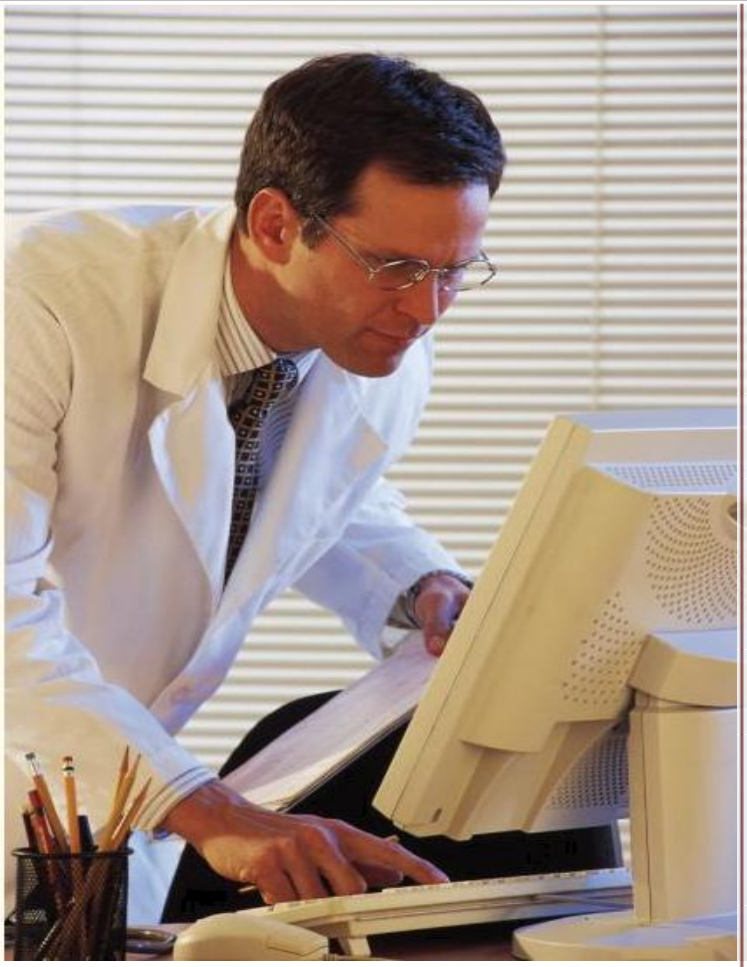
MED2020
Health Care Software Inc.

2011

WinRecs Technical Guide
Full Installation Suite



User Guide

Version 2

MED2020 Health Care Software Inc.

MED2020 Health Software Inc. (MED2020) is a leading provider of modular health information management solutions for the health care industry and is headquartered in Ottawa, Ontario. Solutions are offered to assist in capturing, reporting and analyzing health data to support enhanced information sharing, encourage informed decision making and streamline facility operations. MED2020's flagship product, WinRecs™, is the foundation for a complementary suite of modules that have also been designed to assist health information management departments with their operational needs.

Contact Details

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Email: support@med2020.ca Web: **http://www.med2020.ca**

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End-User License Agreement

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About This Document

The information contained in this document focuses on the installation and maintenance of the MED2020 WinRecs 2.8.8.002 applications.

To learn more about using WinRecs please refer to the WinRecs User Guide, also available as a download from the MED2020 Client site, located at **ftp://web.med2020.ca.**

Document Conventions

Throughout this Technical Guide, text formatting is used to complement the information provided.

Function keys and key sequences are distinguished by large bold text.

Example: **CTRL+M**

References to modules, functions and other values as displayed on the screen are distinguished by italic text.

Example: *WinRecs Application Menu*

File names, paths and cross-references to other sections of the User Guide are distinguished by bold text.

Example: **Command line used for installing SQL Server**
Example: **D:\setup.exe /template.ini**

`Values to be typed are distinguished by the courier font.`

Example: Type `01011920` in the field.

Note: Important notes and hints are distinguished by dark red text with light gray background.

Example:

Note:	This is an important note.

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1. Introduction

READ THIS SECTION BEFORE INSTALLING ANY SOFTWARE

This document was written for a moderately technical audience. This document assumes that the user is familiar with the fundamental concepts with respect to file, computer, server and network administration. This document will detail the proper procedures for installing a database server specific to a WinRecs installation. Administering computers, servers or networks other than instructions contained in this guide are outside the scope of this document and MED2020's support services. If the user is not familiar with basic computer, server and network administration, the user should seek professional assistance with the installation of a WinRecs database server, as MED2020 cannot be liable for catastrophic data loss. MED2020 does not undertake data backup or data recovery services under your site's standard support contract.

The information contained in this document is provided to assist with the installation of WinRecs suite and SQL server through WinRecs. This installation assumes that the Microsoft® SQL Server 2008™ is installed through WinRecs as all the required configurations for mounting and installing the database is already applied in the WinRecs. Hence the client does not have to reconfigure the Microsoft® SQL Server 2008™ to work with WinRecs

Management Studio is installed when installing Microsoft® SQL Server 2008™. This administrative tool is rather extensive and for the purposes of this document, references to Management Studio are limited to the tasks necessary to attach and detach WinRecs databases.

For facilities with limited data or computing requirements, the Microsoft® SQL Server 2008™ Express can be used. This free database software, also provided by Microsoft, provides limited data storage and is ideal for smaller WinRecs installations. However, this version of the database software does not provide additional support applications such as the Management Studio. If your environment has an installation of Management Studio, you might be able to use it to connect to, and administer, your Express database(s) and/or server(s). This document assumes that Management Studio is installed on the WinRecs database server.

Microsoft® SQL Server 2008™ is a commercial database server, generally used by facilities with larger data repositories or those who must support a large number of simultaneous connections.

Crystal Report is also installed as an integrated part of the WinRecs.

For more information on maintaining Microsoft® SQL Server database applications, it is recommended that you consult the Microsoft® support web site or your product documentation.

Contact MED2020 Client Services for more assistance with any information contained in this document.

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2. Technical Requirements

This section contains guidelines on what is required in terms of hardware (HW) and software (SW).

Client Work station Requirements

The following table specifies the minimum requirements for the WinRecs installment on the client work station:

Min. Required Refers to minimum specification by which the application can run; however, this is the base minimum

Min. Recommended: This is the basic level recommended by MED2020

Preferred: This is the preferred recommendation by MED2020

	Min. Required	Min. Recommended	Preferred
CPU	Pentium III	Pentium IV 2 GHz	Dual Core CPU
RAM	256 MB	1 GB	2 GB+
Video	800 x 600	1024 x 768	1280 x 1024 +
Monitor	15”	17”	19” +
OS	Windows 2000	Windows XP	Windows 7 +

Other requirements:

All systems should have a CD/DVD Rom

All system should have an internet access

If the user chooses the application to self-update, they must have write access to the installed WinRecs folder and its sub-folders.

Server Requirements

The MED2020 database must reside on a SQL server. The database requires (at minimum) SQL2000 with Windows server 2000. However, acceptable server specifications must be identified on a per-client basis by verifying the minimum requirements with Microsoft for the version of Windows and SQL that was chosen for the installation.

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Depending on how the system deployment is planned, as a single-server solution, a multiple-server solution, or a clustered solution, the computer hardware that MED2020 WinRecs and components will run on is important for acceptable application performance.

There are many factors that you must consider that can affect the hardware requirements. They include the following:

- Number of users the MED2020 WINRECS implementation will support and the way the application will be used, such as for intensive reporting.
- Number of servers and how they are configured.
- Microsoft SQL Server performance and availability.
- Integration of MED2020 WINRECS with the HL7 Service.
- Performance of your servers and the local area network (LAN).

