

Updates

Updates

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Pre-Update

What is your current version of SOAPware?

Select the version of SOAPware you're currently using so we can help you update your SOAPware.

What version of SOAPware are you currently using?

In SOAPware, go to Help, About SOAPware to check your current version.

Click on the version you are currently using below:

- [2010, 2011, 2012 or 7](#)
- [SOAPware Cloud Service \(SCS\) User](#) (*formerly SHS*)

Upgrade

This lesson walks you through updating your 2010, 2011 or 2012 version of SOAPware to the latest version.

Update Pre-Requisites

Update all SOAPware Programs

When the SOAPware system is updated, all computers running SOAPware, SOAPwareXchange or SOAPwareXchangeHL7 MUST be updated to the latest version. Data Manager should be updated in general, but check the the update lesson for Data Manager below for specific update instructions for Data Manager.

Plan an update time

NOTE: SOAPware cannot be used during the update process. The update process can take many hours.

It is always recommended to back up your database before updating SOAPware.

Check Hardware Recommendations

Click [here to check the recommended specs](#) for the latest version of SOAPware. For optimal use, ensure that your PC's in the office meet the recommended specifications and minimum hardware recommendations.

Note: The current version of Data Manager is 2012.0.1019.

7.0.5051

SOAPware CloudSync



SOAPware CloudSync is a new utility that transfers a QRDAI data file of a patients chart from SOAPware to SOAPware's Clinical Quality Measure calculation engine in order for users to obtain the CQM statistics.

Please click the following link for instructions on downloading and installing CloudSync: [Installing SOAPware CloudSync](#).

Installation Guides

Server

[SOAPware Data Manager Update Guide](#)

[SOAPware CloudSync](#)

Client

[SOAPware Update Guide](#)

Add-Ons

[SOAPwareXchange Update Guide](#)

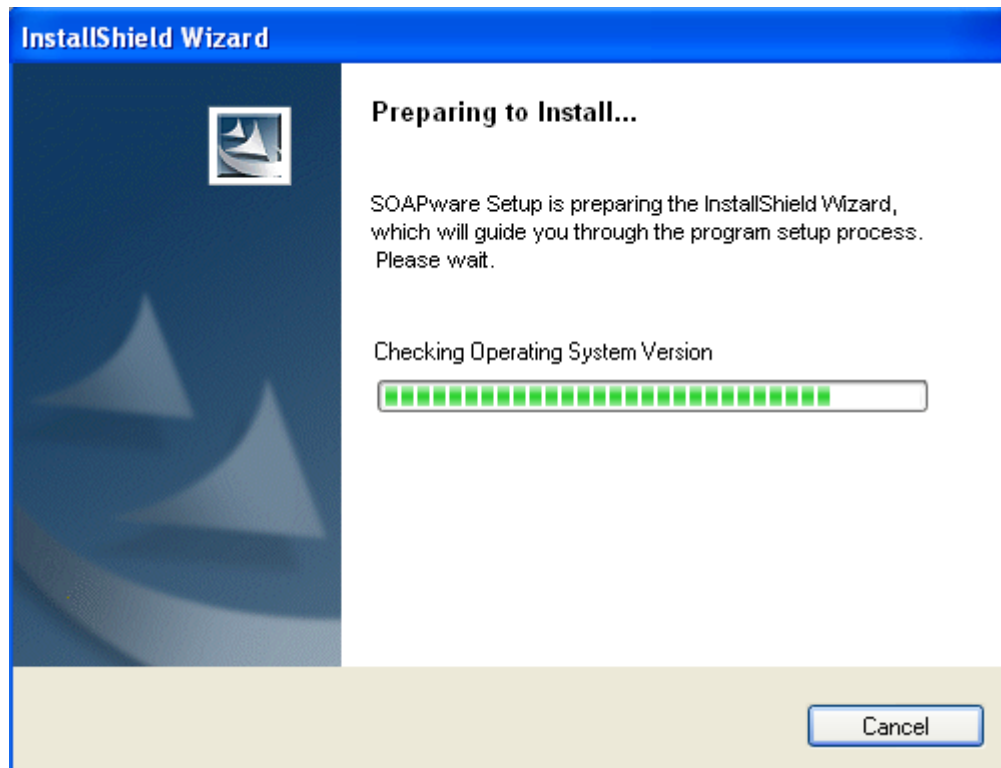
[SOAPwareXchange HL7 Update Guide](#)

Update Instructions

Update SOAPware

This lesson will describe how to update SOAPware for an existing customer on V5, 2008 or 2010.

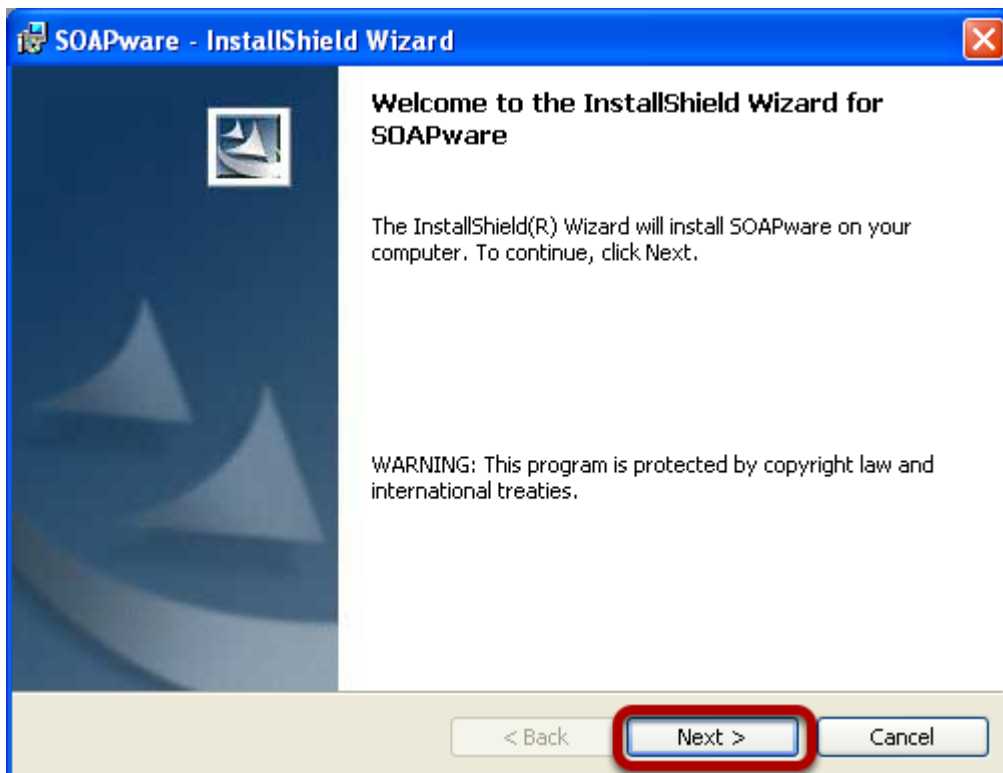
Install SOAPware



Run the SOAPware install file from the Intro to Updating lesson.

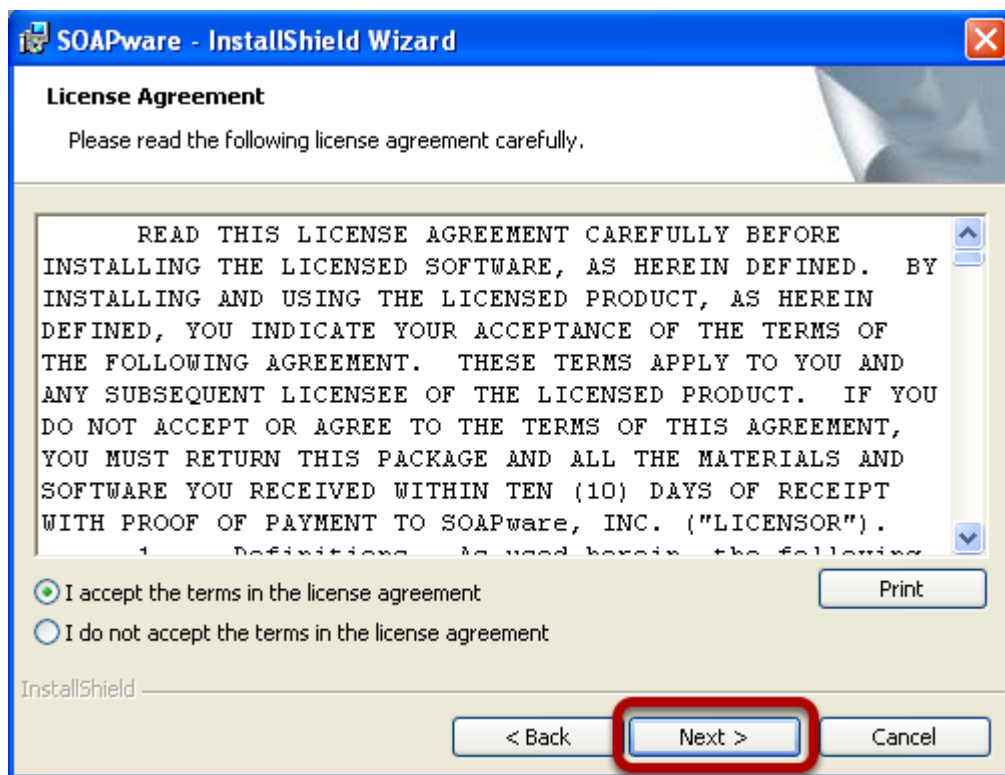
NOTE: Windows Vista, 7 or Server 2008 users may need to right click on the install file and choose "Run as Administrator".

Welcome Menu - Click Next



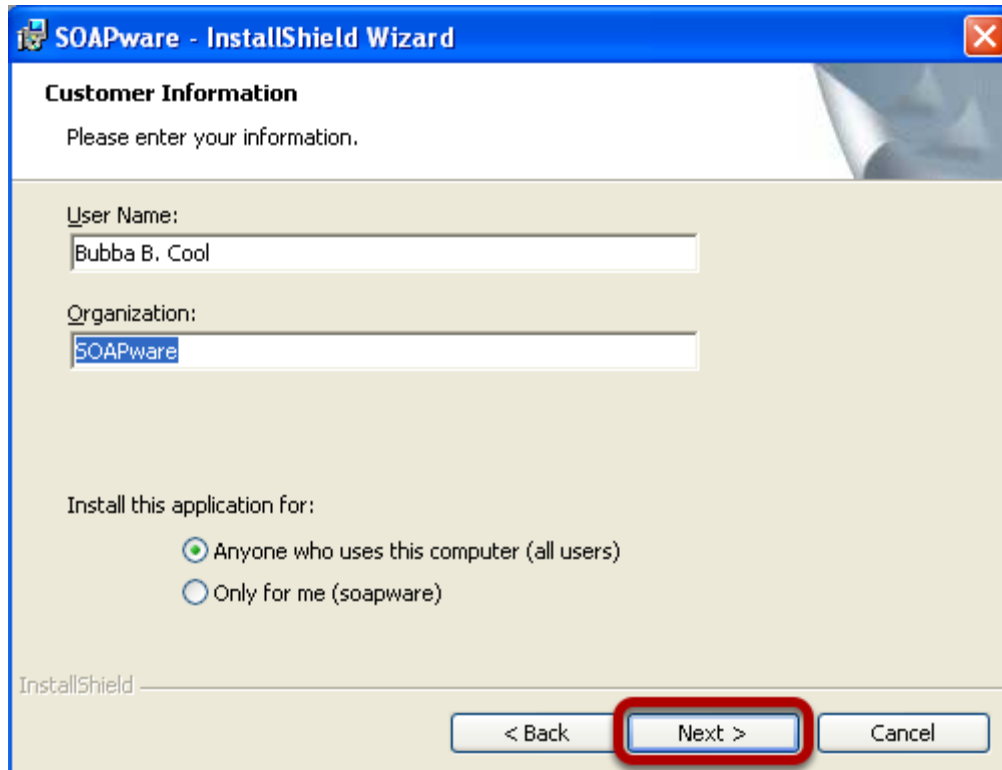
Click Next to proceed.

