

SOFTWARE IMPLEMENTATION TECHNICAL GUIDE



OD PROFESSIONAL

ENTERPRISE 2009

Building a better practice

First Response Support 866.623.5644

 *Driving Flawless Consistency*

powered by 



InterSystems Caché

OD Professional™ uses Caché technology. InterSystems Caché® is the high-performance object database that runs SQL five times faster than relational databases. Caché enables rapid web application development, extraordinary transaction processing speed, massive scalability, and real-time queries against transactional data – with minimal maintenance and hardware requirements.

Caché technology underlies much of the high end healthcare solutions around the world, and includes such customers as: BT (British Telecom), Epic Systems, John Hopkins Health System, the US Department of Defense, and the US Department of Veterans Affairs.

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Tips for Getting Ready to Install OD Professional™

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This section provides helpful tips to ensure both a smooth infrastructure and OD Professional™ implementation before we install OD Professional™ on the server and workstations in your office.

- ✓ **Internet Explorer:** Internet Explorer versions 7 and 8 are supported at this time, and we also require the Java plug-in and latest Adobe Reader to be installed.
- ✓ **Remote Access Account:** to log on to your server remotely allowing us to do regular updates and maintenance on your database server. This account can be audited and disabled by your staff or IT technician. This is an optional issue and we normally only utilize such accounts to respond to a support call.
- ✓ **IP Address Setup for the Server:** Set up a static IP address for the computer that will be used for the OD Professional™/Caché Server installation. We also recommended that the server has its own monitor connected to it.
- ✓ Please use a **naming convention** for all machines that uses 11 or less letters/characters
- ✓ **Shared Folder Access:** To use the OD Professional™ application, all network users must be able to browse and map to a shared folder called "ODProfessional." The installation process automatically creates this folder on the server. (Before we install OD Professional™, we recommend that you test the share functionality by setting up a temporary shared folder on the server and ensuring that each workstation/user can map to the shared folder and can create, edit, rename or delete a file and/or folder in the same folder.)
- ✓ **User Access:** It is recommended that all users have administrative rights on their respective workstations. It's a good idea to explain to each user how desktop and other settings can look different when separate user accounts are used to log into a commonly used workstation.
- ✓ **Screensavers & Power Management Settings:** Screen resolution settings must be set at a minimum of 1024 by 768. Power management settings should be disabled or turned off for the day of the OD Professional™ installation in order to prevent hibernation and the network card from shutting off.

If you have any questions about the installation, please call 1-866-623-5644 and ask to speak with one of our deployment specialists.

System Recommendations - Enterprise Versions 5.0, 2008 and 2009

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Server Guidelines

REQUIREMENTS	DEDICATED SERVER CONFIGURATION I	DEDICATED SERVER CONFIGURATION II
Operating System	<p>Windows XP Professional SP2</p> <p>*Even though XP Pro will be an acceptable solution for a server, we highly recommend installing Windows Server 2003 or 2008</p>	<p>Windows Server 2003 or 2008 with appropriate number of user licenses. (Both 32 bit and 64 bit versions are supported).</p> <p>Windows 2003 Small Business Server is not supported by InterSystems for the Cache database engine.</p> <p>We would discourage using an Exchange or SQL Server on the same machine</p>
Processor	Intel Dual Core (equivalent or better)	Intel Core 2 Duo (equivalent or better)
Memory (RAM)	2 GB or higher	4 GB or higher
Hard Drives	120 GB Ultra ATA/133 7200 RPM (or better) (completely dependent on usage – see notes)	200 GB Storage Ultra ATA/133 7200 RPM or SATA (or better) (completely dependent on usage – see notes)
Drives	CD / DVD-ROM	CD / DVD-ROM
Back-up Device	DVD-RW or data tape (DAT). An automated backup-system is strongly recommended	DVD-RW or data tape (DAT). An automated backup-system is strongly recommended
Video Card	128 MB unshared	128 MB unshared
Monitor	17" VGA capable of 1024x768 resolution @16-bit color	17" VGA capable of 1024x768 resolution @16-bit color
Network Card	100 Mb Adapter on CAT5e or better.	Gigabit Adapter on CAT5e or better. Multiport Gigabit Adapters (recommended for clients with multiple offices)
UPS	Uninterruptible Power Supply	Uninterruptible Power Supply
Remote Support	Enexity SecureLink Gatekeeper.	Enexity SecureLink Gatekeeper.