Once an OS and version of SQL has been selected, the Microsoft website should be consulted for minimum required hardware specifications:

- ***SQL Server 2005 System Requirements*** (http://go.microsoft.com/fwlink/?linkid=53211)
- ***SQL Server 2008 System Requirements*** (http://go.microsoft.com/fwlink/?LinkId=149063)

MED2020 supports up to the latest version of Windows and SQL. At this time (Windows 2008 R2 and SQL 2008 R2). However, minimum hardware requirements are set by Microsoft for the specific versions selected.

The only requirement outside of the Microsoft specified specifications would be the Hard disk space required to fit your database. A blank (with system records) database is about 1 GB. On average you will require 1GB per 10000 records plus any space required by temp tables and log data.

Note: Your software license with MED2020 does not provide a commercial version of these software products. This is available from MED2020 as a separate license. Please contact sales@med2020.ca or call 1.800.461.2020 for more information and a quote.

3. Microsoft® Reseller Licensing

The Microsoft® SQL Server Runtime license for example allows a customer to use SQL Server only with the MED2020's application. The customer is restricted from using this SQL Server software to run other applications or to develop new applications, databases, or tables. The license rights reflected in the Microsoft SQL Server Runtime EULA restrict customers from using the SQL Server software to:

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- Run applications other than MED2020's application
- Develop new applications
- Create new databases or tables (unless the MED2020's application requires a new database or table be created)

Note: Due to collation of the WinRecs Database, it is stated in the administrators guide that WinRecs must run on its own SQL Server and not be shared with other applications.

4. Before You Begin…

Prior to beginning installation of WinRecs, please ensure that you have everything you need to complete the installation available to you. This is particularly important with respect to your license key. If you do not have this available to you, please contact MED2020 during normal business hours.

Prior to installing any software, please ensure that you have made backup copies of your sensitive data. Also please ensure that you have your backups readily available, and that you know the exact path to your databases. MED2020 cannot be held responsible for data loss, nor can MED2020 assist with data backup and recovery. Instructions for backup and recovery are outside the scope of this document.

Note: It is recommended to turn off any antivirus program for the installation as it could interfere and block some of the files and/or processes from completing.

4.1 Choosing a version of SQL Server

Before choosing a version of SQL Server to install, it is important to understand the differences and limitations of each variation.

The preference is that the SQL server Standard version to be installed through WinRecs; this allows the configuration file to be loaded into the SQL installation (it is still modifiable by user). However, if there is an existing SQL server, our install creates the users and mounts the WinRecs database.

4.2 Installation package

The automated full installation package is provided in self-extracting EXE and MSI; they can be accessed through one of the following venues:

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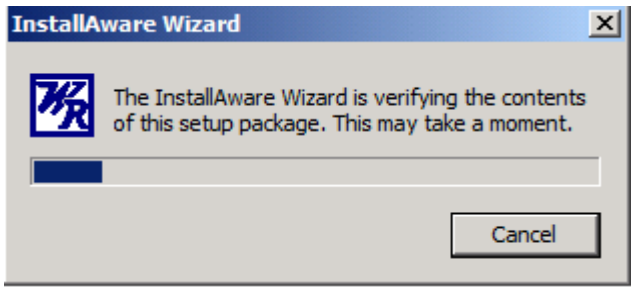
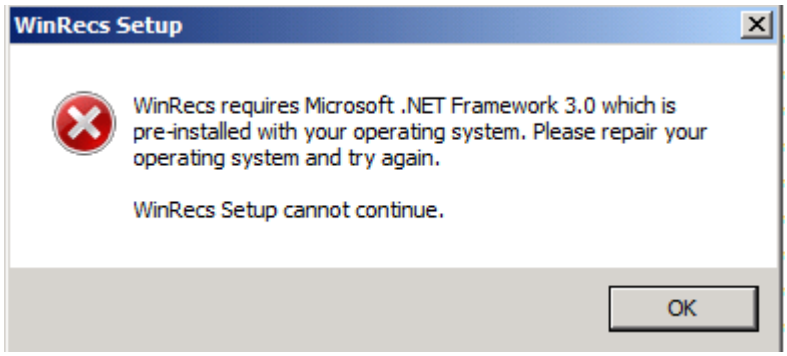
1. On a CD
2. On FTP site to be used by each client

4.3 Installation Preparation

Insert the installation disk; Double click on the WinRecs Installation icon:





If the above window appears, then follow the instruction below.

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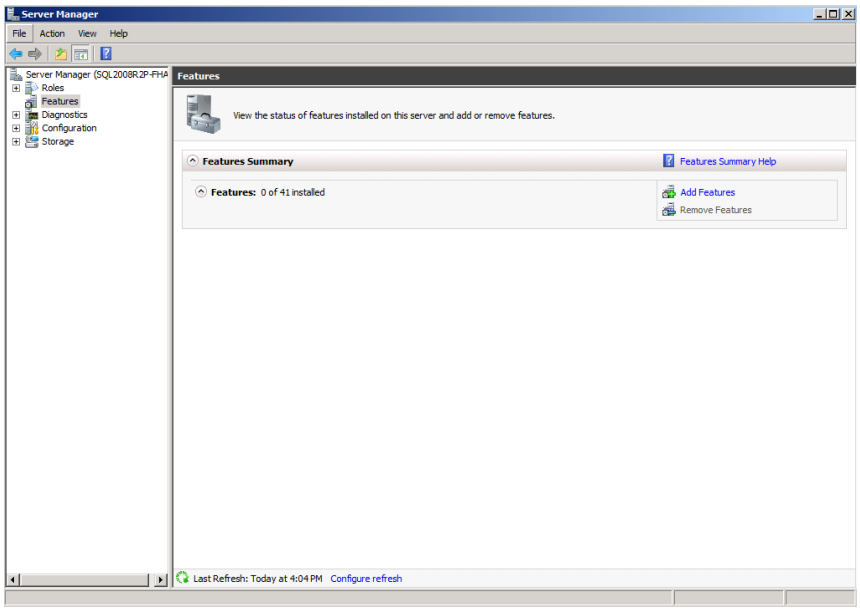

If the above window appears, the following should be added as a feature to the server (following screen shots):

1. Open **Server Manager** from Administrative Tools. In Server Manager, right-click Features, and in the context menu select “Add Features”.
2. Expand **.NET Framework 3.5.1 Features** and check “.NET Framework 3.5.1”
3. Click **Next** and then **Install** to install the feature and attempt the installation again.
4. Once complete click **Close** to complete the wizard.

Note: We can also run this from Command line:

