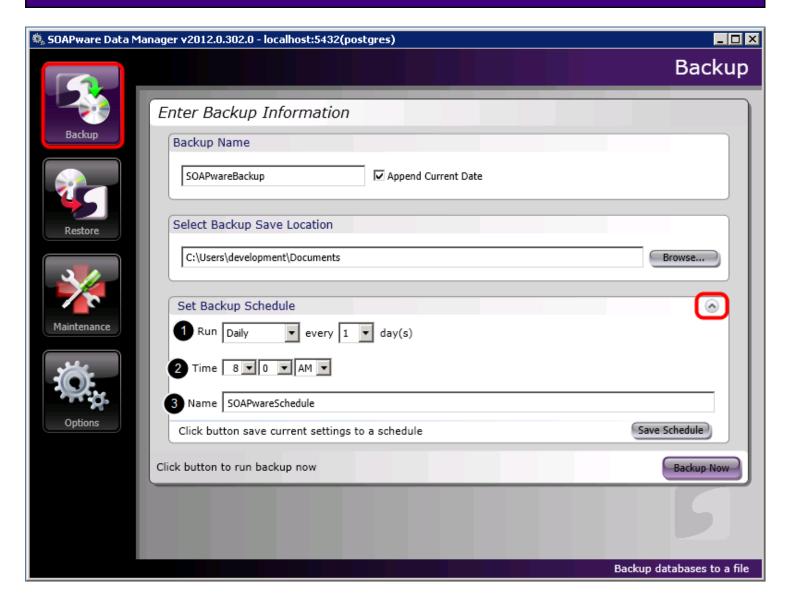
Scheduling Backups and Maintenance

The DataManager provides an easy-to-use interface to create a Windows Task scheduled event to run a user's backup and maintenance routines. Simply setup a backup or maintenance task as outlined above, then choose the schedule frequency. When a user saves the schedule, a user's task will run at that time.

For advanced users, maintain existing tasks using the Windows Task scheduler. For more information, start here at the Microsoft Task Knowledge Base.

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Create a New Scheduled Task

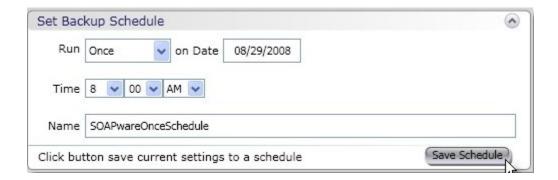


After setting the backup or maintenance information, click on the "Backup" button in the top left hand corner. Expand the "Set Backup Schedule" tab by clicking on the down arrow icon.

- 1. **Run:** Under the Run drop down, you may choose the schedule run type from Once, Daily, Weekly or Monthly. Different options will appear depending on the type of schedule selected.
- 2. **Time:** Set the time for the task to run. This should be a time when there is no database activity.
- 3. **Name:** Name the schedule so that it will be unique within the Windows Task Manager. If there is already a task with the same name, it will ask if you would like to overwrite the existing task.

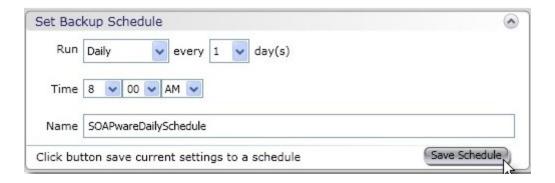
Installation Guides - 52 SOAPware, Inc.

Run Once



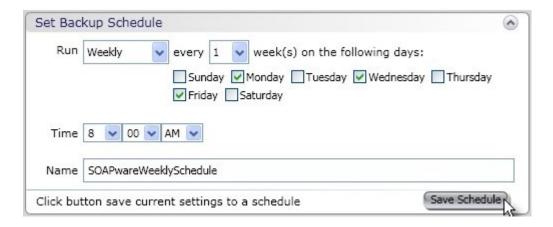
This option will run the task only once on the specified day and time.

Run Daily



This option will run the task daily. Auser can choose to skip a number of days.

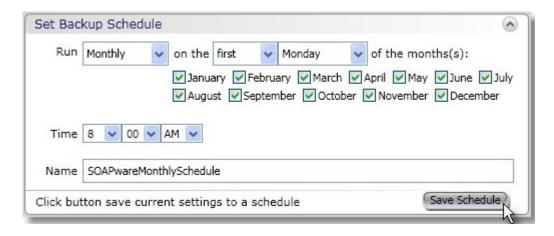
Run Weekly



Running a task weekly allows a user to choose which days of the week to run. Auser may also skip weeks.

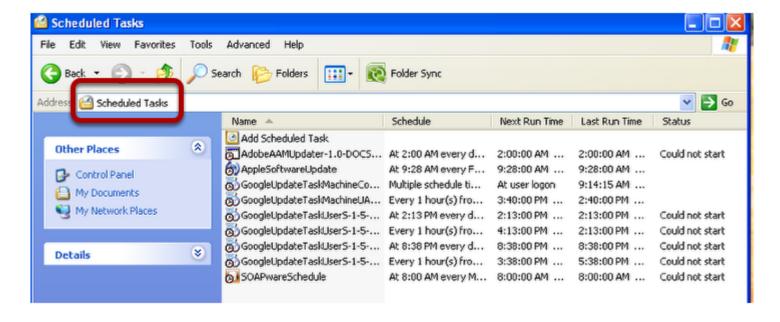
Installation Guides - 53 SOAPware, Inc.

Run Monthly



Amonthly task allows a user to set the task to run once a month on a certain day. Auser may check the months to run the task.