Workstation Guidelines

Operating System	Windows XP Professional SP2 Windows Vista Business or Ultimate Windows 7 Pro or Ultimate Not a factor if using Terminal services
Processor	Intel Dual Core or Core 2 Duo (equivalent or better)
Memory (RAM)	1 GB or higher
Hard Drive	80 GB Ultra ATA/133 7200 RPM (or better)
Video Card	128 MB unshared
Monitor	17" SVGA capable of 1024x768 resolution @ True Color
Network Card	Fast Ethernet on CAT5e or better
Remote Support	Enexity SecureLink Gatekeeper provided by EMRlogic Systems.

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Remote Access Tool:

Due to the nature of the application solution being provided we need to have remote access to the database server as well as the ability to do remote screen sharing to provide end-user support. We use SecureLink for our remote support, desktop sharing, and database maintenance tool.

We find it to be the most secure remote access solution currently available that will provide our clients with next-generation encryption, reporting, and security. Please visit <http://securelink.emrlogic.com> and <http://www.enexity.com/forenterprises/c2/fag/> to view a full demonstration of the technology and several white papers outlining SecureLink's features and benefits.

SecureLink features some of the following benefits:

- Email notification of whenever EMRlogic disconnects after a session and summary email with details of all activity
- Quicker problem resolution times due to secure and easy connect features
- A detailed, real-time audit of all activity, down to an individual user
- Replaces Netmeeting, Log Me In, open RDP accounts, and other freeware
- No need to modify the firewall or change other security applications
- Total control over all EMRlogic access (when and to what resources) – clients control the remote access and can turn it off as needed
- Completely free for all EMRlogic clients
- Currently in use at healthcare facilities and by IT Healthcare service providers that are sensitive to HIPPA compliance, including our partner InterSystems.

Please note that if you already have a standard Remote Access IT process/tool being managed by your local IT Professional, that you are happy with, it will not be necessary to stop using it or replace it with this new tool. You simply need to add an account for EMRlogic and provide us the required credentials and user instructions for both Server and desktop support.

If you have any questions or concerns, please contact our Support Team directly at support@emrlogic.com



Tablets PC

All new Exam Forms testing has been carried out on a Motion Computing Tablet (LE-1700). However, all Tablet PCs available through Motion Computing will be compatible.

Please visit the following website for more information: <http://www.motioncomputing.com>

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Peripherals & Protection Applications

Barcode Scanner	Windows XP compatible
Card Scanner	Must be TWAIN compliant and have a TWAIN driver available (i.e. ScanShell 800N)
Printers	Newer Laser or Inkjet
Label Printer	Dymo
Firewall Solution	Consult your certified network technician
Protection Software	Panda is not compatible Consult your IT technician

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Barcode Scanner, Label Printer Package

Required For Frames Inventory Management only

We recommend the following hardware, which has been found to be compatible with the OD Professional™ software.

Option A: For Offices not using Butterfly Labels:

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Note: please purchase Dymo printers that are compatible with Dymo software version 7.8 but not higher.

Dymo Printers:

- Labelwriter 400
- Labelwriter Turbo 400

Dymo Labels:

- Multipurpose Labels ½" x 1" – Product # 30333 with Plastic Tags: OP-Tags – style No. 830 (suggestion – color ‘frosted’ available from Arch Crown)
- *Dymo products are generally available at local office supply stores.*

Note: Your scanner must be able to set a prefix and suffix of a bar code. We recommend the following:

Symbol Tech Barcode Scanner:

- LS 2208 – Barcode Scanner with USB interface. Part Number: LS2208-SR20001R-UR

Metrologic Bluetooth Wireless Scanner:

- Metrologic Bluetooth MS9535 VoyagerBT

Note: All scanners are available from POS World (recommended supplier): (888) 801-7282; www.posworld.com.

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Option B: For Offices with a Butterfly Label requirement:

Cognitive Printer:

- LBT24-2043-012 Cognitive Advantage 2.4" Label Printer LX, Thermal Transfer, Parallel Interface.
- Thermal Transfer Ribbon
- 2.0" x 0.56" with 2665 labels per roll
Item number: 03-02-1732

Note: Your scanner must be able to set a prefix and suffix of a bar code. We recommend the following:

Symbol Tech Barcode Scanner:

- LS 2208 – Barcode Scanner with USB interface. Part Number: LS2208-SR20001R – UR

Metrologic Bluetooth Wireless Scanner:

- Metrologic Bluetooth MS9535 VoyagerBT

Note: All scanners are available from POS World (recommended supplier): (888) 801-7282; www.posworld.com.