servermanagercmd.exe -install NET-Framework-Core

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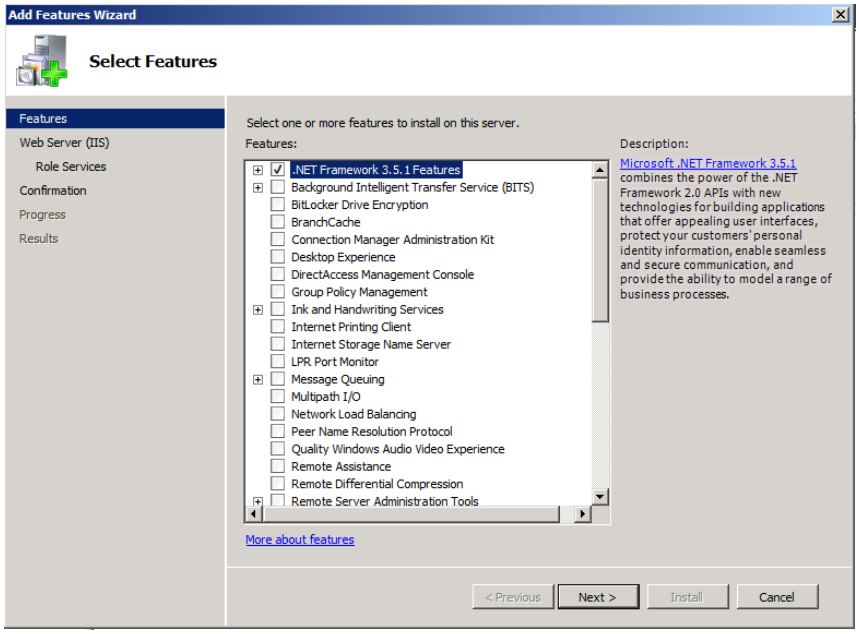
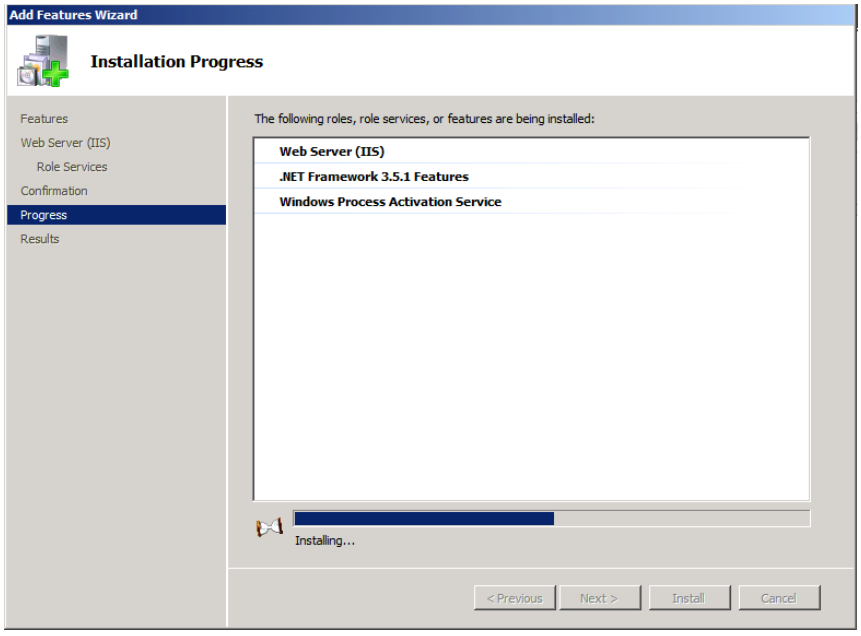


Select from the features list .NET FrameWork 3X and click on “Next”



The required roles, role service/features are automatically installed

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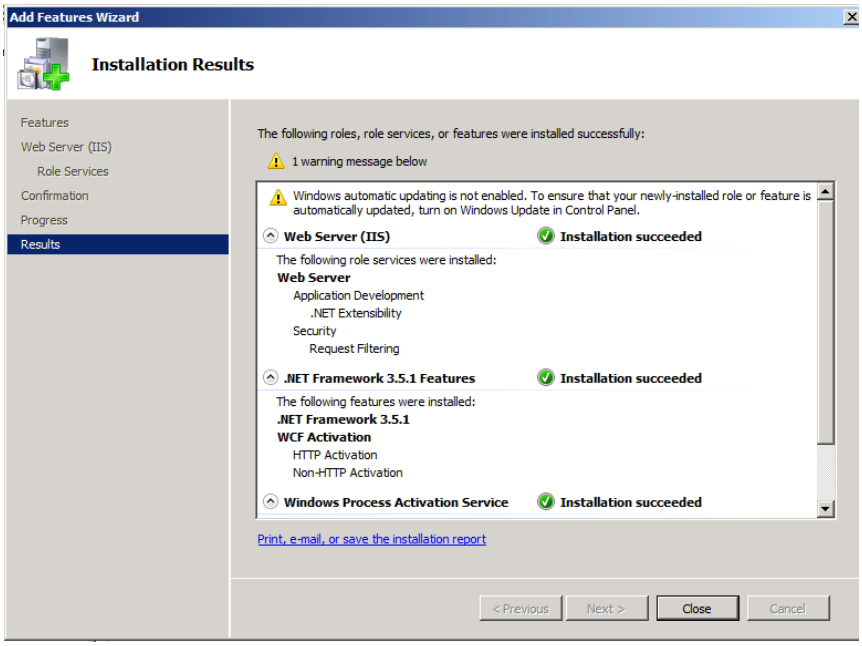

Once it is complete, click on “Close”

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5. WinRecs Installation Wizard

Once the pre-requisite for launching is added (i.e. .NET FrameWork 3X), the WinRecs installation wizard automatically verifies the package content.

Click on “Next”

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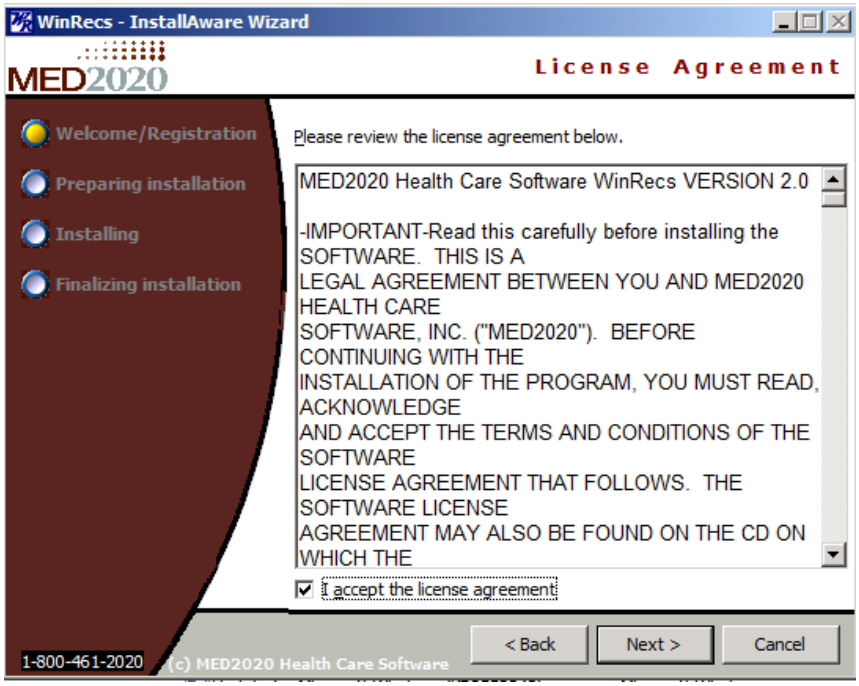
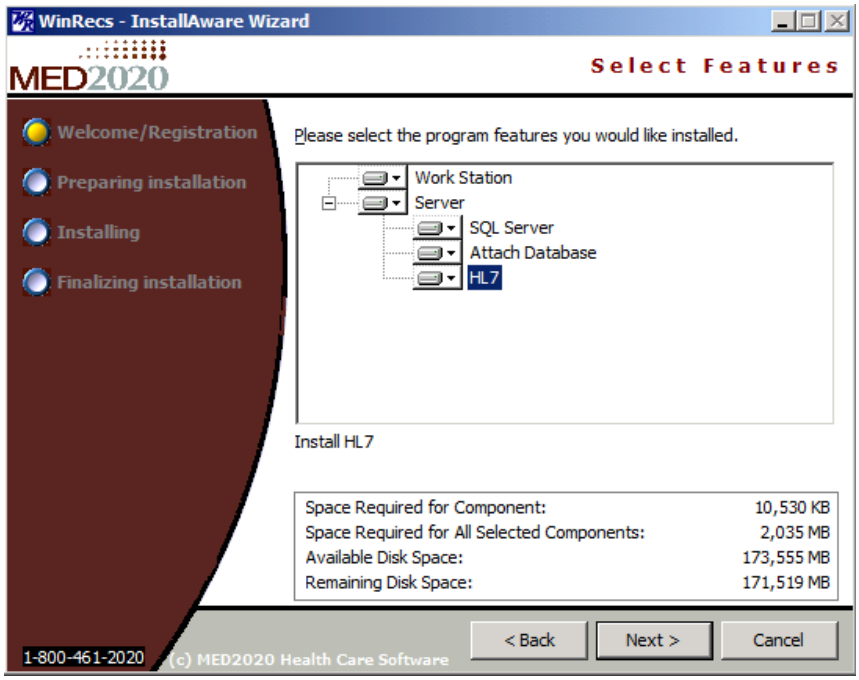