License Agreement - Click I Accept and Next



If you accept the terms of the license agreement, click I accept the terms and click Next.

Customer Information - Fill out and Click Next



The image shows a screenshot of the 'SOAPware - InstallShield Wizard' window. The title bar is blue with the text 'SOAPware - InstallShield Wizard' and a close button. The main window has a light beige background. At the top, it says 'Customer Information' followed by 'Please enter your information.' Below this, there are two text input fields. The first is labeled 'User Name:' and contains the text 'Bubba B. Cool'. The second is labeled 'Organization:' and contains the text 'SOAPware'. Below these fields, there is a section titled 'Install this application for:' with two radio button options. The first option is 'Anyone who uses this computer (all users)' and is selected with a green dot. The second option is 'Only for me (soapware)' and is not selected. At the bottom of the window, there is a status bar that says 'InstallShield'. To the right of the status bar are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a red rectangular border.

SOAPware - InstallShield Wizard

Customer Information

Please enter your information.

User Name:
Bubba B. Cool

Organization:
SOAPware

Install this application for:

☒ Anyone who uses this computer (all users)

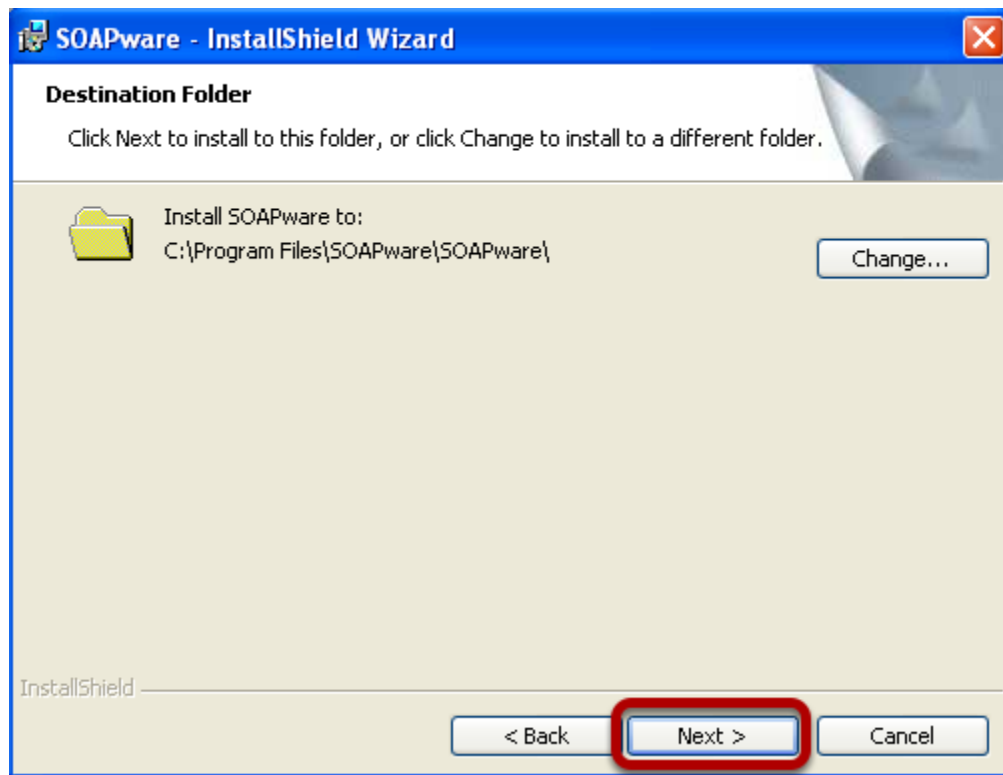
☐ Only for me (soapware)

InstallShield

< Back **Next >** Cancel

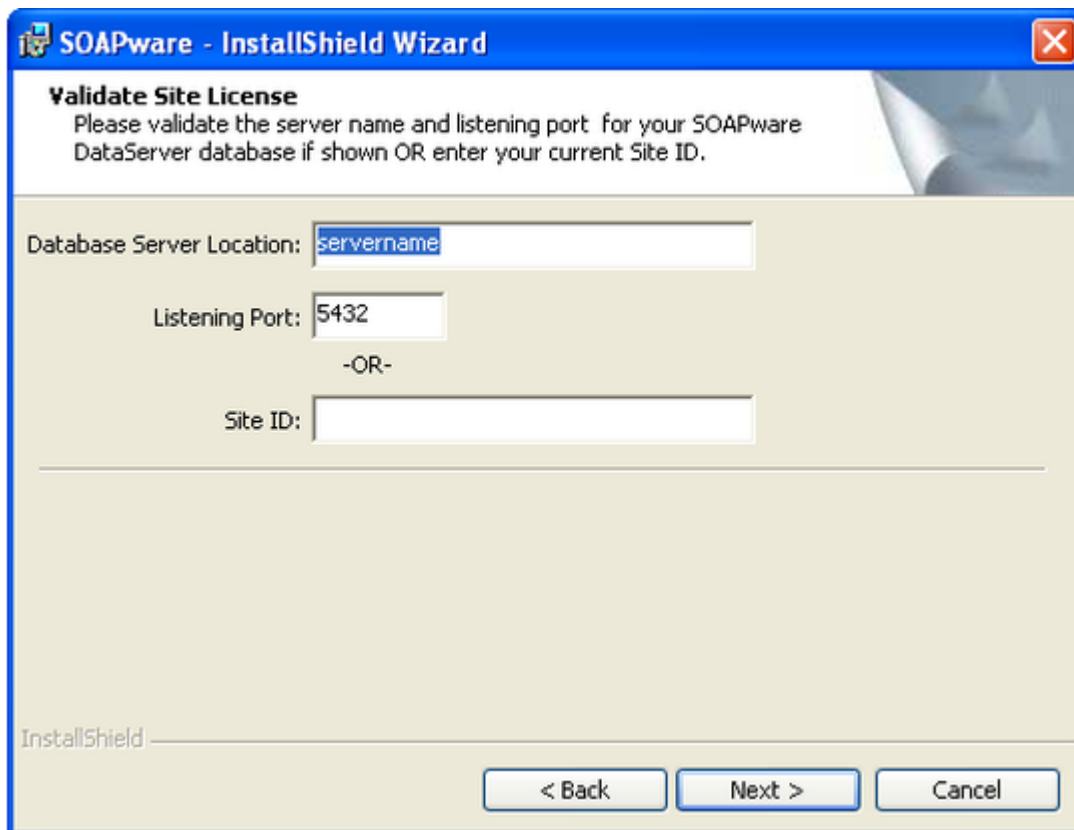
Fill out the user name and organization. If you want all users to be able to use SOAPware on this computer choose Anyone who uses this computer (all users). Then click Next.

Destination Folder - Choose location and Click Next.



If you want to install the SOAPware program files to another location, click Change to do so. Click Next to move to the next step.

Validate Site License



The image shows a Windows-style dialog box titled "SOAPware - InstallShield Wizard". The main heading is "Validate Site License". Below the heading, the text reads: "Please validate the server name and listening port for your SOAPware DataServer database if shown OR enter your current Site ID." The dialog contains three input fields: "Database Server Location:" with the text "servername" entered, "Listening Port:" with the text "5432" entered, and "Site ID:" which is empty. Between the "Listening Port" and "Site ID" fields is the text "-OR-". At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel". The "Next >" button is highlighted with a blue border. The "InstallShield" logo is visible in the bottom left corner of the dialog area.

SOAPware - InstallShield Wizard

Validate Site License
Please validate the server name and listening port for your SOAPware DataServer database if shown OR enter your current Site ID.

Database Server Location:

Listening Port:

-OR-

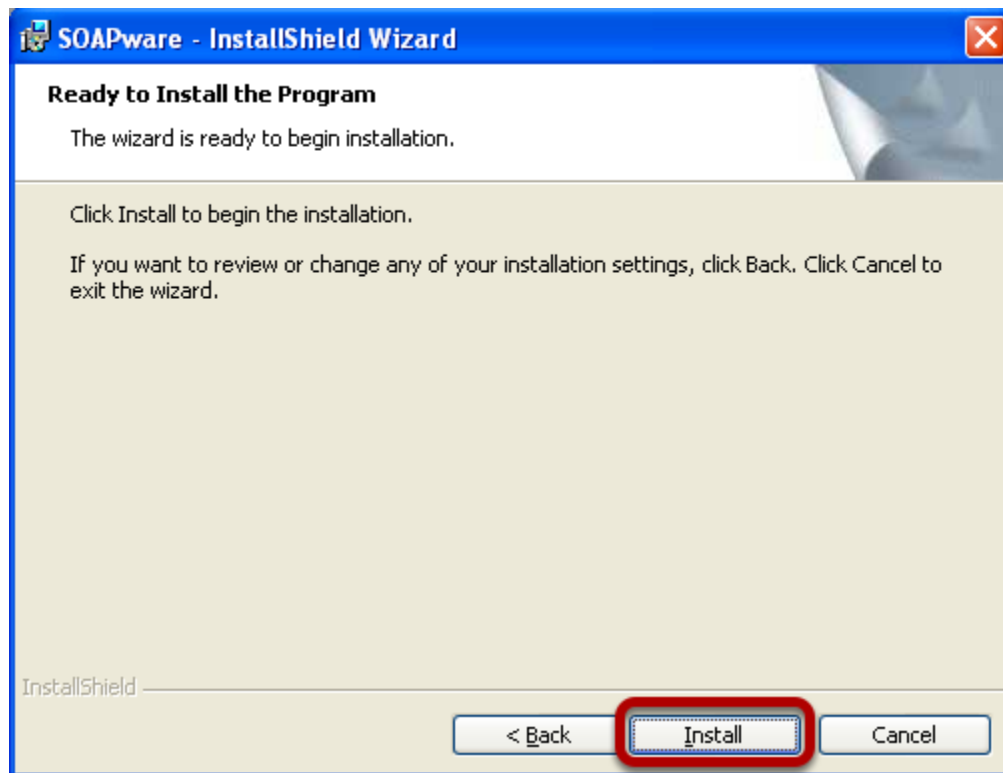
Site ID:

InstallShield

< Back Next > Cancel

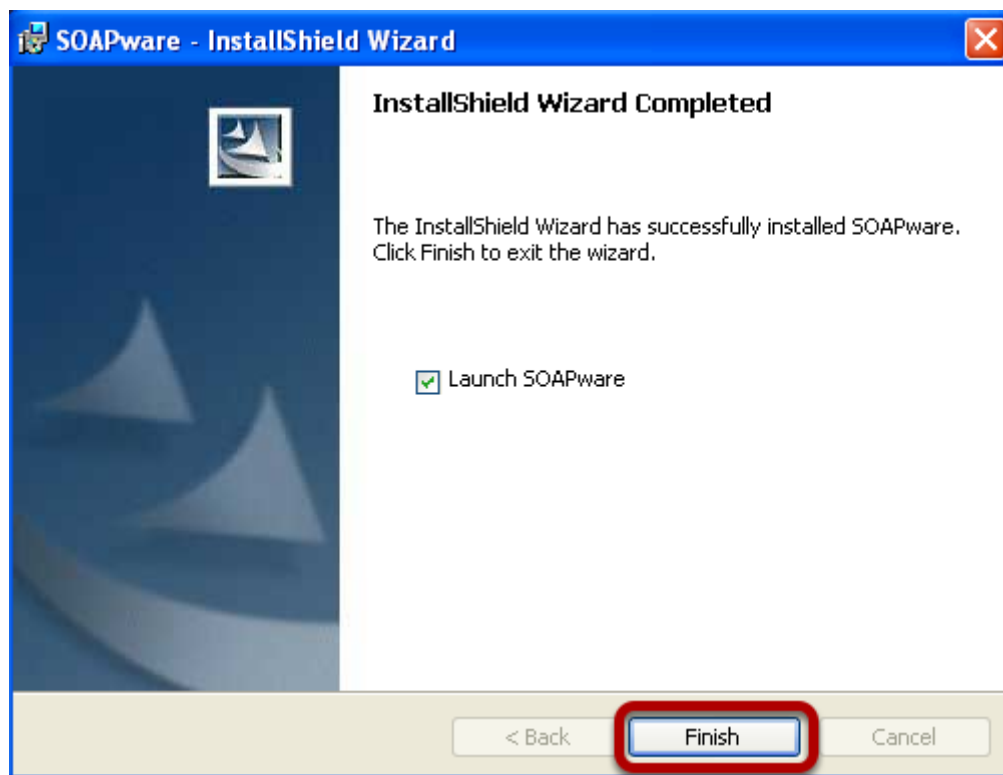
To validate your license, SOAPware will either connect to your database or you can supply your site ID that was sent upon initial installation of SOAPware. In the Database Server Location, type in the name of the computer that the SOAPware DataServer is installed to. If you have never logged into your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