Scanner Wand

HHP ImageTeam Wand:

- 3800g – HHP IMAGETEAM 3800g General Purpose Linear Image Scanner (USB interface requires an optional USB interface cable mfg part #44206161-01E)

Installation and Use Instructions: ScanShell 800N Insurance Card Scanner

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1. Attach Scanner to the computer's USB connection port.
2. The Windows operating system will automatically detect new hardware and inform that it has found a new USB device.
3. Insert ScanShell 800 Driver CD into computer. When prompted to select a specific driver, select CD-ROM device and click on Next to finish driver installation.

If using Windows 2000 & XP, you may receive a warning during installation that "This hardware has not passed Windows logo testing" or "The software does not contain a Microsoft digital signature." Please select "Continue the installation."

4. After installation, you will need to restart your computer.
5. Next you must calibrate the scanner. Open OD Pro and click on "Normal Capture" in the tool bar. A pop-up box called "Select Image Capture Source" will appear.
6. Select CSSN-ScanShell 800N along with TWAIN Device and Scanning. Then click OK.
7. The "Predefined Setting" window will appear. Find the "Calibrate" button and click on it. The Calibration Page will appear.
8. Take the Calibration Paper that was provided with the scanner and insert it with black lines down and the arrows pointing toward the scanner.
9. Click on the "Calibrate" button and the paper will run through the scanner. When done, you are ready to use the scanner.

Note: MedicScan and ScanShell are two separate objects. MedicScan is the software that works with the ScanShell 800N hardware. Please visit the following web page for more information:

http://www.scanshell-store.com/medical_card_scanner.htm

Remote desktop / terminal services machines:

For our clients using remote desktop / terminal services machines (satellite offices), please note that the Scanshell 800N A6 Simplex Scanner is produced by Ambir Technology Inc. (630-530-5400), and cannot be shared on a RCD with Windows 2003 server.

Ambir Technology is currently working on a solution, and for now, they recommend purchasing a software solution from Remote Scan, www.remote-scan.com. The license cost is per workstation, with a single user license costing approximately \$290.00.

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To use the scanner with OD Pro:

1. In the "Patient View" screen, bring up the patient file to which you want to attach the insurance card.
2. Click on the "Normal Capture" button located in your tool bar.
3. A box titled "Pick Image Capture Source" will appear. Highlight CSSN-ScanShell 800N and click the buttons Twain Device and Scanning. Then click OK.
4. This will bring up the "Predefined Setting" window.

5. Select Gray/Black and 150dpi.
6. Insert the card in the scanner and hit the Scan button.
This will start the process of scanning the card.
7. Once the card has been scanned you may save that to the patient's record.
8. You do this by clicking File and then Save As. A window labeled "Imaged Classification" pops up. At this point you may label your insurance card by clicking in the box labeled "Description" and typing in the information.
9. To view the saved insurance card, open up the patient file in the Browse Tree and click on the folder icon labeled "Video Image". This will show all cards that have been saved to that patient's file.

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To View Image with Microsoft Viewer:

1. To view a saved image in OD Pro with the Microsoft viewer instead of the OD Pro viewer, you must first pull up the image in OD Pro.
2. Next, left-click on Tools then select Export to file.
3. At this point a Save As box will pop up. Select the file to which you would like it saved and enter a file name for the image.
4. You must then go to the file in which the image was saved and open it. This will allow you to view the image using the Windows image viewer.

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Linking of Ophthalmic Instruments, Slit-Lamp & Retinal Cameras (CCD)

ENTERPRISE EHRs by OD Professional™ have been linked to most well-known brands of instruments and cameras including Nidek, Marco, Humphrey, Reikert, Topcon, Canon, and Nikon & Hitachi. When considering the linking of a particular instrument, please note the following:

- Manufacturer's cables to interface to the instrument are a mandatory requirement.
- Many instruments now take advantage of a USB port.
- Any CCD camera (whether retinal or slit-lamp) can capture live video using the Flashpoint 3DX Pro card. This requires cabling from the camera to the computer workstation to the Flashpoint card. We use no other video card.
- Most cameras are now **digital**.