Change Existing Schedule

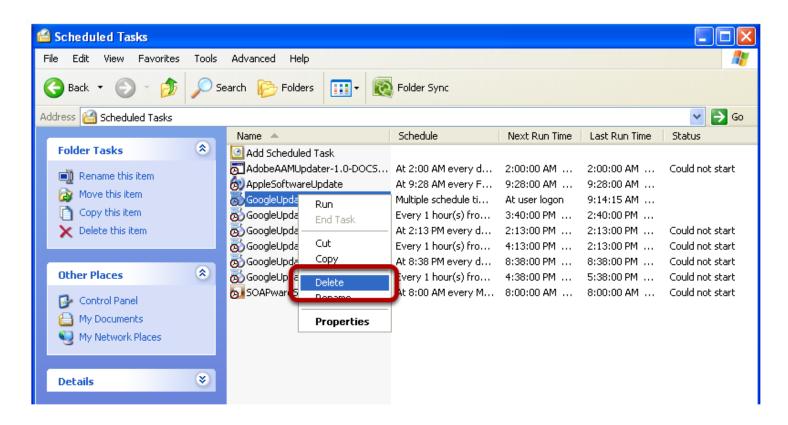


To change an existing schedule, a user would simply setup a new schedule with any new backup or maintenance or schedule data, and give the same schedule name as an existing task. This will overwrite the existing task with the new information.

To find a list of a user's existing schedules, look in the Windows Task Scheduler for the tasks. Go to the Windows Start menu, then open the Control Panel. Open Scheduled Tasks, and it will list all the current tasks. Auser may edit these directly to change the schedule, but to change the backup or maintenance parameters, a user must use the DataManager and overwrite one of the tasks.

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Delete Existing Schedule



To delete an existing schedule, open the Scheduled Tasks control panel as mentioned above. Right click on the task and choose Delete.

Data Manager Log Files

Log files can give the user details on how tasks are running. They provide information about what tables were used and any warnings or errors which may have occurred. Each time the DataManager is used, either in the GUI or in a scheduled task, it will create a log file of the events.

Find the logs where DataManager is installed at: %DataManager Install Path%\Logs

The Logs directory will only keep the last 10 log files so there is no need to clean out this directory or to worry about it filling up. If a user plans to keep a log file for support or other needs, be sure to move it out of this directory, or it could be deleted as more log files are created.

SOAPwareXchangeHL7 and SOAPwareXchange

Users who are running either the SOAPwareXchangeHL7 or SOAPwareXchange, must NOT be running when a backup via Data Manager is running. If a user has a scheduled backup set, then both Xchange and XchangeHL7 must be not be running. This can be accomplished by using the SOAPwareXchangeHL7 & SOAPwareXchange Command Line article to both stop and start

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SOAPware Automatic Updates

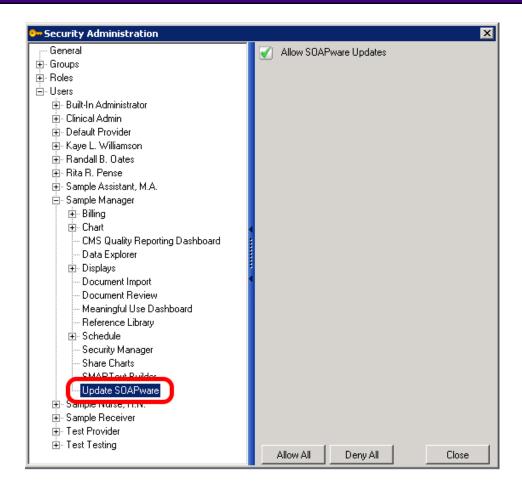
The automatic update feature will allow users to be notified of and perform updates through a simple, automatic update process on each computer. The auto-update feature will be available following the installation of SOAPware 2012.

What are Automatic Updates?

From time to time, SOAPware will release updates that contain valuable new features, bug fixes and performance improvements to SOAPware. After a site has updated to SOAPware 2012, they will begin to receive these valuable updates through the new Automatic Update feature.

The automatic update feature allows users to be notified, upon launching SOAPware, that a new update is available. The user will then have the ability to either install the update or wait until later to install the update.

Security Roles for Automatic Updates



The following user Roles will have access to receive notification of and initiate a SOAPware update by default.

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- Security Administrator
- Clinical Administrator

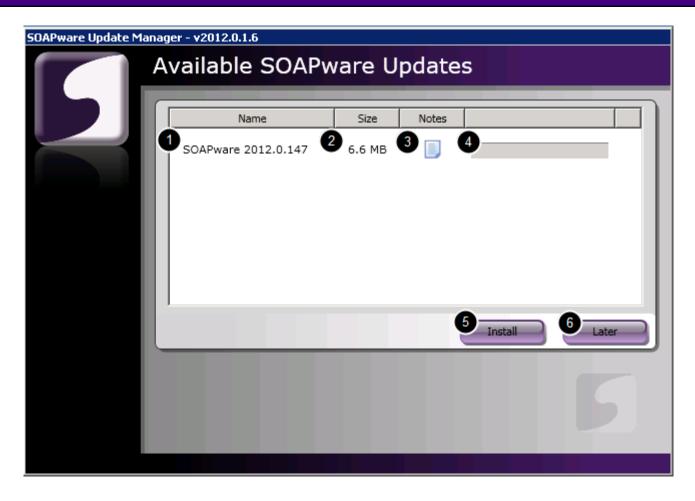
All other Roles will not have access to receive notification or initiate an update by default. However, there is a security setting that can be granted to allow any User, Role or Group to receive notification of an available update and access to initiate the update. This security setting can be edited by going to Tools > Security > and is titled "Update SOAPware" (see screenshot above).

Log In to SOAPware



To receive warning of an Automatic Update, the user with security for "Update SOAPware" enabled, will first log into SOAPware.

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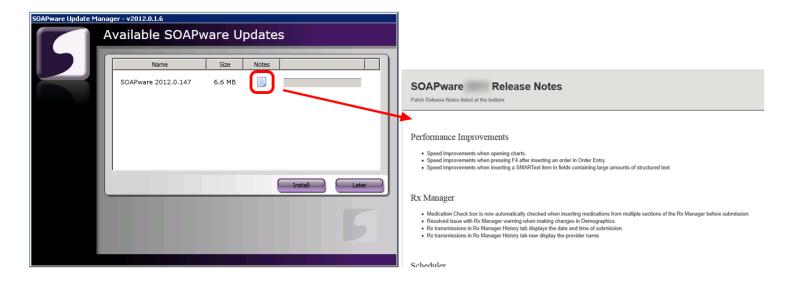


When a new update is available for SOAPware, all users that have the "Update SOAPware" security privileges will be presented with the SOAPware Update Manager seen in the screenshot above.