Ready to Install



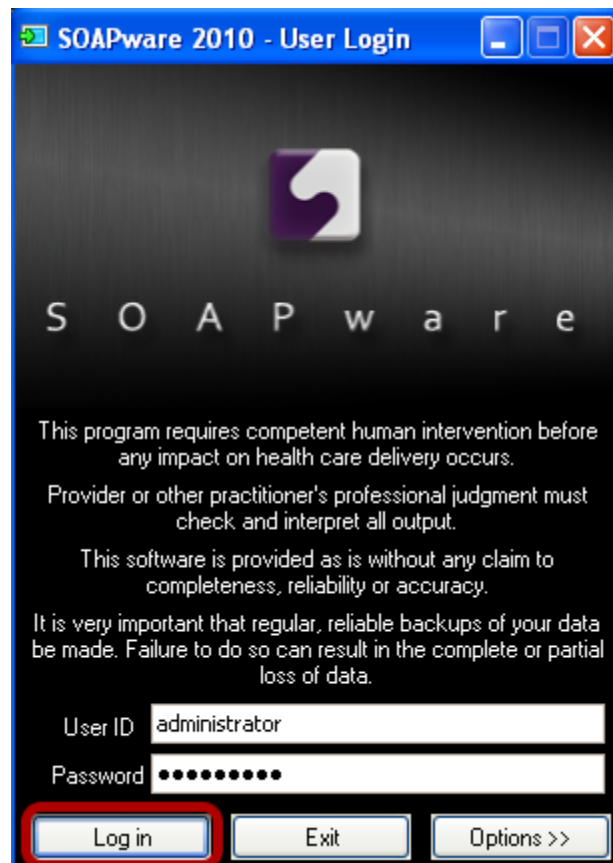
Click Install to begin the installation.

Finish Installation and Launch SOAPware



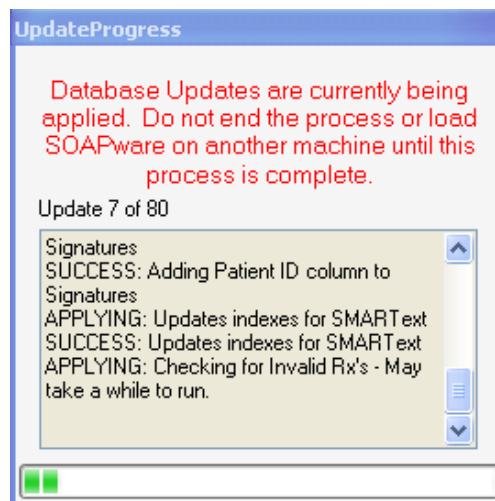
Click the check box beside Launch SOAPware and click Finish to complete the installation and open SOAPware.

Log in to SOAPware with the built-in administrator user



Type in the user ID of administrator and your administrator password. Click Log in.

Wait for Database Updates to complete



There may be database updates when you update versions of SOAPware. The number and time required to finish these updates will vary depending on your previous version of SOAPware and how large your database is. Updates can take hours to complete.

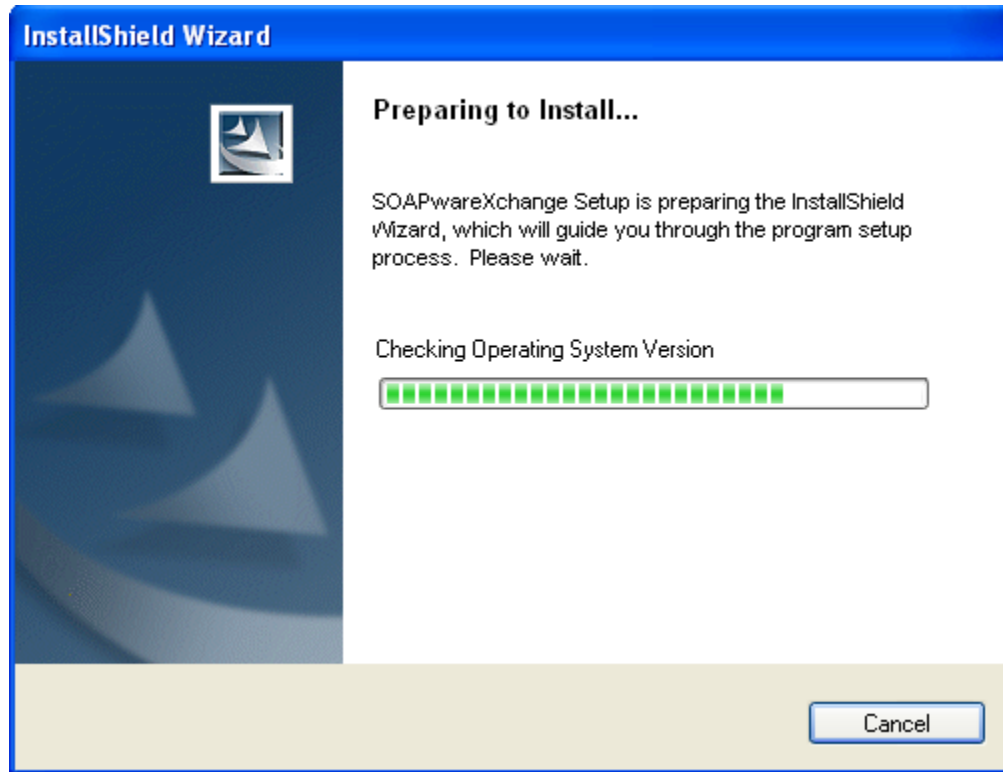
Update SOAPware on all other PCs using the same steps as above

Any SOAPware update requires all computers to be updated. The rest of the computers will not go through the previous database updates step like the first computer.

Update SOAPwareXchange

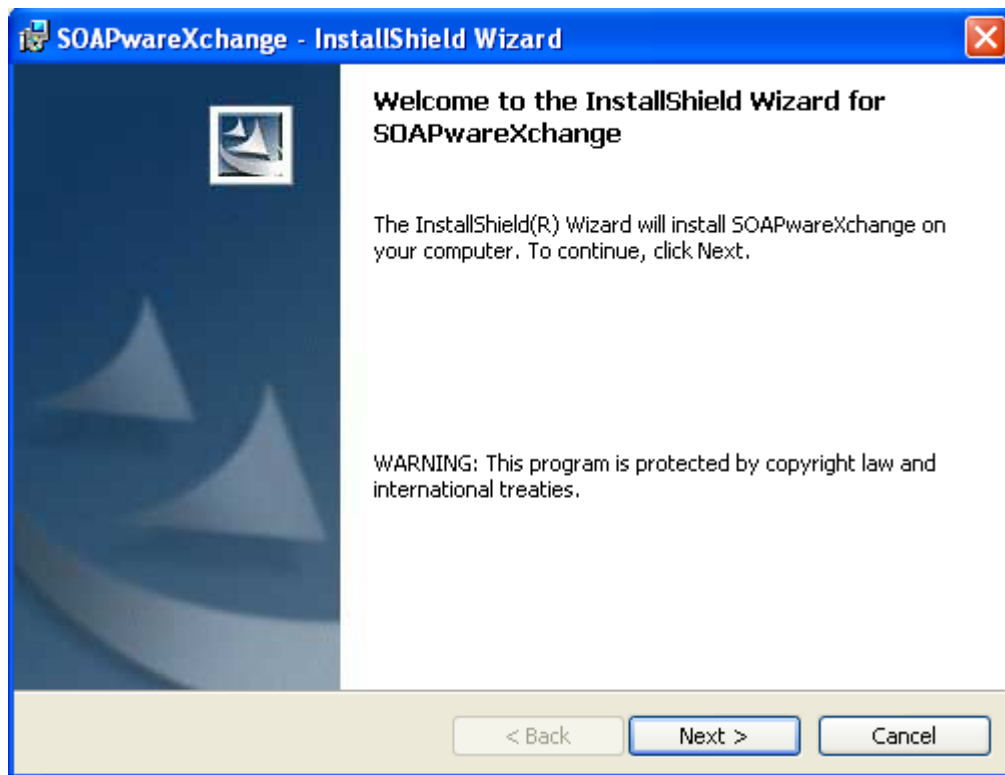
This lesson walks you through updating SOAPwareXchange. This assumes SOAPware has already been updated.

Install SOAPwareXchange



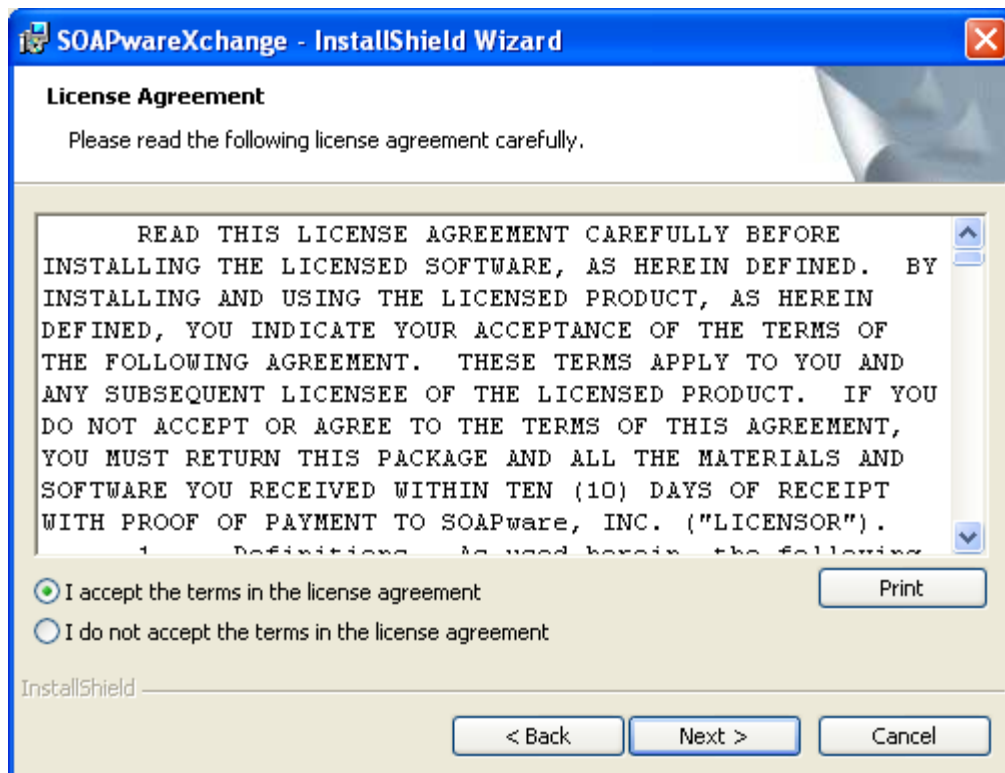
Run the SOAPwareXchange install file from the Intro to Updating lesson. SOAPwareXchange should only be installed on one machine, just install it on the computer it currently resides on. NOTE: Windows Vista, 7 or Server 2008 users may need to right click on the install file and choose "Run as Administrator".