Read and accept the Licence Agreement and click “Next”



Client can either choose to install WinRecs on workstation and/or server. For installing on the server there are 3 options. The table below illustrates the options and their outcome; after selection click “Next”

Warning: Workstation must remain checked if installing HL7

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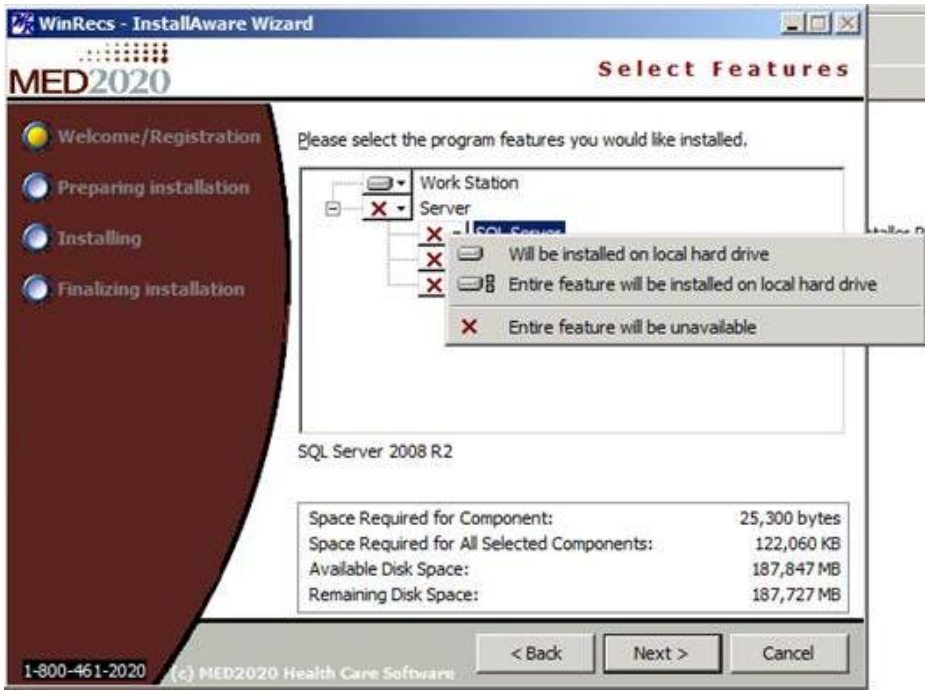

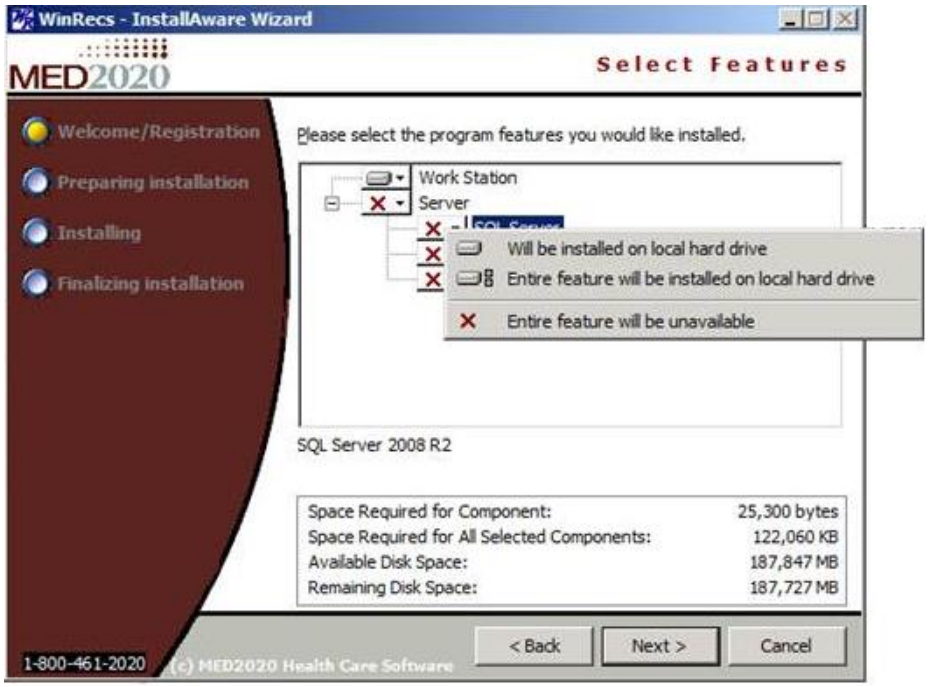

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Workstation: Installs WinRecs Client only

Server Installation: This option prepares the server side (including the SQL server installation, WinRecs DB mounting, and Interface) for WinRecs

- SQL Server: Installs the client choice of SQL Server (i.e. MS SQL Server 2008 R2 Enterprise, Standard, or Express) and add the appropriate MED2020 WinRecs and HL7 users.
- Attach Database: Mount the client choice of DB files to the installed SQL Server. This DB can be either the test or live.
- HL7 Interface: Install the MED2020 HL7 interface as service with configuration

Fill all the fields and click “Next”