- 1. **Name:** this column will display the name and version number of the available update.
- 2. **Size:** this column will display the size of the available update. Most updates will be much smaller than a typical SOAPware installer, therefore the download and installation of the file will be much quicker than a SOAPware update has been in the past.
- 3. **Release Notes:** this icon will allow the user to view a list of release notes for the update.
- 4. **Progress Bar:** once the update has been initiated, the progress bar will display the progress of download and installation.
- 5. **Install:** clicking the Install button will initiate the download and installation of the update.
- 6. **Later:** if the user does not wish to install the update at the current time, the Later button may be selected.

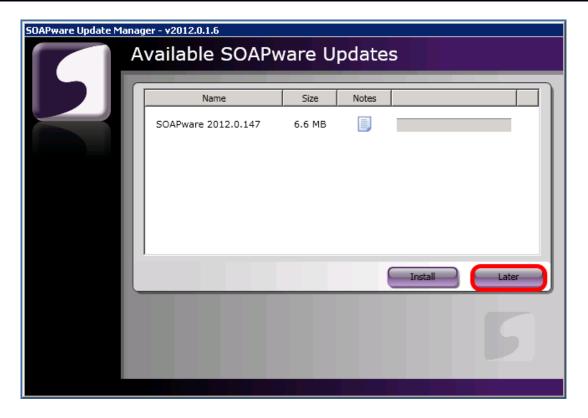
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Viewing Release Notes



To view a detailed list of release notes, including all new features, bug fixes and performance improvements, Click the **Release Notes** icon. Clicking this icon will open the users web browser in order to display the release notes associated with the update.

Choosing to Install Later

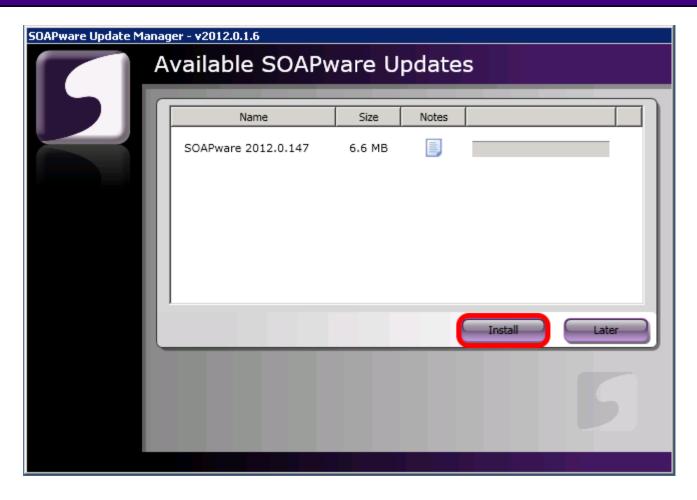


If the user does not wish to install the update at the current time, Click the Later button. When the Later button is clicked, the SOAPware Update Manager will be closed and SOAPware will continue to open with the users existing version.

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Next time that SOAPware is launched the user will again be presented with the SOAPware Update Manager.

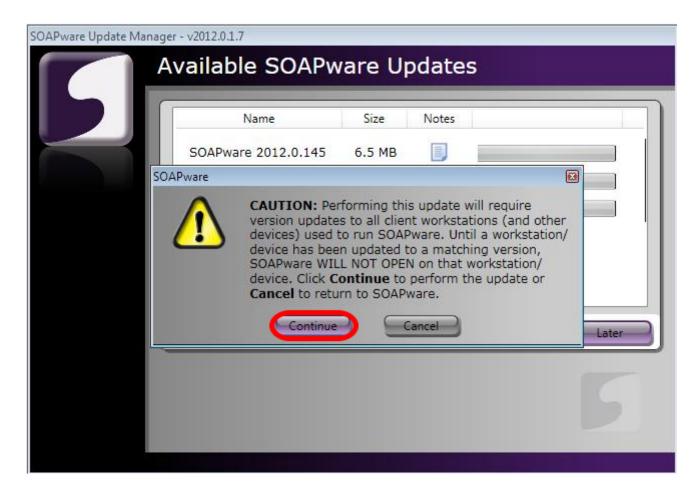
Installing the SOAPware Update



Before running the update, ensure that all SOAPware users have logged off and exited SOAPware. Once the authorized user is ready to install the update, Click the **Install button.** You must be logged onto the computer as a PC Administrator in order to perform the update.

IMPORTANT: The SOAPware database will also be updated during the installation process. Therefore it is very important to ensure that all users on the network log off and exit SOAPware prior to installing the update.

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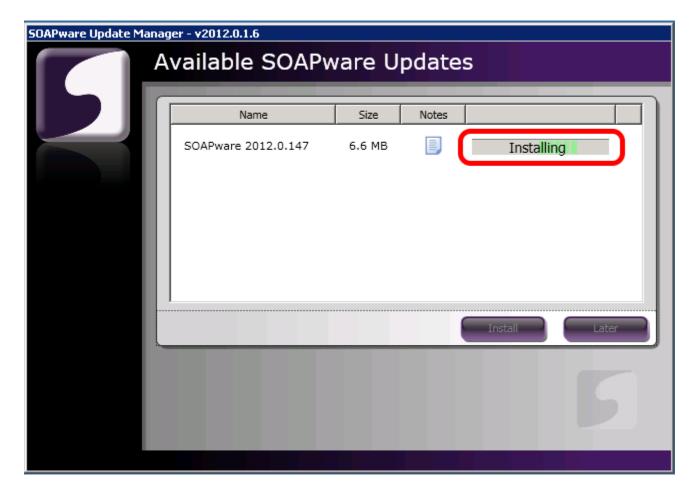


After clicking Install, the user will be notified that performing this update will require version updates to all clinic workstations that are used to run SOAPware.

Click the **Continue button** to perform the update.