Welcome Menu - Click Next



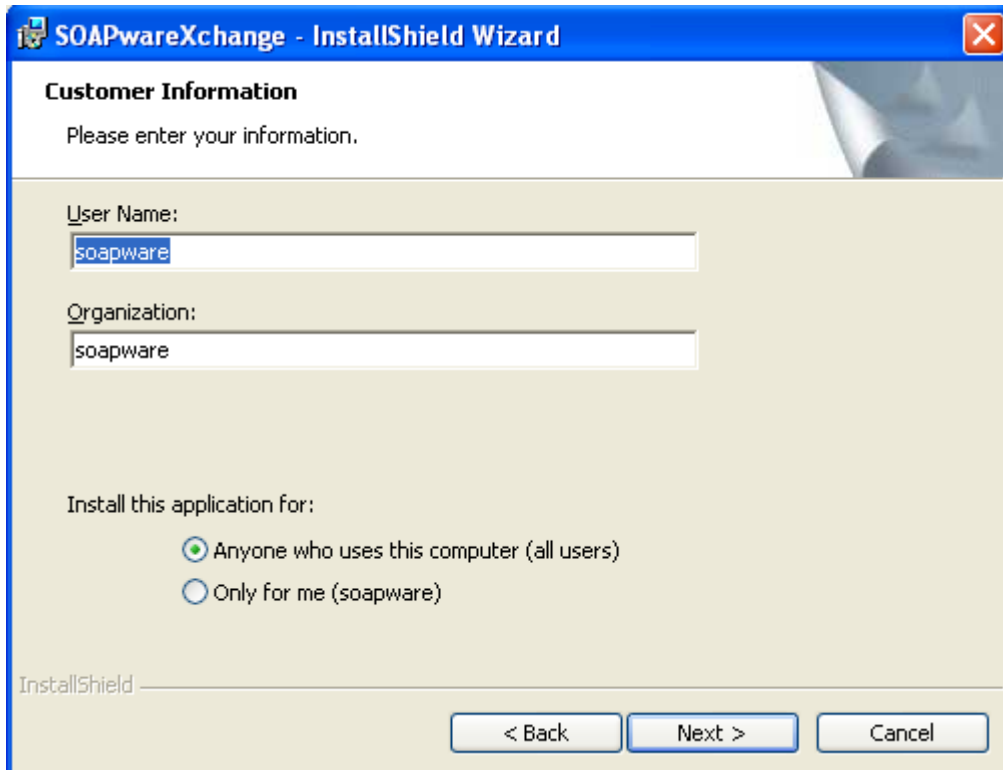
Click Next to proceed.

License Agreement - Click I Accept and Next



If you agree to the license agreement, click I Accept and Next to move on.

Customer Information - Fill out and Click Next



The image shows a Windows-style dialog box titled "SOAPwareXchange - InstallShield Wizard". The window has a blue title bar with a close button in the top right corner. The main content area is titled "Customer Information" and contains the instruction "Please enter your information." Below this, there are two text input fields. The first is labeled "User Name:" and contains the text "soapware". The second is labeled "Organization:" and also contains the text "soapware". Below these fields, there is a section titled "Install this application for:" with two radio button options. The first option, "Anyone who uses this computer (all users)", is selected with a filled radio button. The second option, "Only for me (soapware)", is unselected with an empty radio button. At the bottom of the window, there is a status bar that says "InstallShield" followed by a progress indicator. To the right of the status bar are three buttons: "< Back", "Next >", and "Cancel". The "Next >" button is highlighted with a blue border.

SOAPwareXchange - InstallShield Wizard

Customer Information

Please enter your information.

User Name:
soapware

Organization:
soapware

Install this application for:

☒ Anyone who uses this computer (all users)

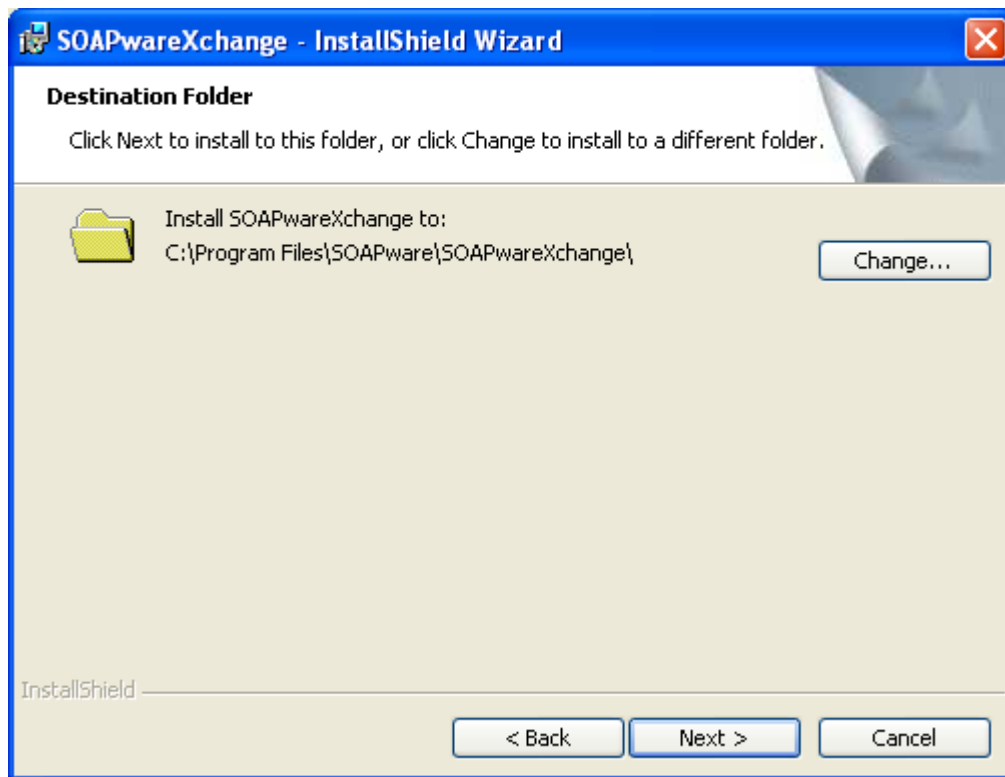
☐ Only for me (soapware)

InstallShield

< Back Next > Cancel

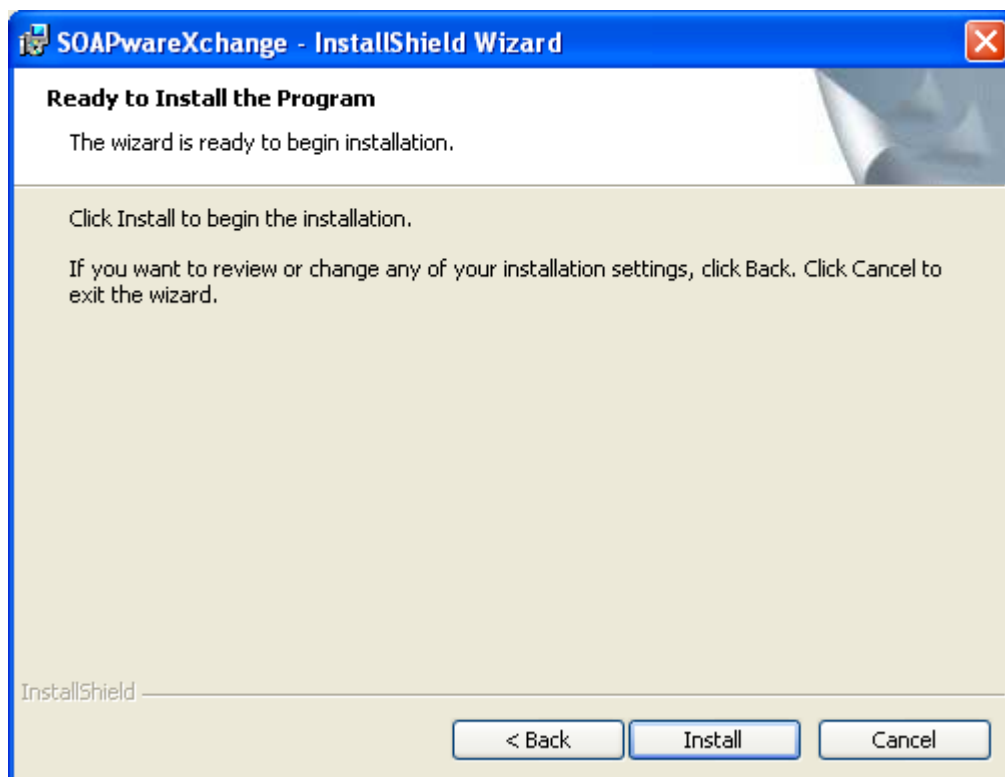
Fill out the user name and organization. If you want all users to be able to use SOAPwareXchange on this computer choose Anyone who uses this computer (all users). Then click Next.

Destination Folder - Choose location and Click Next



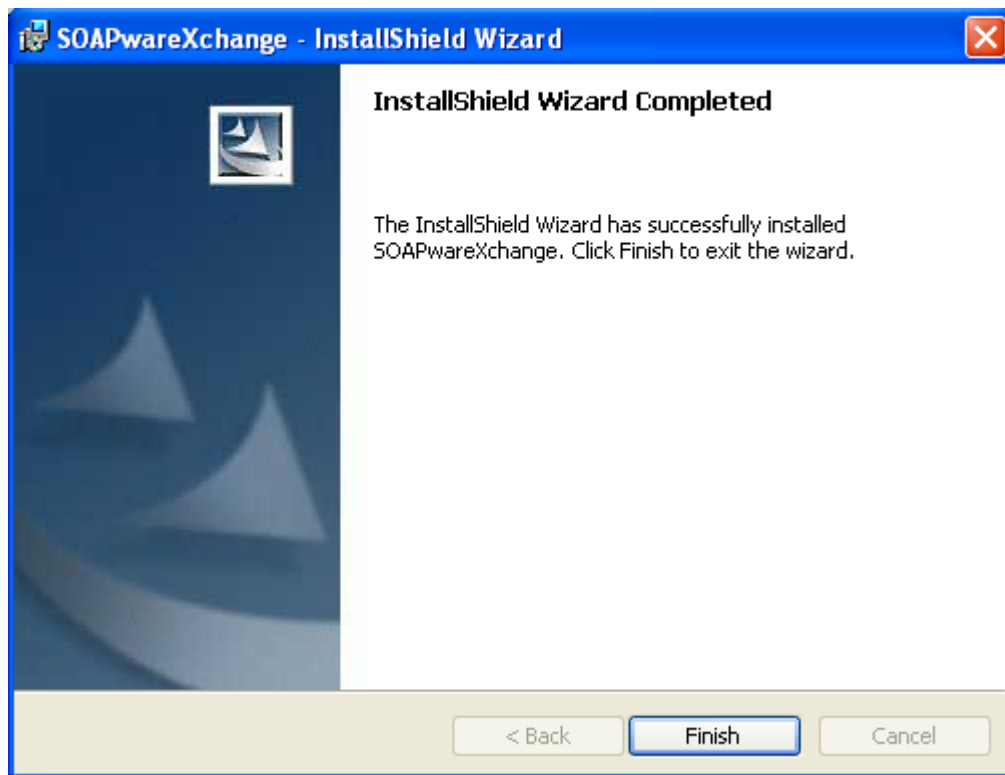
If you want to install the SOAPwareXchange program files to another location, click Change to do so. Click Next to move to the next step.