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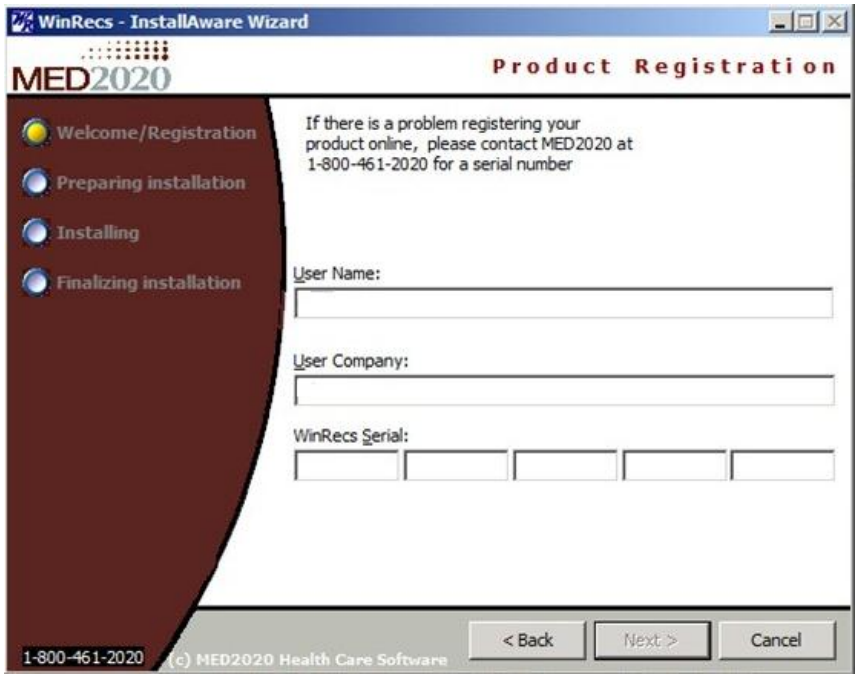
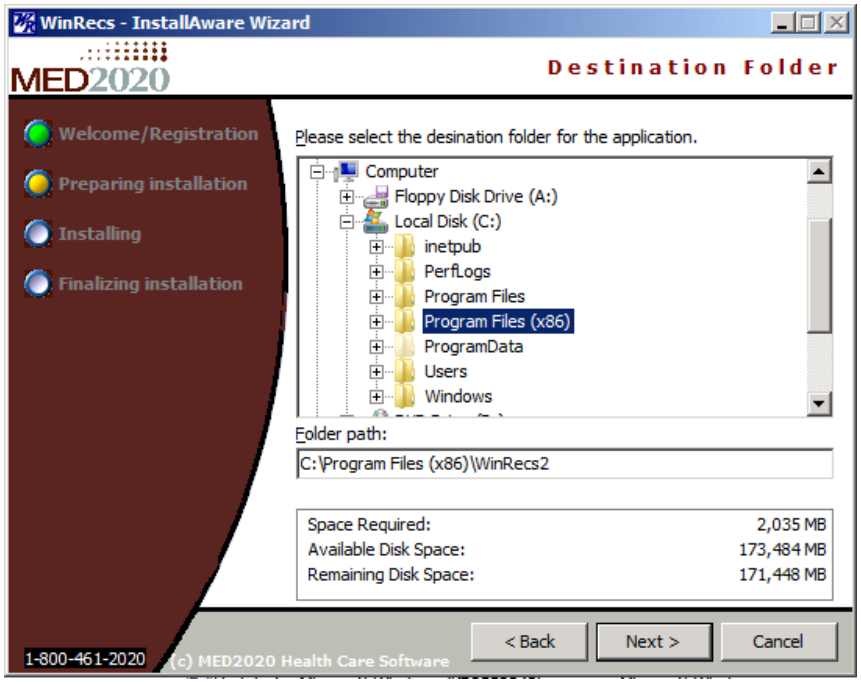


Enter the username and WinRecs Serial number and click “Next”



Select or accept the destination folder and click “Next”

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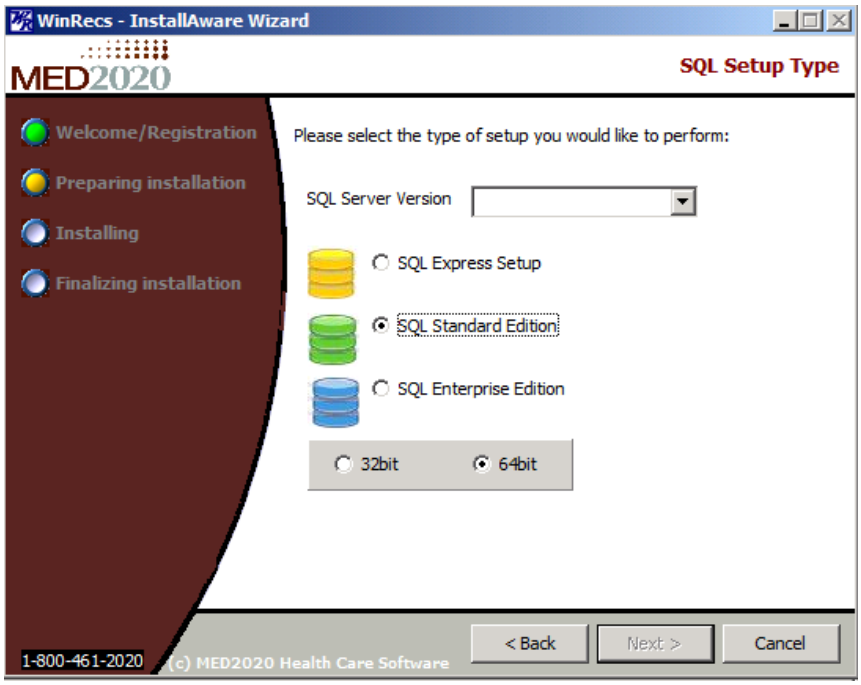

- From the SQL Server Version drop down menu select the appropriate MS SQL server version
- Select the appropriate MS SQL Server type
- Select 32 or 64 bit version
- Click Next

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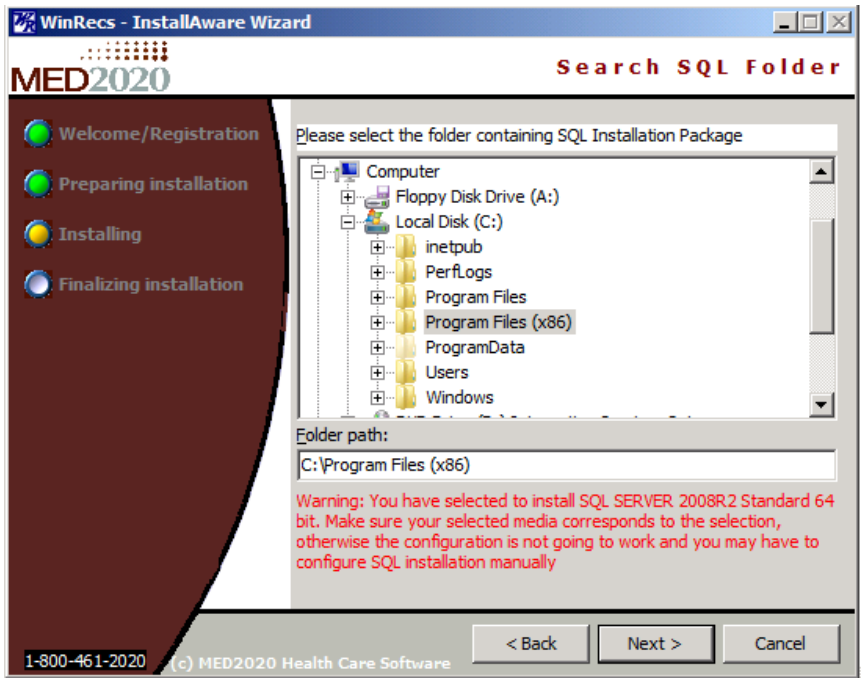

The user can define the physical path for SQL server install files. The folder for SQL server is either delivered by MED2020 or the existing one is used.

SQL server Installation Wizard

After setup has been initialized the following screen will appear.

Note: The recommended MS-SQL installation configuration is automatically populated by the MED2020 installation package; any issues due to changes to the pre-set configuration should be discussed with a Site IT specialist

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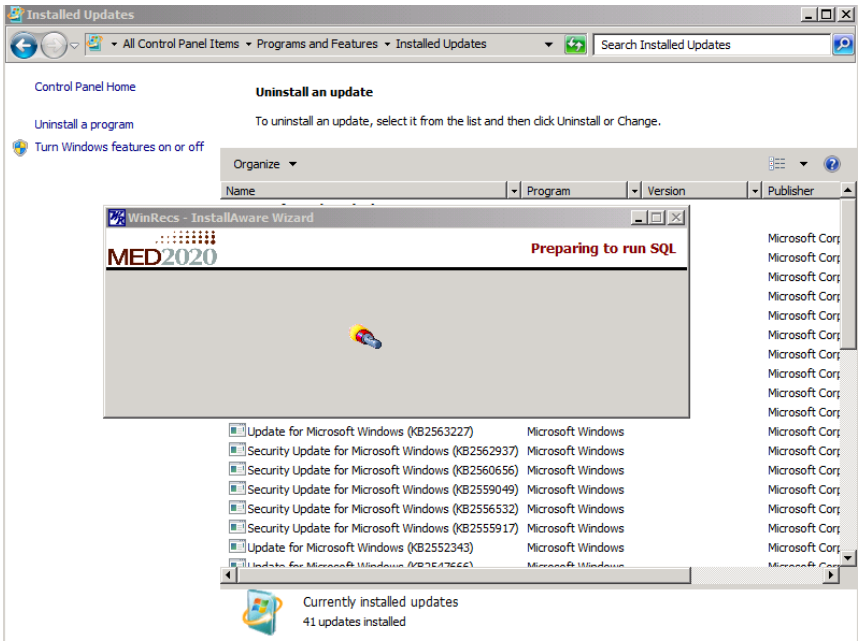