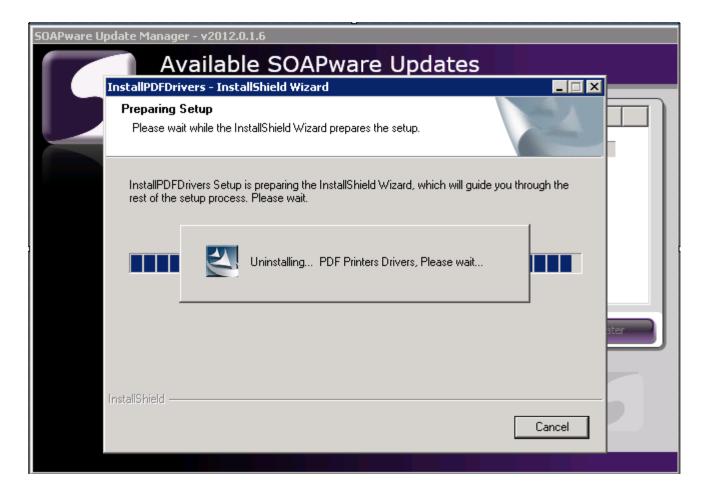
Click the Cancel button if you wish to cancel the update and log in to your current version of SOAPware.

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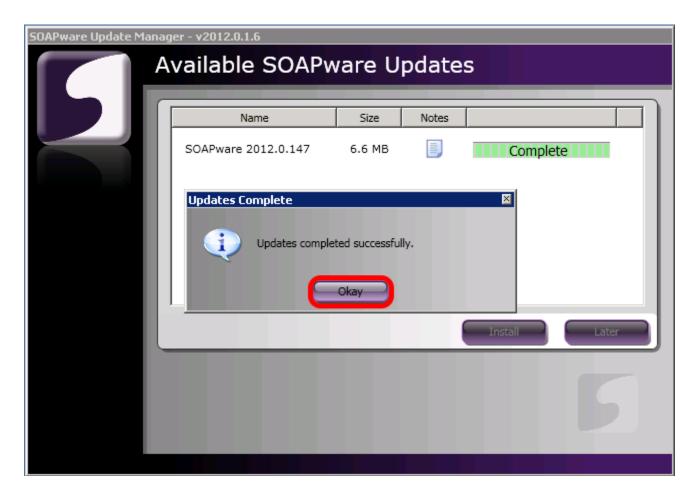
Once you have decided to install, the download and installation process will begin. The progress will be displayed in the Update Manager progress bar.

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As the installation runs, various windows will pop up to complete the installation process. The user will not have to click any additional buttons while the installation runs.

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Once the installation is finished, a dialog will be presented stating that the update has completed successfully.

Click the Okay button to close the Update Manager window and continue logging into SOAPware.

Update All Workstations



All other workstations within the clinic must also be updated after the initial installation.

The next time ANY SOAPware user logs in to a computer that contains the older version of SOAPware, they will be presented with a dialog to warn them that their version is out of date and the update must be installed (see screenshot above).

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Click OK, then click the Install button to run the update for each workstation within the clinic. Users will have to be logged onto the computer as a PC Administrator in order to perform the update.

Note: If the Later button is clicked, the program will exit. Users will not be able to log into SOAPware until the update has been installed.

Auto Updates Video

If you would like to view a quick video on the new SOAPware Automatic Updates, please click the following link: **New SOAPware Automatic Updates**

Updating SOAPwareXchange, SOAPwareXchangeHL7 & DataManager

SOAPwareXchange, SOAPwareXchangeHL7 and Data Manager must continue to be updated using the same installation process that has been used in the past. For installation instructions, please click on the appropriate link below:

- SOAPwareXchange
- SOAPwareXchangeHL7
- Data Manager

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Installation Guides for Optional EMR Enhancements

Installation Guides - 67 SOAPware, Inc.

SOAPwareXchange and SOAPwareXchangeHL7 Installation Guide

This lesson is a brief introduction to installing both SOAPwareXchange, and SOAPwareXchangeHL7. The Users Guides for each are also listed below.

SOAPwareXchange Users Guide

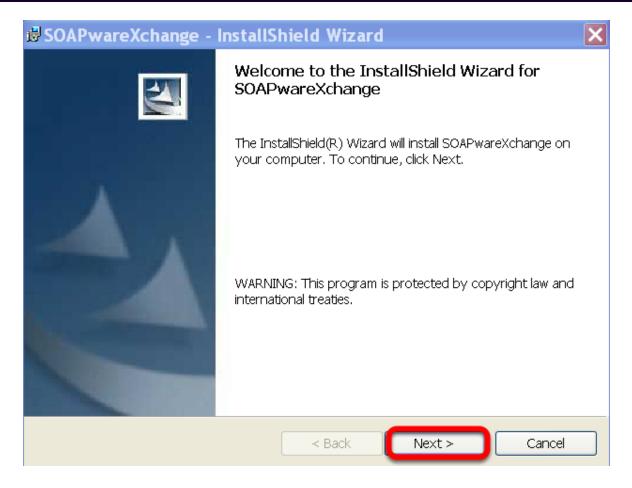
SOAPwareXchangeHL7 Users Guide

Begin Installation

Before starting the SOAPwareXchange or SOAPwareXchangeHL7 installer, log in to the computer using the Administrator account. If you do not have access to the Administrator account, please contact your Network Administrator.

If you are installing on Windows Vista or Windows 7, you will need to right click on the install file and choose "Run as Administrator."

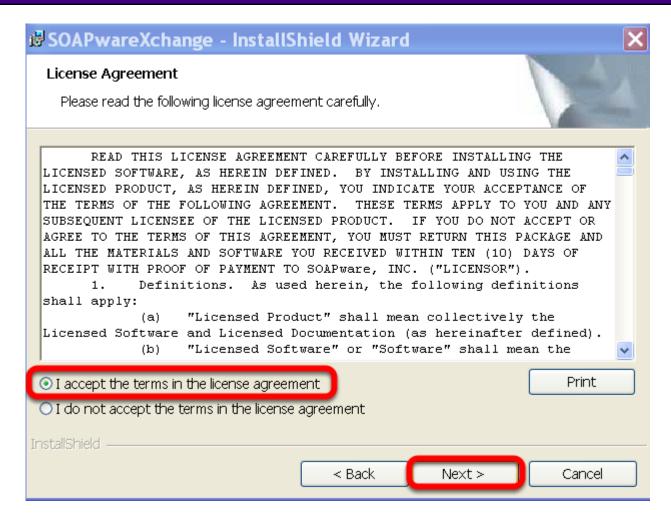
Welcome Screen - Click Next



Click Next to proceed.