Ready to Install - Click Next



Click Install to begin the installation.

Finish Installation

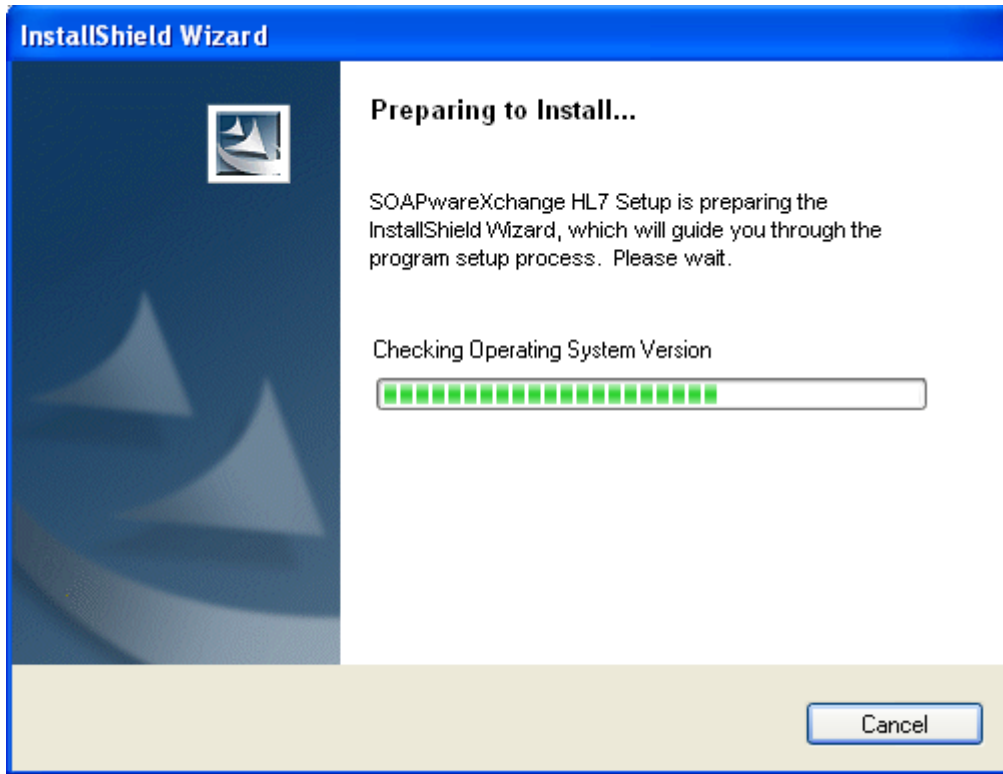


Click Finish. You may now open SOAPwareXchange and run as normally.

Update SOAPwareXchangeHL7

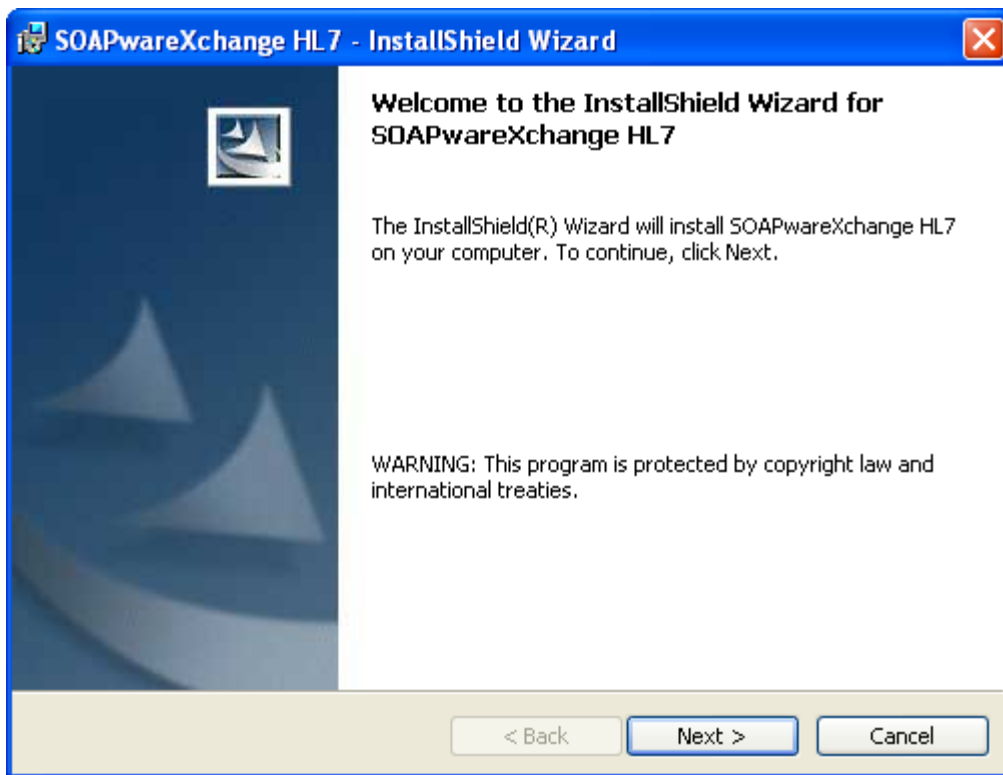
This lesson describes updating your SOAPwareXchangeHL7. This assumes SOAPware has already been updated.

Install SOAPwareXchangeHL7



Run the SOAPwareXchangeHL7 install file from the Intro to Updating lesson. SOAPwareXchangeHL7 should only be installed on one machine, just install it on the computer it currently resides on.

NOTE: Windows Vista, 7 or Server 2008 users may need to right click on the install file and choose "Run as Administrator".



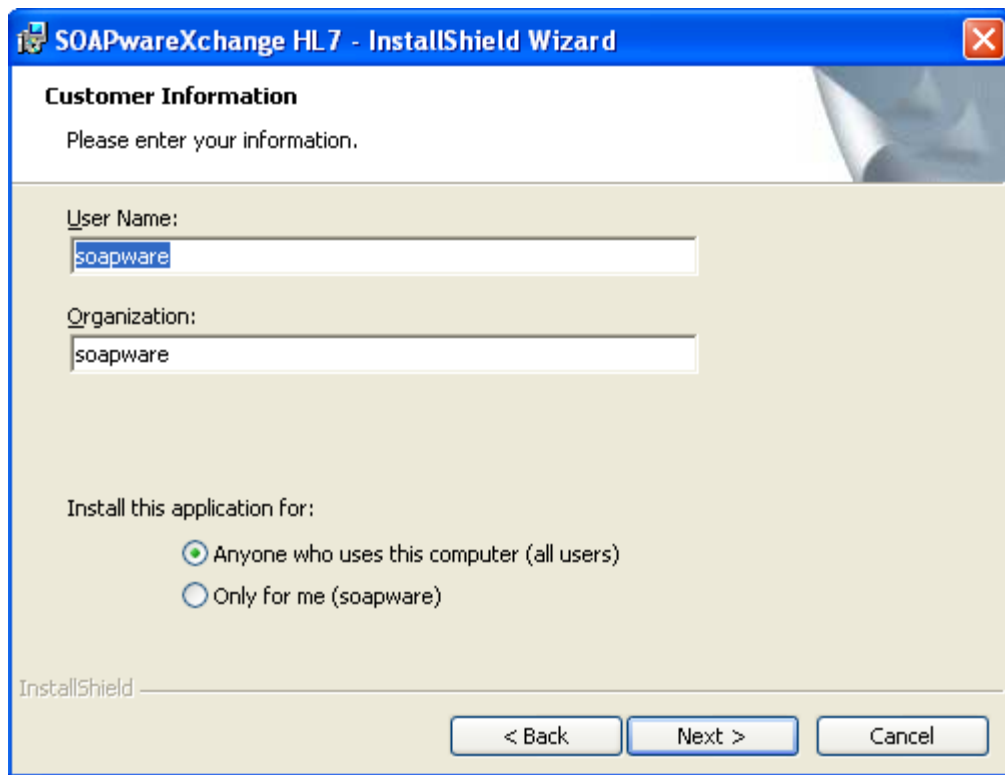
Click Next to proceed.

License Agreement - Click I Accept and Next



If you agree to the license agreement, click I Accept and Next to move on.

Customer Information - Fill out and Click Next



The image shows a Windows-style installation wizard window titled "SOAPwareXchange HL7 - InstallShield Wizard". The window has a blue title bar with a close button in the top right corner. The main content area is titled "Customer Information" and contains the instruction "Please enter your information." Below this, there are two text input fields. The first is labeled "User Name:" and contains the text "soapware". The second is labeled "Organization:" and also contains the text "soapware". Below these fields, there is a section titled "Install this application for:" with two radio button options. The first option, "Anyone who uses this computer (all users)", is selected with a filled radio button. The second option, "Only for me (soapware)", is unselected with an empty radio button. At the bottom of the window, there is a status bar that says "InstallShield" on the left and three buttons on the right: "< Back", "Next >", and "Cancel".

SOAPwareXchange HL7 - InstallShield Wizard

Customer Information

Please enter your information.

User Name:
soapware

Organization:
soapware

Install this application for:

☒ Anyone who uses this computer (all users)

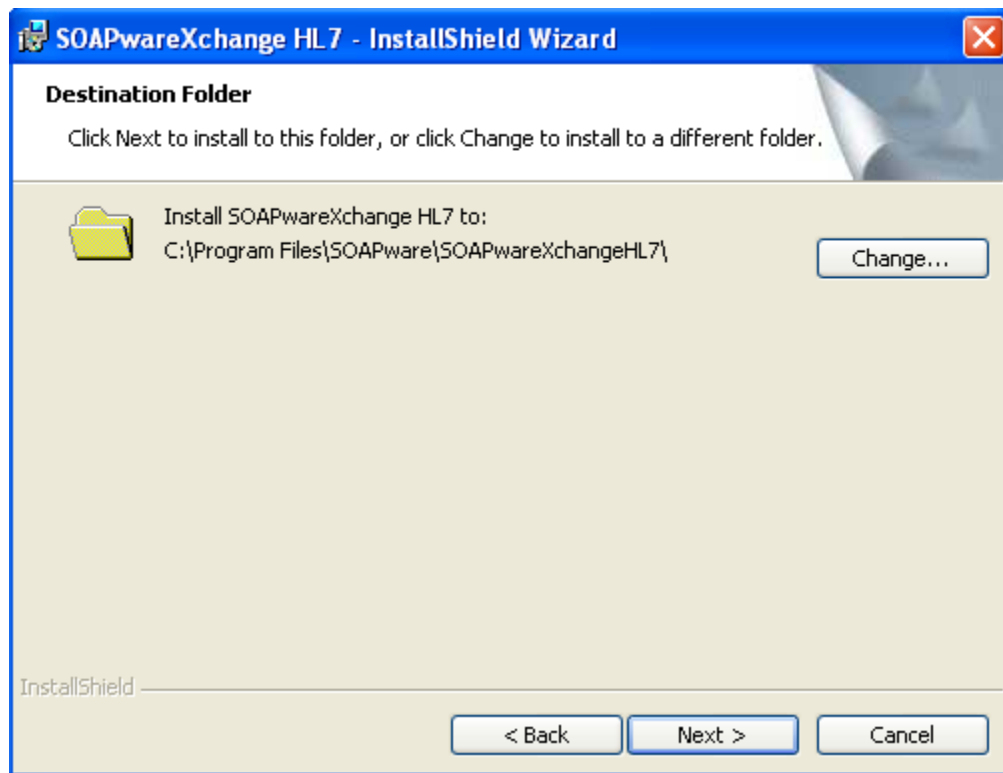
☐ Only for me (soapware)