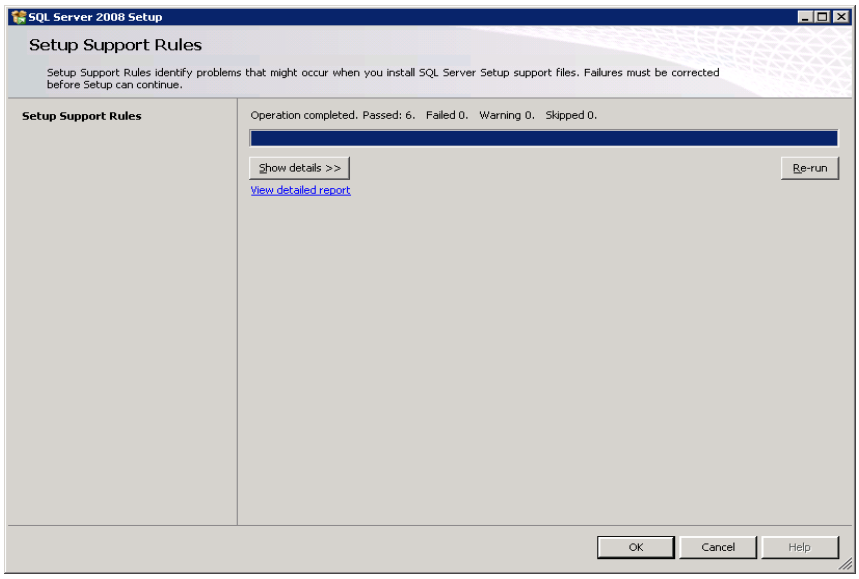

Click OK

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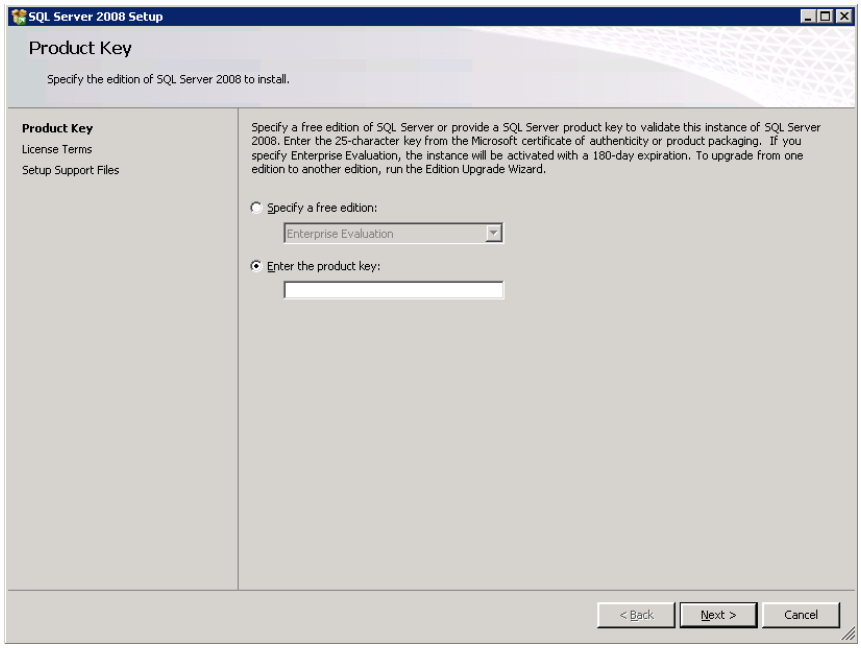
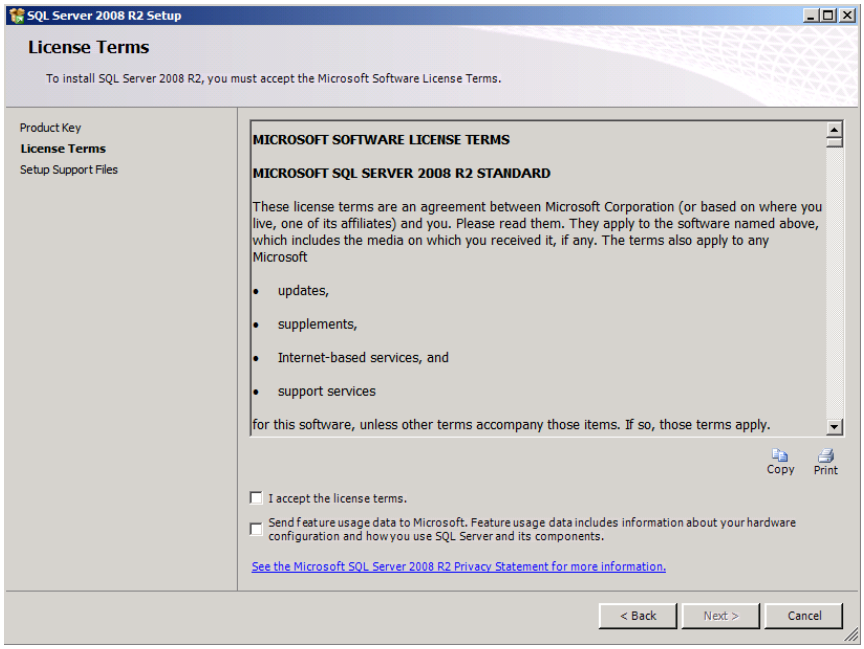
Setup will prompt you for a product key which is required unless evaluation option is selected.



After setup has been initialized the following screen will appear.



Setup requires:

- licensing agreement to be accepted
- support files to be installed on your server to proceed.

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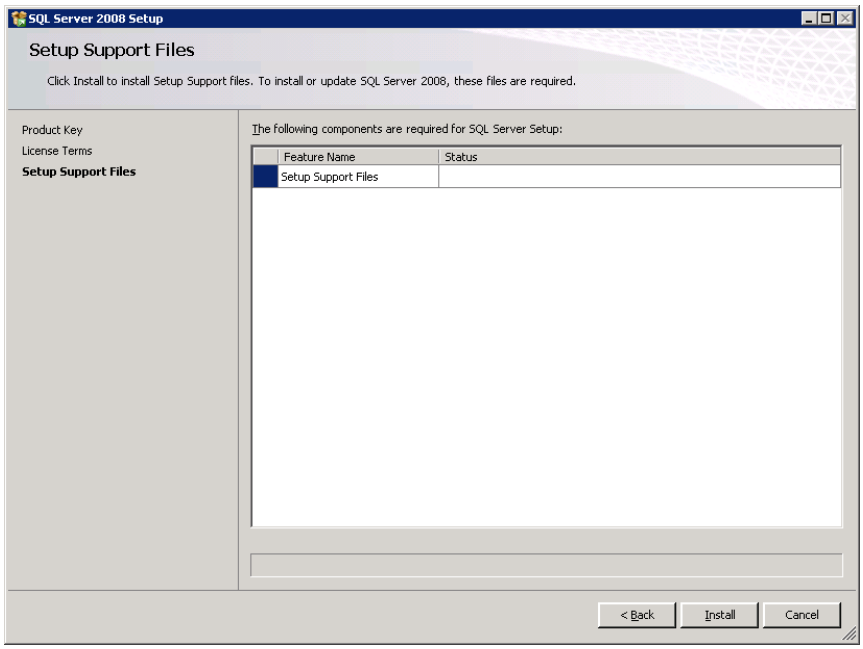