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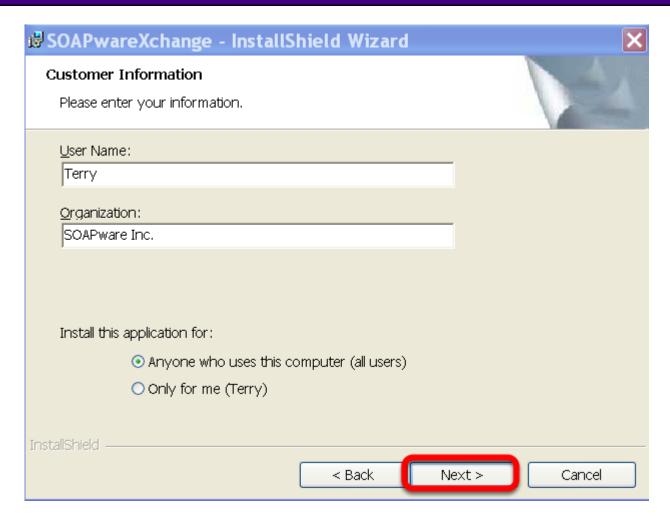
License Agreement - Read and choose to Accept the terms



Read the license agreement and if you accept the license, click I accept the terms in the license agreement and click Next.

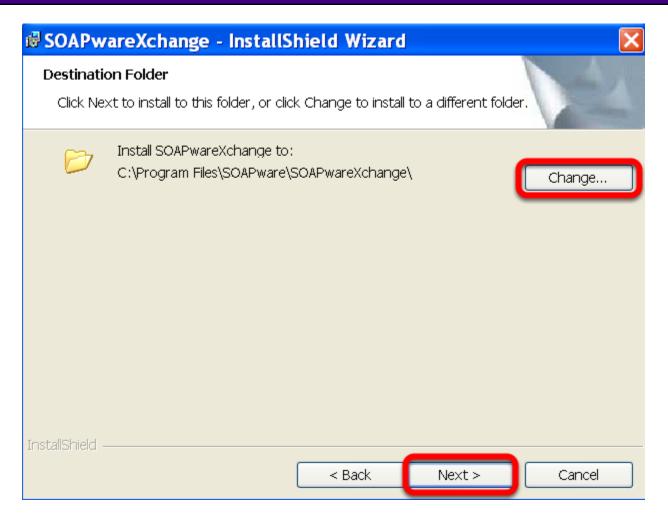
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Customer Information - Supply information and click Next



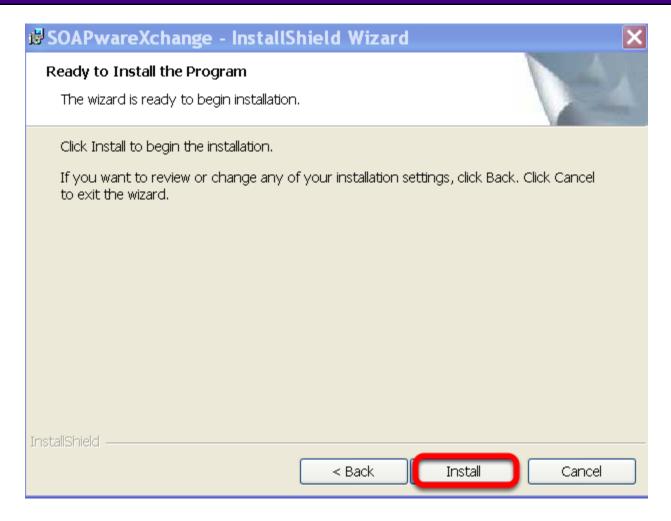
Enter your information and Click Next.

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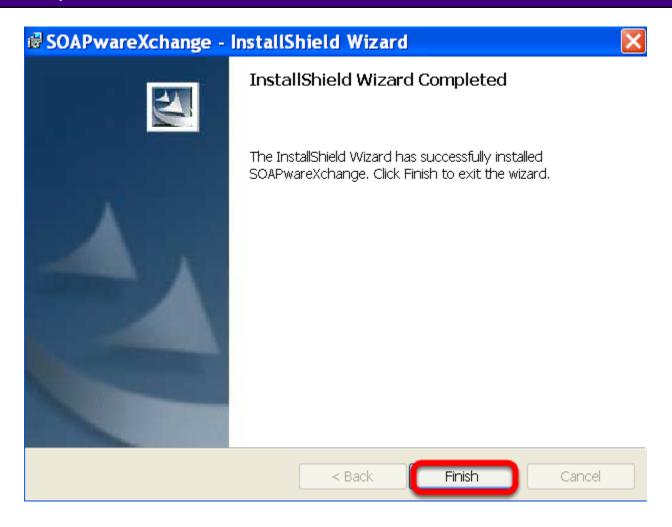
Choose the default install location or if you want to change this, click Change, select a new location, then click Next.

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Click Install to finish the installation.

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Finally click Finish to complete the install process.



Once complete, you can run the program from Start > Programs > SOAPwareXchange (or SOAPwareXchange HL7). You will need to enter the same user ID and password as you would when logging into SOAPware. Refer to the users guides above for more details on setup and use.

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SOAPwareXchange User Guide

This lesson will provide a brief walk through for setting up and using SOAPwareXchange. For help installing, visit the install guide.