InstallShield

< Back Next > Cancel

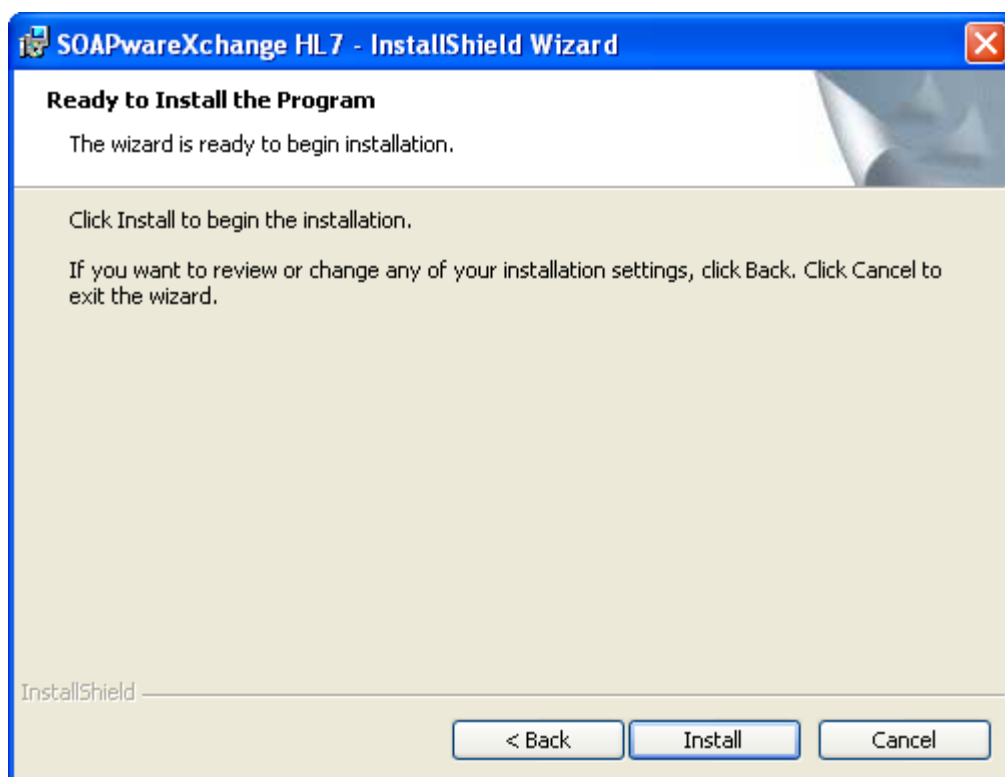
Fill out the user name and organization. If you want all users to be able to use SOAPwareXchangeHL7 on this computer choose Anyone who uses this computer (all users). Then click Next.

Destination Folder - Choose location and Click Next



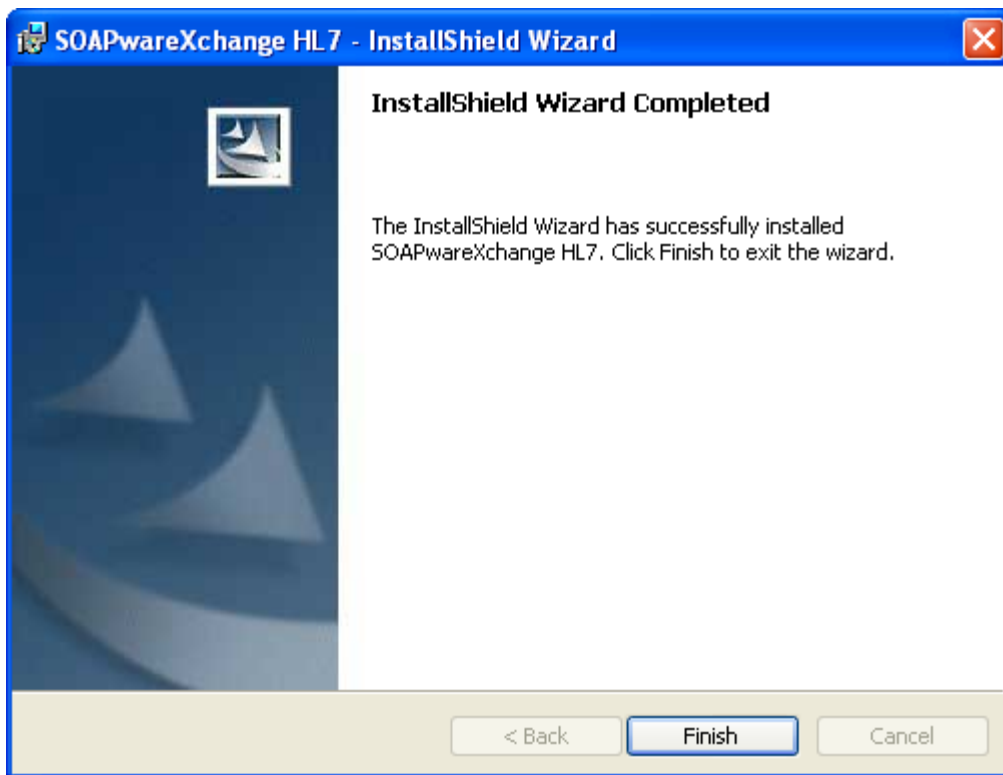
If you want to install the SOAPwareXchangeHL7 program files to another location, click Change to do so. Click Next to move to the next step.

Ready to Install - Click Next



Click Install to begin the installation.

Finish Installation



Click Finish. You may now open SOAPwareXchange and run as normally.

Update Data Manager

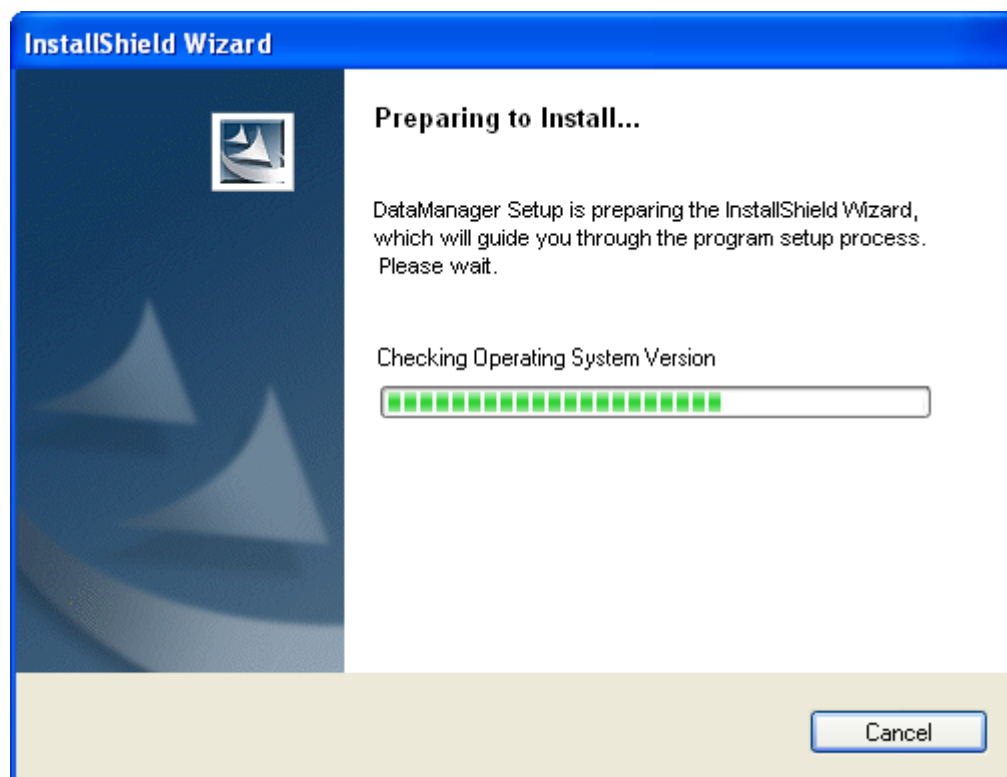
This lesson walks you through updating Data Manager.

Data Manager Prerequisite

NOTE: Data Manager 2011 **REQUIRES** PostgreSQL 8.3. It will not work with PostgreSQL 8.2. To check your PostgreSQL version, check your server computer by going to Start, Programs, and look for PostgreSQL. It will either list PostgreSQL 8.2 or PostgreSQL 8.3. If it shows PostgreSQL 8.3, proceed with updating to the latest Data Manager. If it shows PostgreSQL 8.2, continue to use your current version of Data Manager that will continue working even if SOAPware is updated.

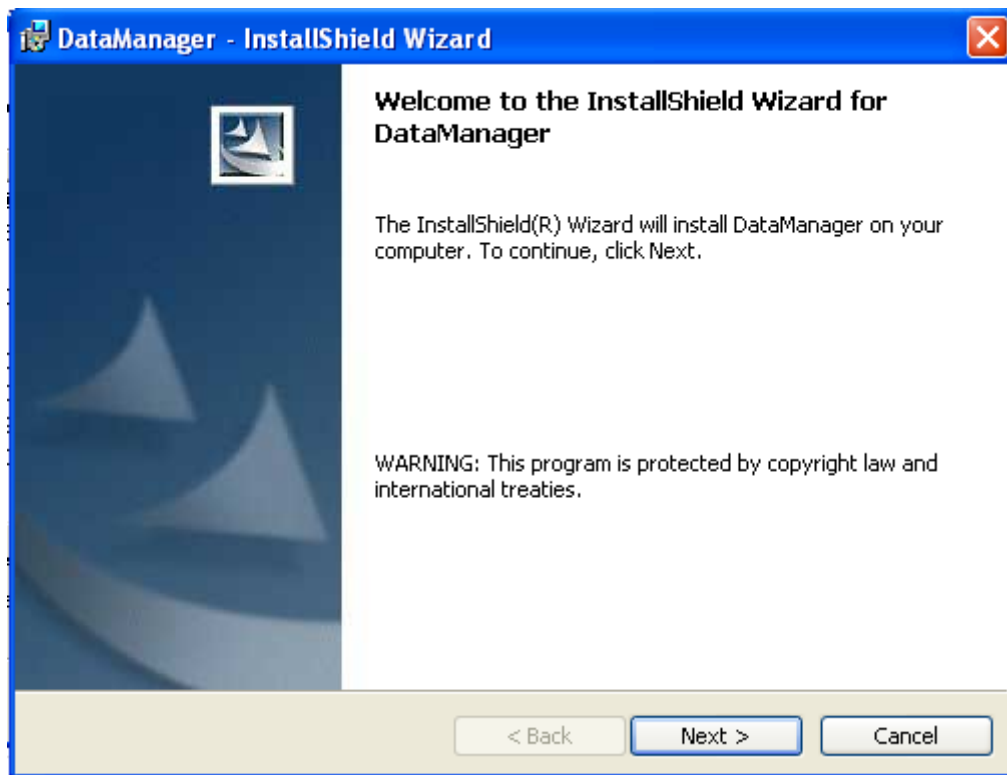
Before proceeding with the installation, ensure that everyone is out of SOAPware when installing DataManager as the installation will restart the database to make necessary changes to the database.