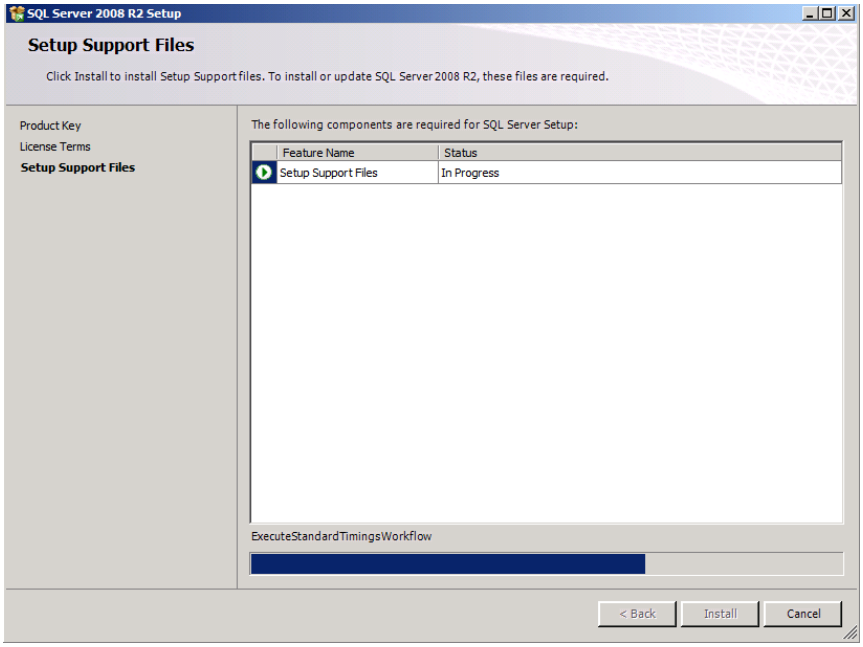

After selecting install the following screen will appear.

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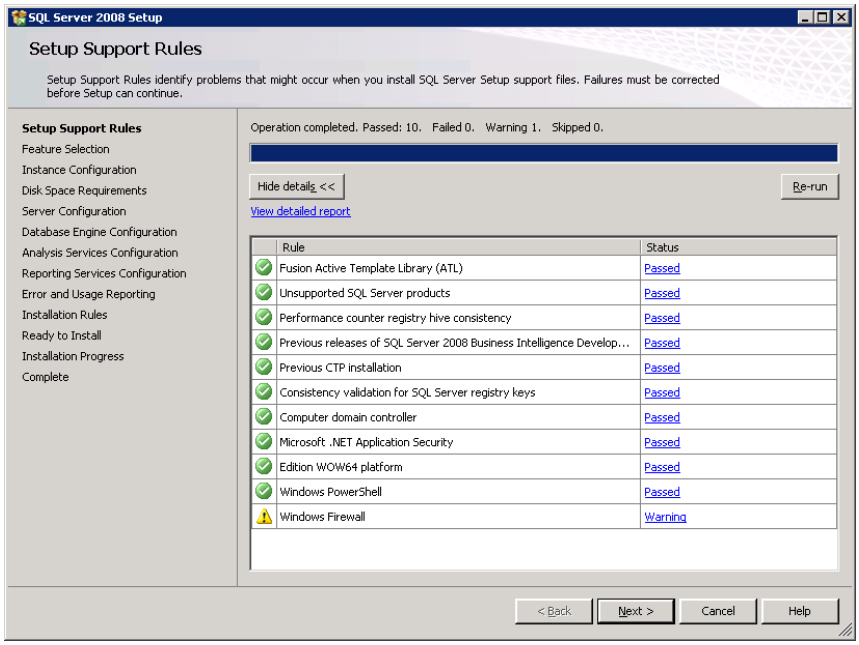
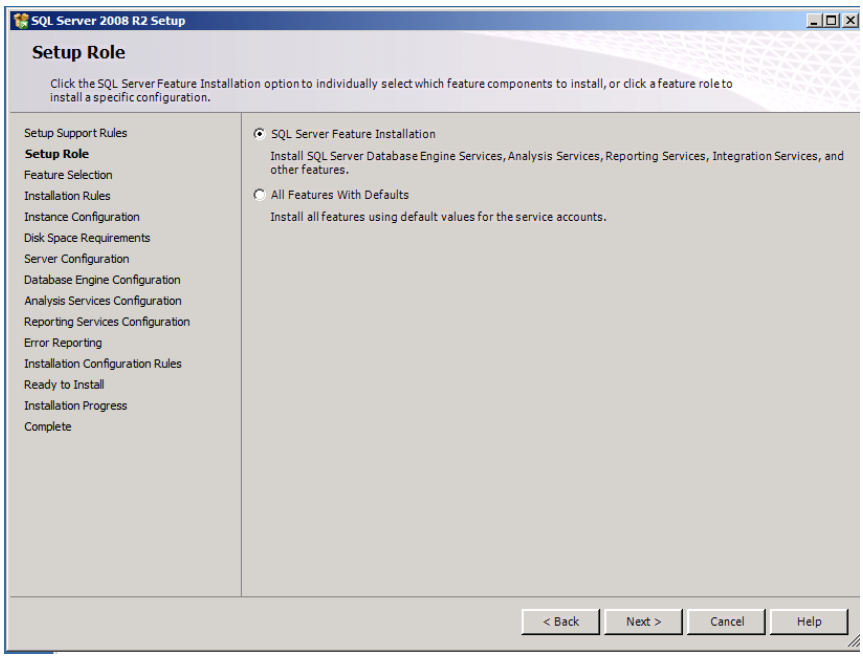
Once the support files have been copied, any rules or requirements that the server does not meet will be listed here. Any errors will have to be corrected for the installation to proceed.