SOAPwareXchange Defined

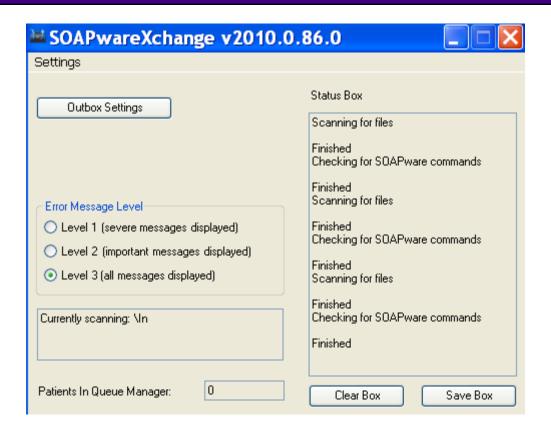
SOAPwareXchange is an add-on module that allows communication between SOAPware and other systems. It is a bidirectional interface, meaning it will allow information to be imported from another system, such as a PMS or billing software, and allow information to be exported out of SOAPware to update other systems. Not all interfaces will utilize both sides of Xchange. Many will only be setup to allow information to import into SOAPware. The basic setup below shows how to get SOAPwareXchange ready to allow the import of information.

If you wish to learn more about SOAPwareXchange and its capabilities, visit the SOAPwareXchange white paper.

If you wish to see more information on SOAPwareXchange click here.

**Note: The following steps are applicable to SOAPware 2011, despite the difference of versions shown in the following screen shots.

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The SOAPwareXchange must be open in order to process files. You will also have to Click Start > Programs > SOAPwareXchange, in order to allow results to process into SOAPware. This requires you to enter your user ID and password, just as you would with SOAPware. If you turn off the computer where the Xchange is located, you must open it again once the computer has been restarted.

*Note: Both the SOAPwareXchangeHL7 and SOAPwareXchange may be setup to auto-start by following the instructions here.

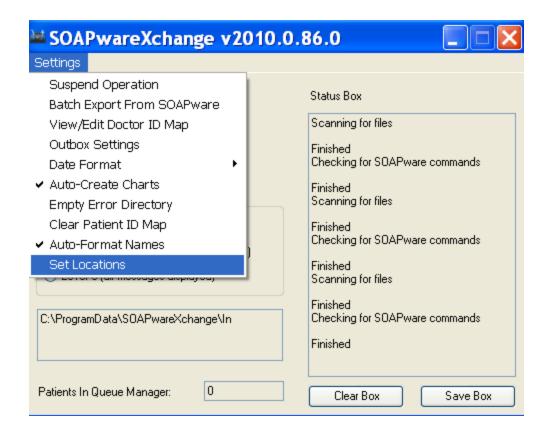
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Set the Xchange folders



If this is the first time SOAPwareXchange has been installed, the default location will be set as it is above. The default location is C:\ProgramData\SOAPwareXchange. If you are updating the SOAPwareXchange and it has been installed previously, it will be set to the location used before.

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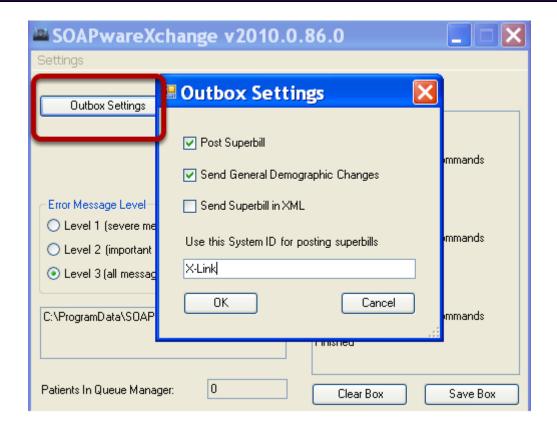


You may also set the location where the Xchange folders are located manually by going to Settings > Set locations. There you can select the folder where it will build the directory for exchanging files.

You will need to contact your Practice Management software support to complete the setup.

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Technical Setup of SOAPwareXchange - Outbox Settings



If you will be exporting information out of SOAPware to another program, you will need to setup the Outbox Settings.

The System ID relates to the Sender ID from an inbound file. The System ID should be the first field in an inbound file.

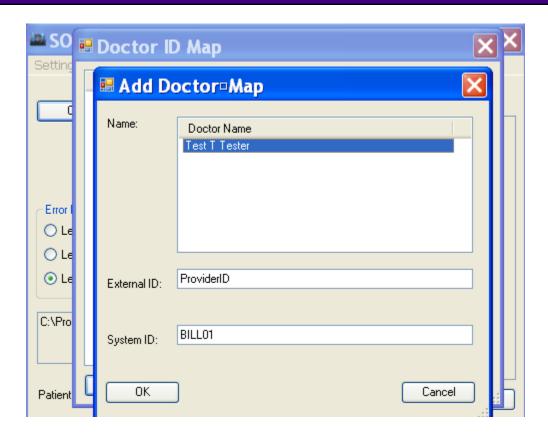
Sample Record Header

Sample Record Header

SILLO1, Station 1,19970120,145322, Optional text describing who/what/when/where<CR><LF>

Note: You should only select to Send Superbill in XML if you have confirmed with your PMS or third party vendor that they will accept this format.

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The Doctor ID Map is used to map external Doctor ID's to the ID's used internally by SOAPware.

To add a new entry to the map-

- 1. Click on the "New Map" button.
- 2. Select the doctor's name from the first list box, then type in the external ID and the billing system ID.*
- 3. Click on OK to accept the changes, or Cancel to discard them.

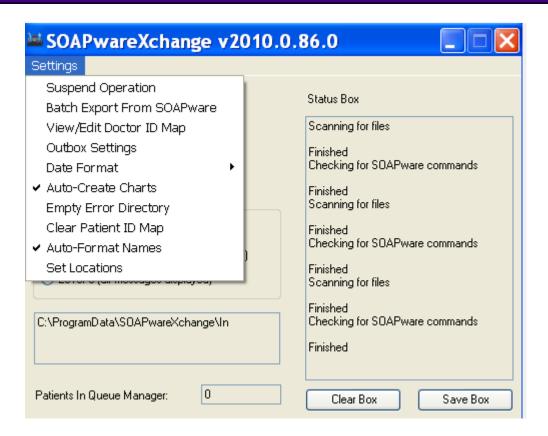
Edit an Existing Map Sample General Demographics Segment GDEM,LastName,FirstName,MiddleInitial,Title,Suffix,Steert1,Street2,City,State,Zip, HomePhone,WorkPhone,Email,Sex,MartialStatus,Birthdate,,ChartNumber,SocialSecurityNumbertProvidertD<CR><LF>

1. Click on the doctor's name in the entry you wish to modify, and Click on "Edit". The Change ID box will appear. In this box are the current billing system and external ID.