Install Data Manager



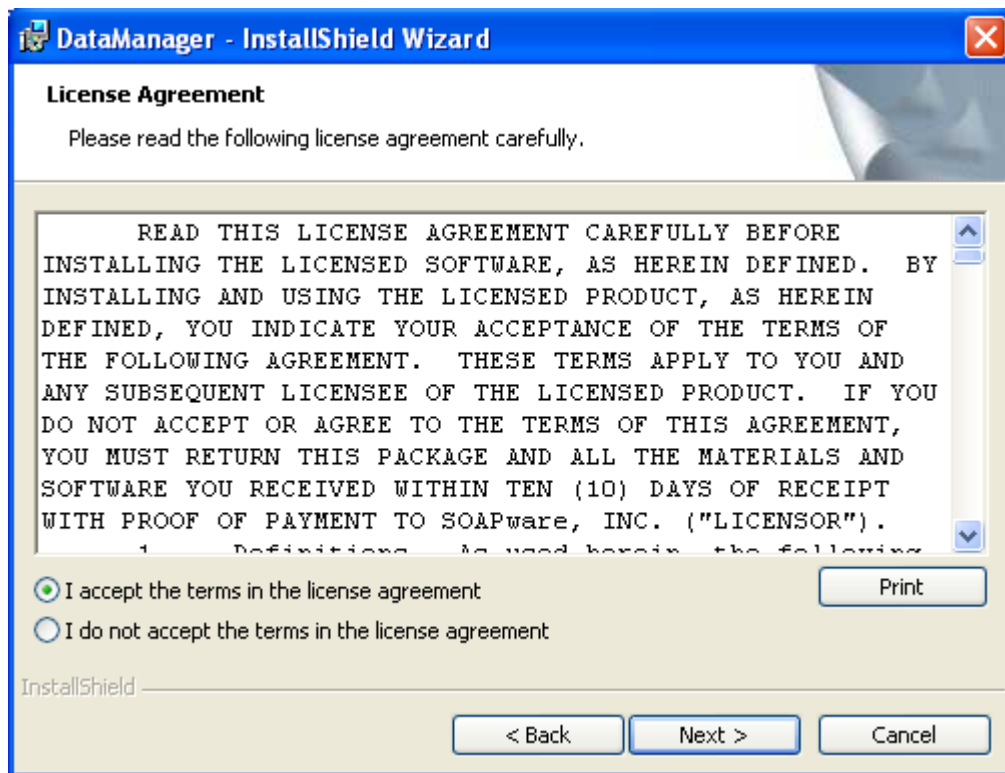
Run the Data Manager install file from the Intro to Updating lesson on your server computer. NOTE: Windows Vista, 7 or Server 2008 users may need to right click on the install file and choose "Run as Administrator".

Welcome Menu - Click Next



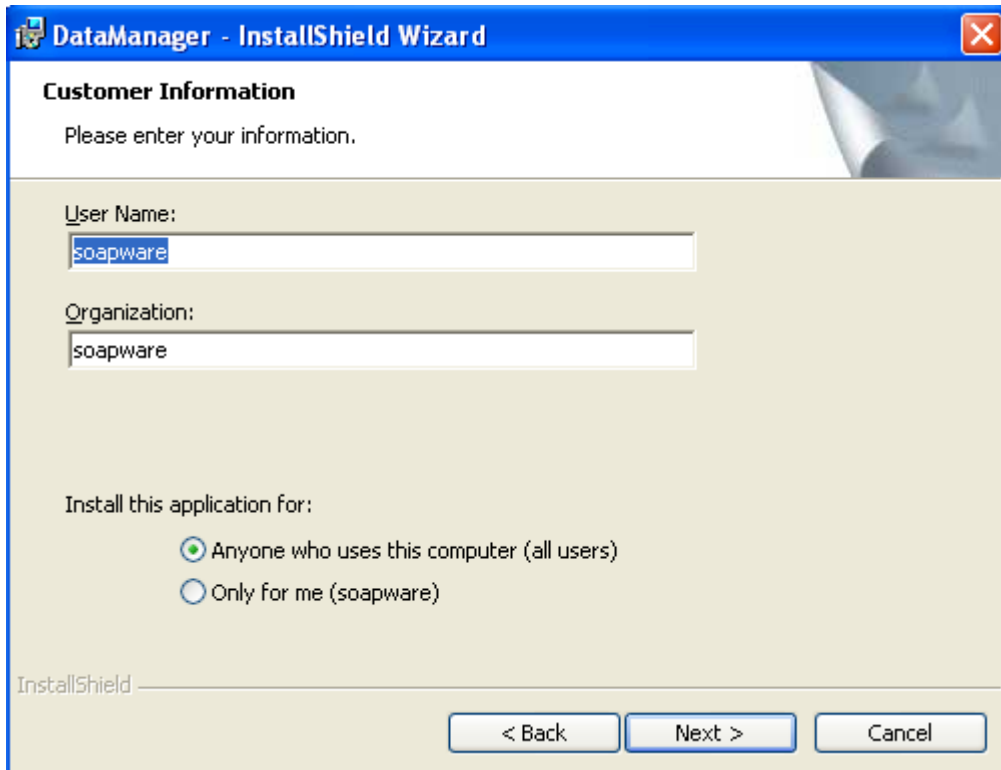
Click Next to proceed.

License Agreement - Click I Accept and Next



If you agree to the license agreement, click I Accept and Next to move on.

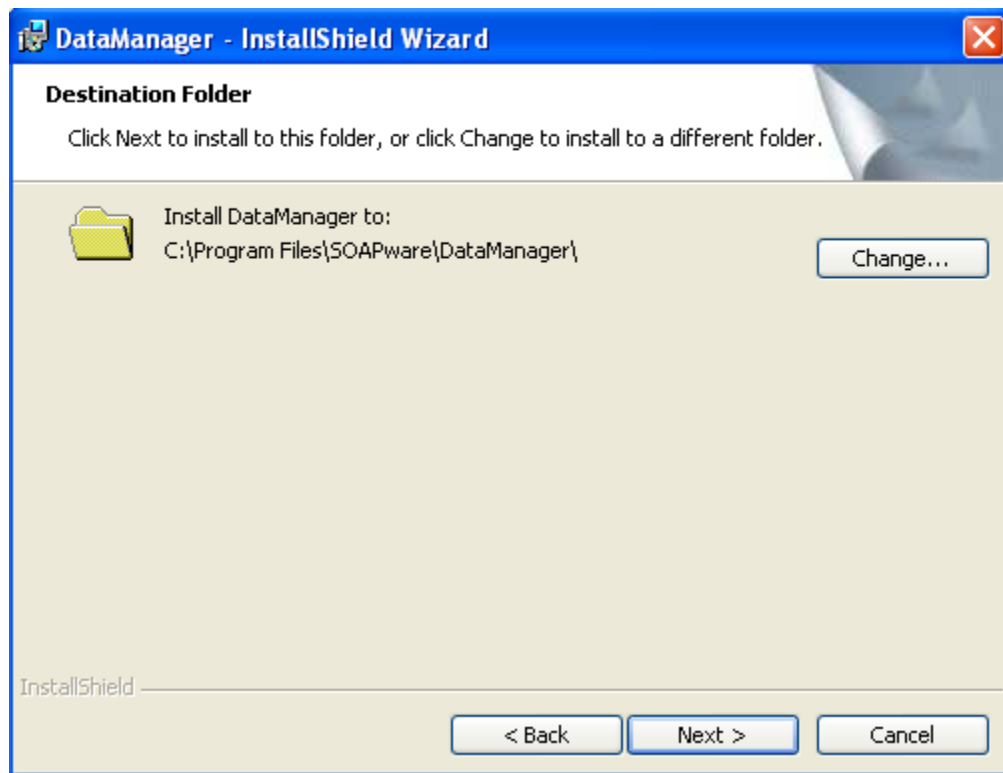
Customer Information - Fill out and Click Next



The screenshot shows a Windows-style dialog box titled "DataManager - InstallShield Wizard". The main heading is "Customer Information" with the instruction "Please enter your information." Below this are two text input fields: "User Name:" containing "soapware" and "Organization:" also containing "soapware". Further down, under the heading "Install this application for:", there are two radio button options: "Anyone who uses this computer (all users)" which is selected, and "Only for me (soapware)". At the bottom left, the text "InstallShield" is visible. At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

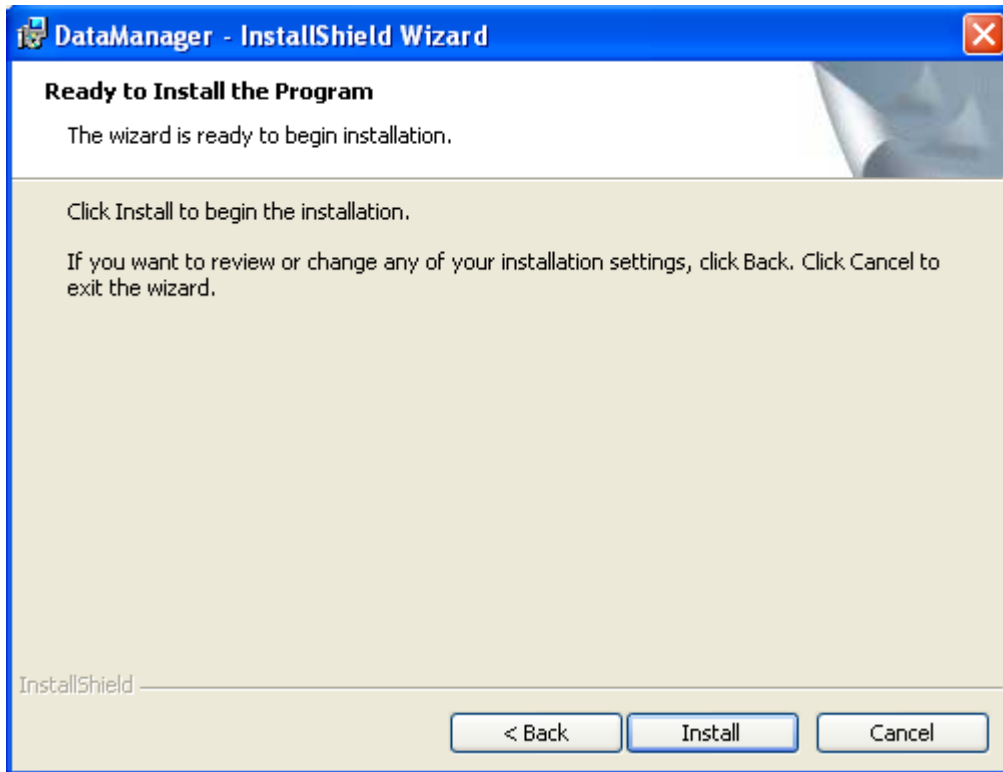
Fill out the user name and organization. If you want all users to be able to use SOAPwareXchange on this computer choose Anyone who uses this computer (all users). Then click Next.

Destination Folder - Choose location and Click Next



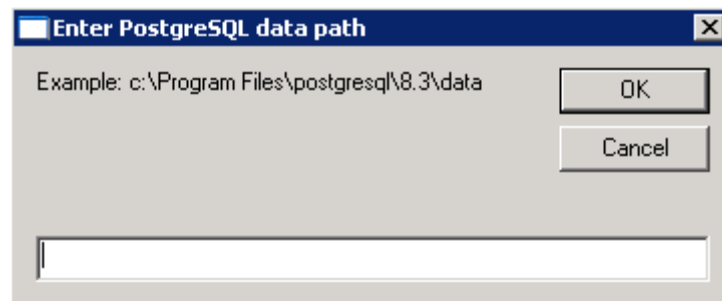
If you want to install the Data Manager program files to another location, click Change to do so. Click Next to move to the next step.

