

How to Install the Recall Manager on a Client's Computer

Installing the Recall Manager program:

Part 1. Downloading the Files

1. Download Filezilla (Note: if you are working on a client's server, you should NOT install Filezilla, you should use Internet Explorer to ftp the files.)
2. To use Internet Explorer instead of Filezilla:
 - Go to Start >> Run >> enter in <ftp://development.odprofessional.com>
 - If that does not work, try <ftp://204.209.45.220>
 - log into the Reports folder:
 - user name: (ask us for the user name)
 - password: (ask us for the password)
 - The Reports folder is located here (on the development server):
D:\FTPRoot\Reports\Recall Manager\Recall Manager 2_1.zip
 - ***There are two zip files located there. Be sure to choose Recall Manager 2_1.zip***
3. Go to Reports folder and locate the zip file, as outlined above.
4. ***Also ensure that you copy the three Recall Reports files into the client's Reports\Recalls folder***
5. You will find the three Reports files in the Reports folder on the development folder in "Recalls" – D:\FTPRoot\Reports\Recall Manager\Recalls
6. You will then copy the three Recall Reports into the client's Recalls folder. For example, it could be located here: H:\Optodata\Reports\Recalls
7. ***If the client has a copy of Filezilla installed on their system, then follow these procedures:***
 - Run FileZilla
 - Go to the Site Manager under File Menu
 - Select "Reports" connection under My Sites List on the left hand side.
 - If "Reports" connection is not in the list, create a new site called "Reports" by clicking on the New Site button and with the following information below:
 - Host: development.odprofessional.com
 - ServerType: FTP – File transfer Protocol

- LogonType: Normal
- user name: (ask us for the user name)
- password: (ask us for the password)
- Click the Connect button to connect.
- Once connected, click on the “+” sign beside the “/” on the Remote Site to show the subfolders available.
- Look for the Recall Manager folder and double click on the folder icon. This should show the files that need to be downloaded.
- Under the Remote Site file listing, download the file Recall Manager 2_1.zip and Recalls folder to the Local site Desktop.
- Close FileZilla once download is completed.

Part 2. Copying the Zip file to the client's system

1. Copy the Recall Manger 2_1.zip file onto the client's desk top
2. Create a folder called Recall Manager on the same drive that their copy of ODPro is located. The drive will usually show as “ODPro on.....” For example: H:\ODProfessional\Recall Manager
3. Cut the zip file from the desk top and paste into the new Recall Manager folder
4. Unzip the file

Part 3. Adding a new table to the database

1. Right click on the client's Caché cube
2. Select “Studio” from the list
3. Ensure that you are in the correct namespace, by checking the title bar at top of Studio. Usually this should say ODPro.
4. Go to Tools >> Import Local >> and change folders
5. Change the folder to where you have put the new Recall Manager folder
6. You will see a file named User.recallMgr.xml
7. Open this file, and click OK
8. The program starts compiling
9. close Caché Studio once completed compiling

Part 4. Opening and Running the Recall Manager

Before running through the following steps, ensure that:

- a. The program is installed on the workstation of the person who will be using it (in this case, go to Part 2, Step 3 and copy / paste the setup.exe file to the individual workstation).
 - b. That the owner of the workstation has admin rights to install software on their machine.
2. Click on the setup.exe file created in Part 2, Step 3.
 3. As you follow the setup wizard, make sure that the Recall Manager program is placed in the correct folder.
 4. Look for where ODPro is installed on the client's computer:
 - a. to do this, right click on the ODPro shortcut icon on the desktop
 - b. select properties
 - c. the Target box shows the complete path of where ODPro is installed
 - d. the correct path is what shows before the .exe file name
 - e. for example: C:\Program Files\EMRlogic
 5. To open the Recall Manager program, go to Start >> All Programs >> EMRlogic Applications >> EMRlogic Recall Manager
 6. The Recall Manager program will need the three Reports files (downloaded in Part 1 - Steps 4, 5 and 6) when you try to Print Reports from the program.