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- 2. Change either or both of them, and click OK to accept or Cancel to discard.
- *The System ID again relates to the Sender ID from an inbound file, and the External ID relates to the Provider ID.

Other Settings



Here is a brief explanation of the settings menu...

Suspend Operation - Stops the Xchange from processing files.

Batch Export from SOAPware - Will preform a batch export of all patient demographics to a .csv file. *The Xchange will NOT currently export patient insurance.

View/Edit Doctor ID Map - Allows you add/modify doctor ID mappings. *Used for bidirectional interfaces.

Outbox Settings - Allows you to select what information will be exported from SOAPware. *Used for bidirectional interfaces.

Date Format - Allows you select the expected format of dates sent from other systems. Typically this will remain YYYYMMDD.

Auto-Create Charts - When checked, allows the auto-creation of charts not already in SOAPware

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from other systems.

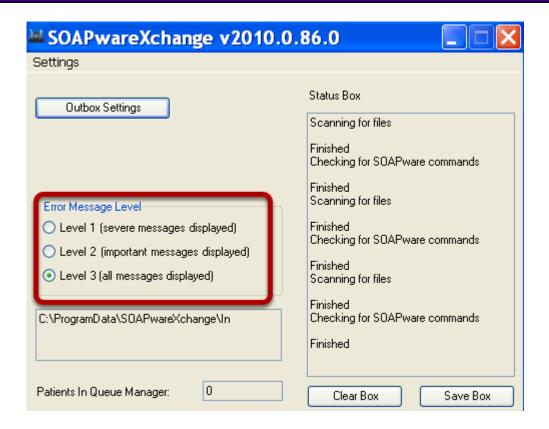
Empty Error Directory - Empties the Error directory, allowing you to identify recent errors easier.

Clear Patient ID Map - Clears all patient mappings from the SOAPware database.

Auto-Format Names - Allows the names in SOAPware to be formatted from your PMS/billing software.

Set Locations - Allows you to specify the location where files will be exchanged.

Error Message Level



Here you can indicate what type of messages SOAPwareXchange will display based on importance.

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SOAPwareXchangeHL7 User Guide

In this lesson you will find a brief walk through for setting up and using the SOAPwareXchangeHL7.

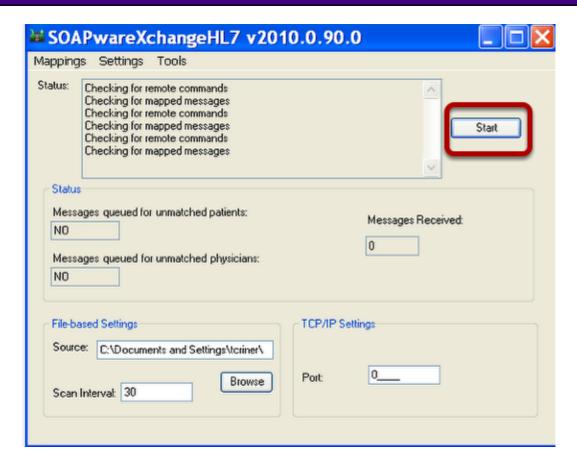
Installing SOAPwareXchangeHL7

For help installing, watch the install video or visit the install guide.

If you wish to see more information on SOAPwareXchange click here.

**Note: The following steps are applicable to SOAPware 2011, despite the difference of versions shown in the following screen shots.

Ensure the SOAPwareXchangeHL7 is Open and Started

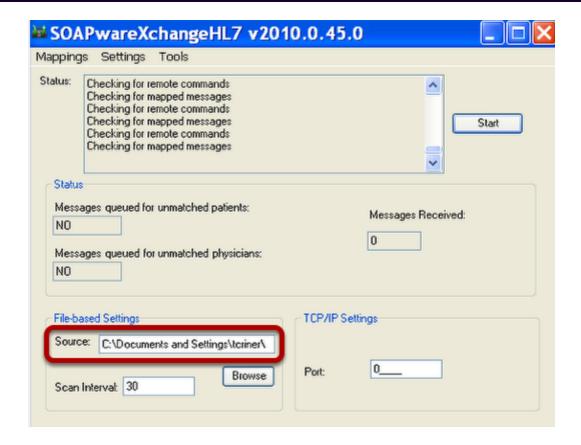


The SOAPwareXchangeHL7 must be open in order to process results. You will also have to Click Start > Programs > SOAPwareXchange HL7, in order to allow results to process into SOAPware. This requires you to enter your user ID and password, just as you would with SOAPware. If you turn off the computer where the HL7 is located, you must open it again once the computer has been restarted.

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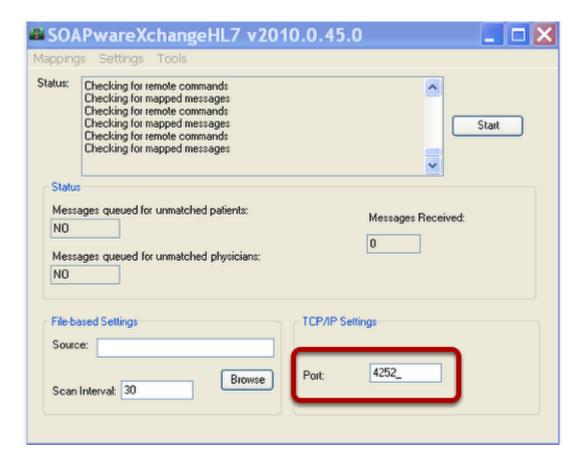
*Note: Both the SOAPwareXchangeHL7 and SOAPwareXchange may be setup to auto-start by following the instructions here.

Ensure the Source Folder is Set Correctly



The majority of HL7 interfaces will be via a FTP connection, meaning that the participating lab(s) will be delivering results to a shared folder, and this is often the same machine that the SOAPwareXchangeHL7 is installed on. Make sure the Source is selected and the port is set as 0. If you are not sure where the results are being delivered, contact your lab's technical support.