OD Professional™ Backup Procedure

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The following steps detail what you need to do to successfully back up your OD Professional™ database. (This database contains all your patient information, invoices, reports, and so on.) Backing up your OD Professional™ database is relatively simple since all of the information is located in one main folder.

- **Step 1: Stop the Database Engine on the Server:**

1. On the system tray to the left of the Windows clock is a blue cube. Right-click on the cube, and then select the option “Stop Caché”.



The following prompt appears:



2. Select Shut down, and then click OK. Notice that the cube turns from blue to gray to indicate the database is no longer running.

- **Step 2: Back up 2 Folders:**

1. Optodata folder located in the shared ODProfessional Directory
2. Journal folder located in the InterSystems\Cache\Mgr Directory or in the Cachesys Directory.

You can now back up the above-mentioned folders following the steps required by your specific backup system. (If you have any questions about this process, please contact your hardware technician.)

- **Step 3: Restart the Database Engine on the Server:**

1. Right-click on the Caché cube, and then select “Start Caché”. The cube turns from gray to blue to indicate that the database is running.

Automating the Starting & Stopping of the Database:

You can use the following commands to start & stop the database:

These commands can be placed in two separate batch files and run from the Windows Task Scheduler at the appropriate times before and after your backup software runs, or they can be run directly through your backup software as pre and post backup commands if your software has that capability.

```
c:\cachesys\bin\css.exe STOP cache
```

```
c:\cachesys\bin\css.exe START cache
```

NOTE: “c:\cachesys\bin\” represents the path to the css.exe file. It could also be located at “c:\Intersystems\Cache\bin\” or on a different drive, depending on your installation.

Setting up the Backup Frequency

We recommend you do a backup nightly. We also recommend you set up a separate backup medium for each day of the week. For example, if the backup is being done on a DVD, have one DVD-RW for each day of the week and rotate them.

If you have any questions about the backup recommendations in this document, please contact one of our technicians using any of the following contact information:

Telephone: 1-866-623-5644; Website: www.odprofessional.com

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Important Notes

- We strongly recommend that every client work with their local IT professionals who will assume responsibility for the optimal infrastructure, configuration, support, data redundancy & recovery planning. OD Professional™ will provide a Service-Level Agreement (SLA) to all clients to clearly identify the issues that we support.
- Windows XP or Vista Home Editions are not adequate operating platforms for OD Professional™. This is not a concern if using Terminal Services.
- Windows XP Service Pack 2. Please advise our technicians if you have been unsuccessful in loading XP Service Pack 2 on any one of your computers as it may affect the proper loading of the Caché 5 database.
- Appropriate networking equipment such as a high-speed Ethernet switch is required to connect the workstations to the server.
- For data transfer and remote support purposes, we require permission to install Enexity Securelink Gatekeeper remote access software on the server.
- Server requires a static internal IP address.

- Anti-Virus software is mandatory for all systems, including each workstation. We recommend Norton or AVG. There may be compatibility issues between Caché and some anti-virus programs.
- A hardware firewall may be required. Often this can be incorporated directly into the router. Software firewalls are discouraged on workstations as they can prevent communication between the server and workstations and external third parties unless configured properly.
- High-speed Internet access is required for training and support. The following website may be used to test Internet bandwidth (speed): www.dslreports.com.
- Installation of resource intensive third-party download products for music/videos is not recommended on any server or workstation. Internet downloading is a primary source of system corruption.
- Spyware products have known compatibility issues and should not reside on any workstation.
- Hard drive size is dependant on usage – image files, videos, sound and PDF files require significant amounts of hard drive space.
- Third-party products that utilize Crystal Reports or SQL-based applications are known to have compatibility issues with OD Professional™.
- All printers must be Windows XP Professional compatible.
- For smaller systems without a dedicated server, a reliable data back-up device must be available on the workstation acting as the server, i.e. the computer housing the database.
- For clients using our Business Intelligence tutorial and Recall Letters, MS Excel & Word is required. We recommend Excel 2002 or 2003.
- We highly recommend that your IT technician contact us to discuss this document in order to ensure a seamless implementation. Our Deployment Specialists can be reached at 866-623-5644