Ready to Install - Click Next



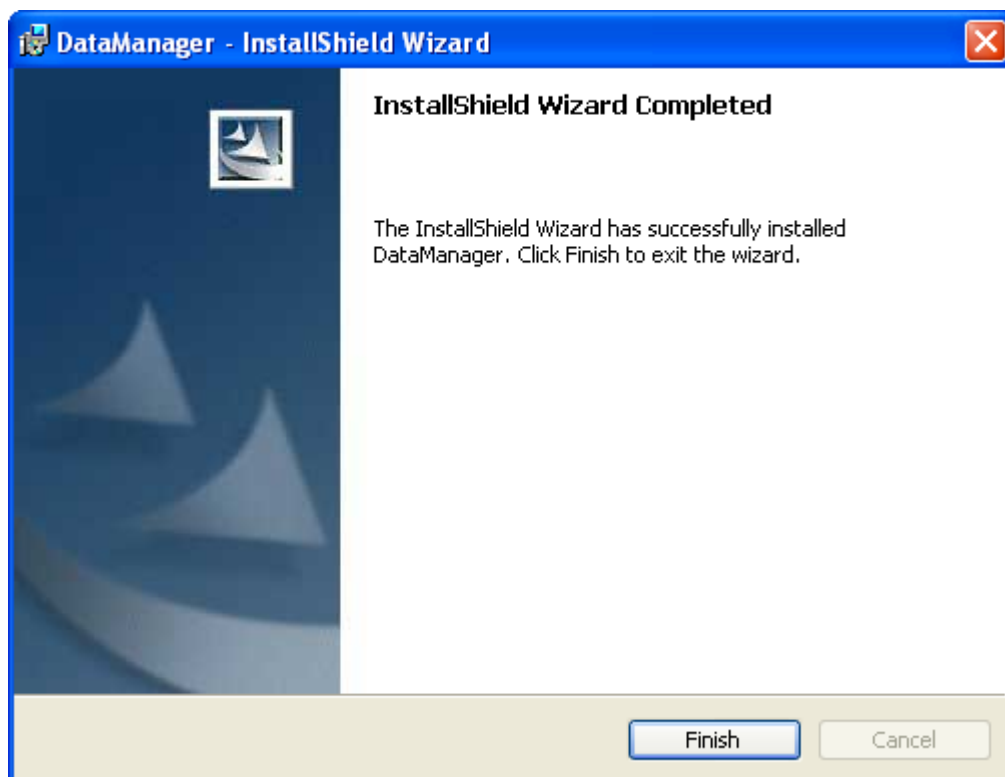
Click Install to begin the installation.

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.

Finish Installation

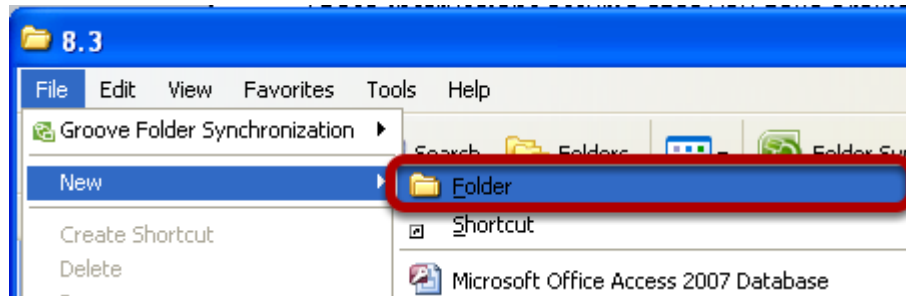


Click Finish. If you were using Data Manager 2010.2 or beyond previously, you are finished. If you were using Data Manager 2010.1 or lower before, make sure [these configuration changes](#) are completed.

Configure Data Manager

This lesson shows how to configure Data Manager 2010.3 or above. This needs to be done the first time after updating to 2010.3 or greater of Data Manager from a 2010.1 or lower version.

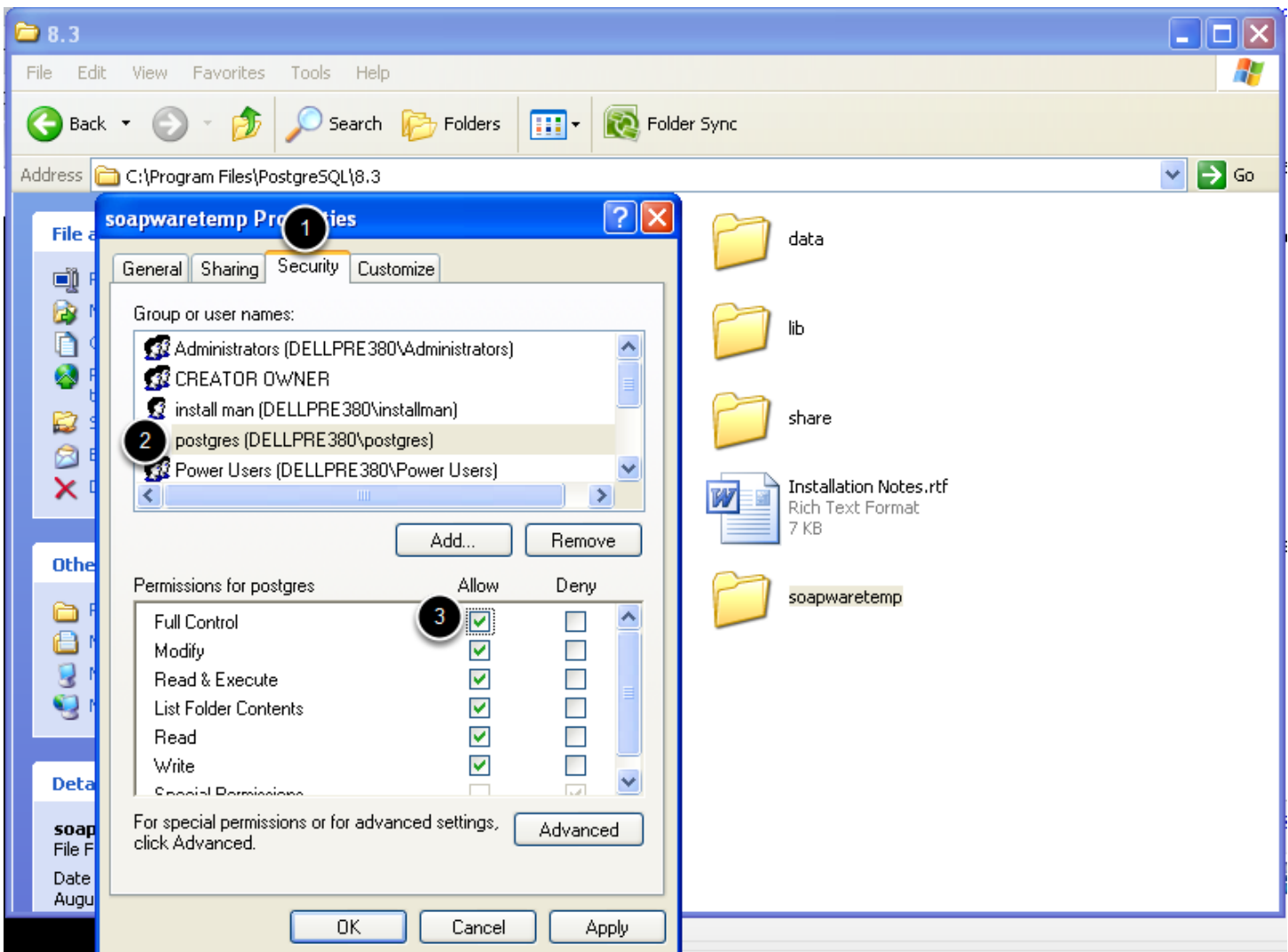
Create the soapwaretemp folder



Open My Computer and browse to your data location. By default, this is C:\Program Files\PostgreSQL\8.3\, if you chose another location in the installer, go to that folder. Then go to File, New Folder. Name this folder soapwaretemp. So the folder path for soapwaretemp on a default data location would be C:\Program Files\PostgreSQL\8.3\soapwaretemp.

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

Set Permissions on soapwaretemp

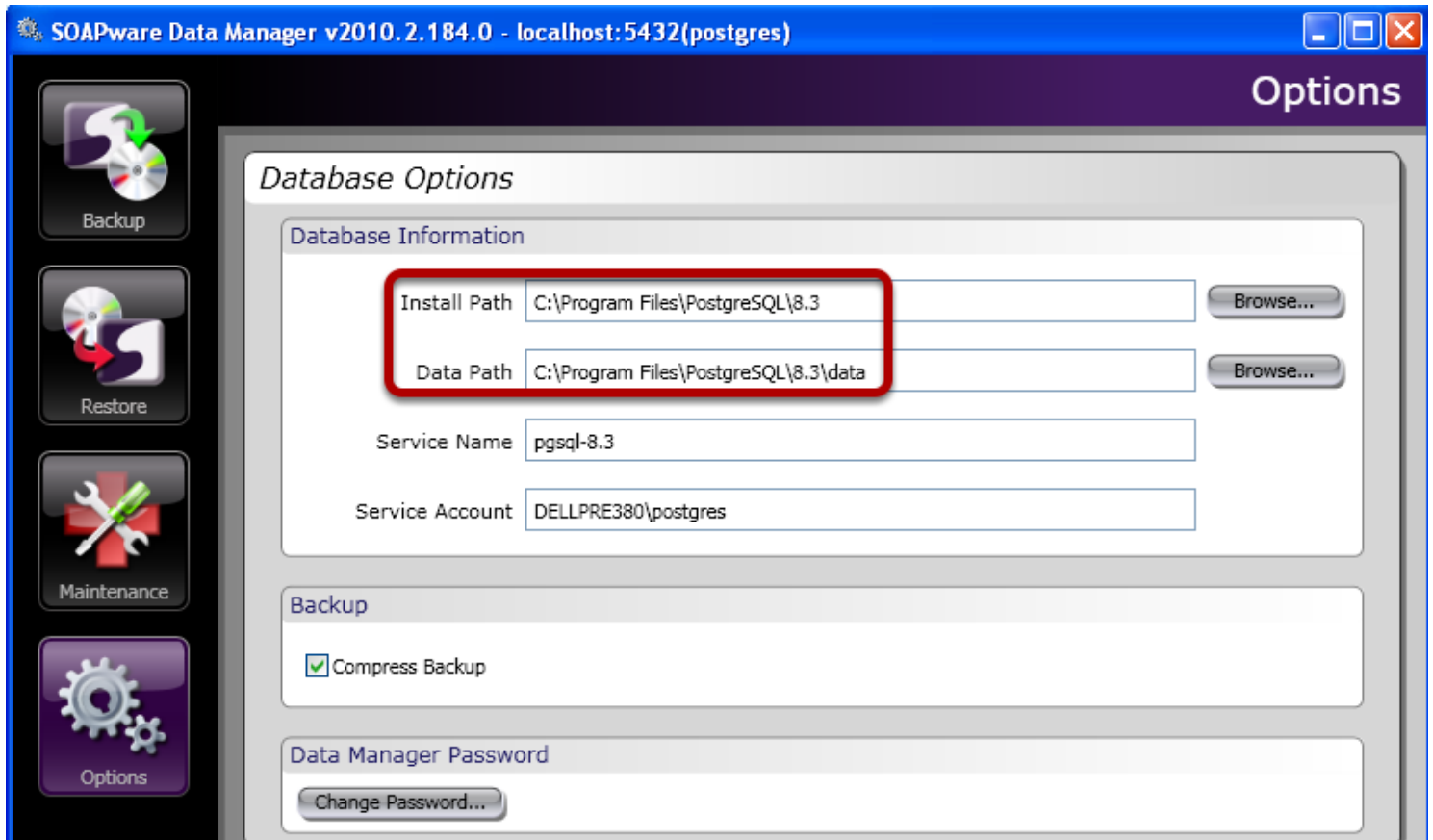


Now that the folder is created, right click on soapwaretemp and go to Properties.

1. Click the Security tab.
2. Select the postgres user.
3. Check Full Control and then click Apply and OK.

NOTE: Windows Vista, 7 or Server 2008 users may need to click Edit Permissions on the Security tab before performing Step 2.

Ensure Data locations are set correctly in Data Manager



Go to Start, Programs, SOAPware, SOAPware DataManager. Type in the database password and click Login. Click on Options. Verify that both the Install and Data path are correct. If you installed the database to another location, click Browse beside each necessary to change the path. Your Data Manager configuration is complete!