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Afew labs will be delivering results via TCP/IP rather than to a shared folder. In this case, the source will be left blank and a port # will be indicated. If you are not sure how the results are being delivered, contact your lab's technical support.

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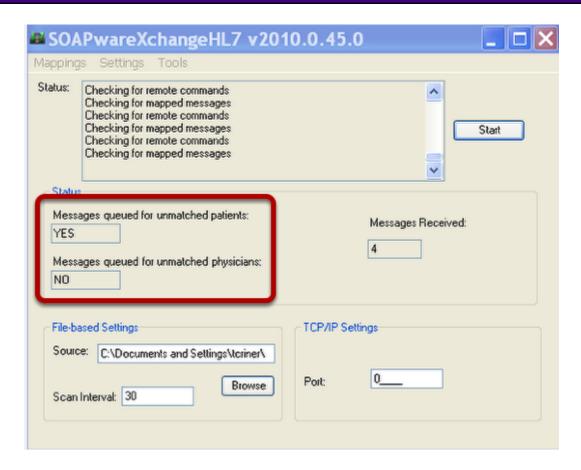
Check for Unrecognized Messages



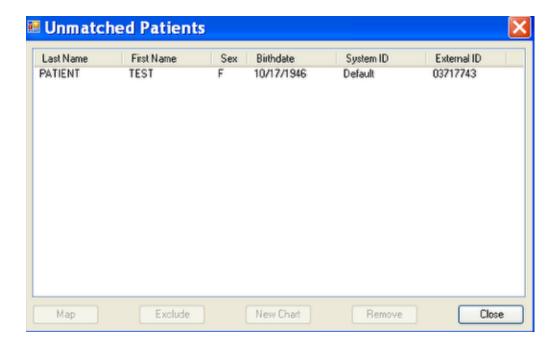
Often times if labs are not showing up in SOAPware, they are in Unrecognized Messages. In SOAPwareXchangeHL7, go to Mappings > Edit/View Unmapped messages. If this is the case, it will be necessary to contact SOAPware Support to obtain a modified file that is necessary to allow reports to process.

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Check for Unmatched Patients/Physicians

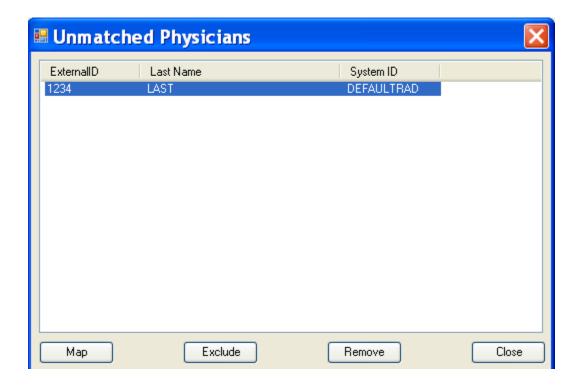


Also watch for unmapped patients/physicians.



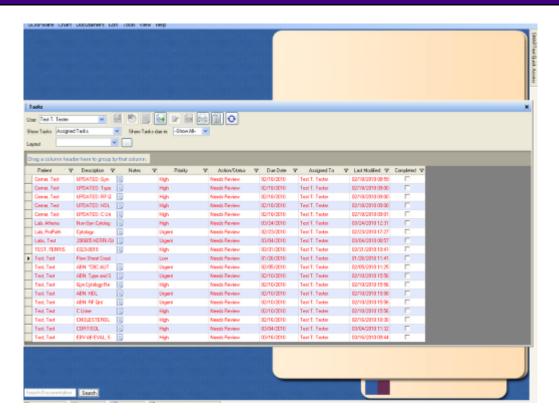
If either say YES, you must match them under Mappings > Edit/View Unmatched Patients, as shown above.

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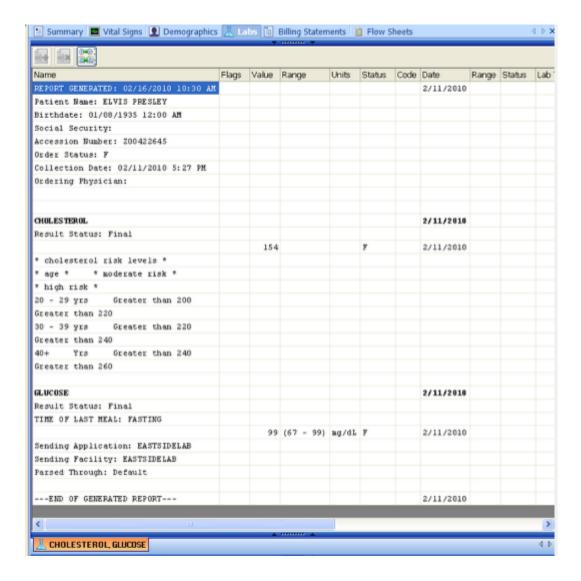
Select the unmatched item, Click Map and Select the patient from the chart rack.

Review the Report in SOAPware



Once processed, the provider will be assigned a task list item from where they can open the patients chart and view the report.

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Above is an example of a generic lab report. While most results will be pulled into the Labs report section, some may also pull results into the Radiology or Pathology sections.

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SOAPwareXchange and SOAPwareXchange HL7 Command Line

Both SOAPwareXchange & SOAPwareXchangeHL7 can now be invoked from the command line. Place the script in a Batch file & setup a scheduled task to run at startup (etc), create a logon script, or place in the Start up Folder.

Usage

For SOAPwareXchange:

Command format:

SOAPwareXchange -ID soapware -PW soapware -Server localhost -Port 5432

For SOAPwareXchangeHL7:

Command format:

SOAPwareXchangeHL7.exe -ID soapware -PW soapware -Server localhost -Port 5432 -Drive C -Path "Program Files\SOAPware\SOAPwareXchangeHL7\Inbox" -Interval 5 -Listen 0

Glossary Terms

ID - user ID for logging into SOAPware

PW - password for logging into SOAPware

Server - db server

Port - db port number

Drive - the drive of the location to scan for incoming results

Path - the path to the location to scan for incoming results, minus the drive letter

Interval - the scan interval

Listen - the port to listen on

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^{**}Note: The quotes around the path, are necessary due to the space in the Program Files.