If there are any items in red, contact MED2020 or MIS support



Click Next

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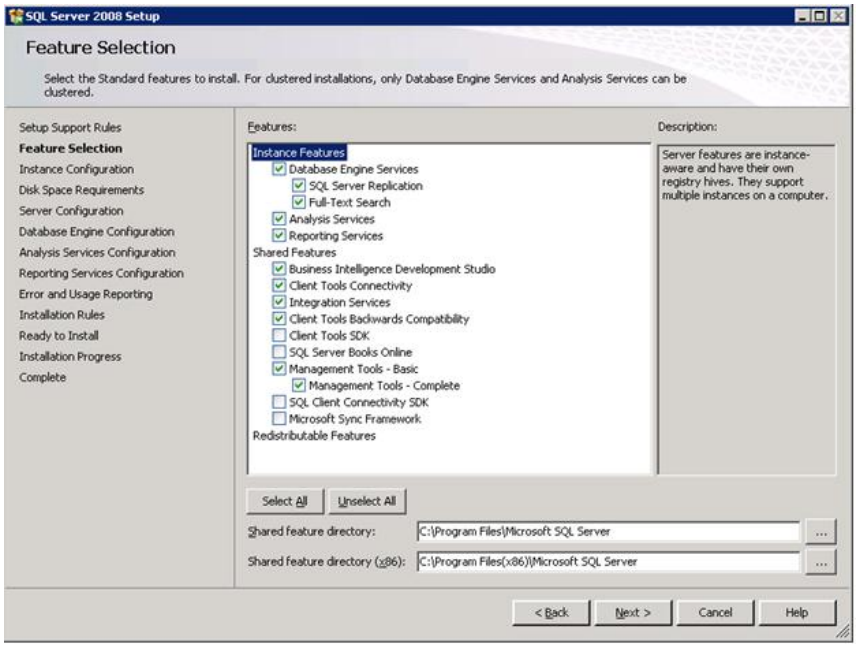
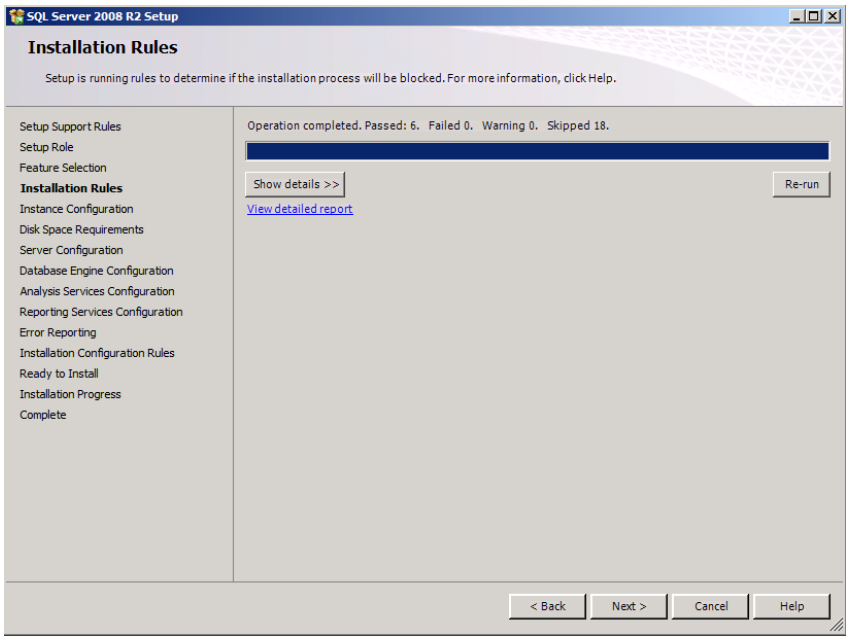


Depending on the selected MS-SQL type (standard, Express, or enterprise), the installation package will automatically select the applicable features.

Click Next.



Click Next.

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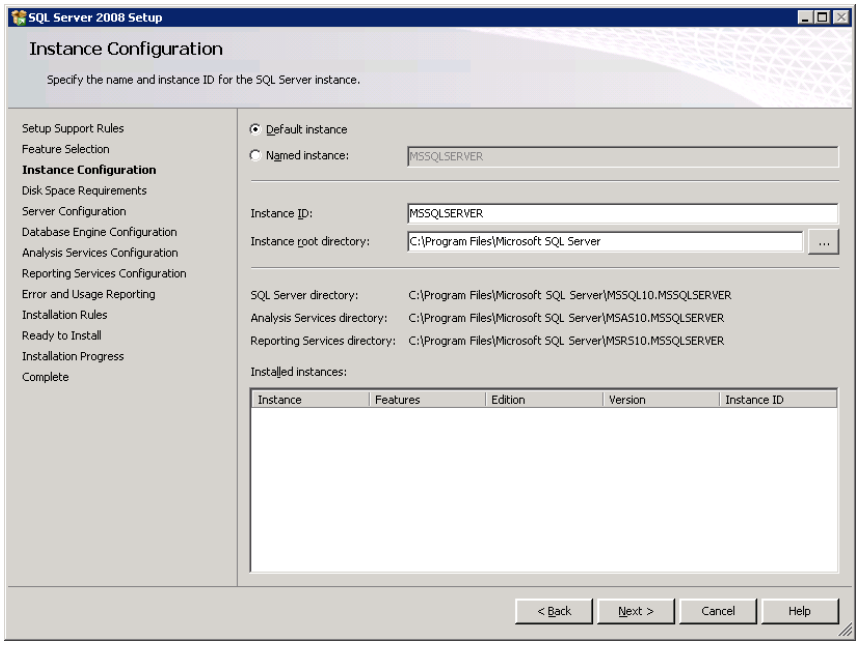
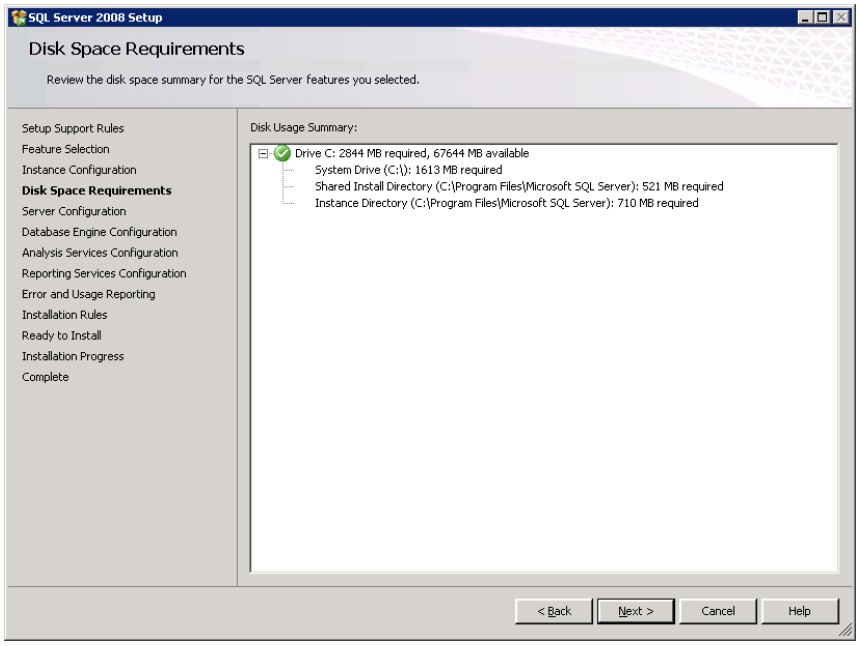


Server instance configuration is automatically populated.

Press Next.



Click Next.

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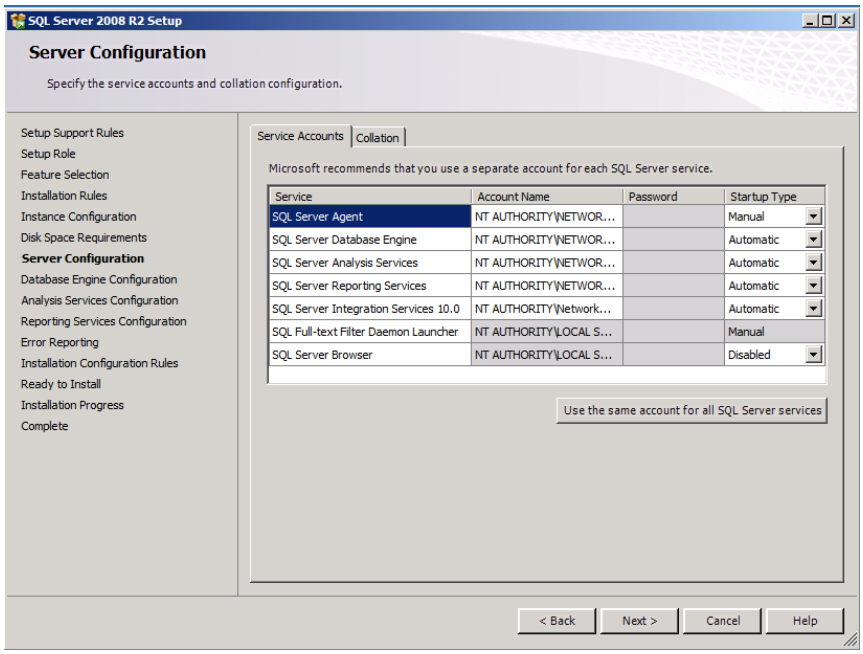
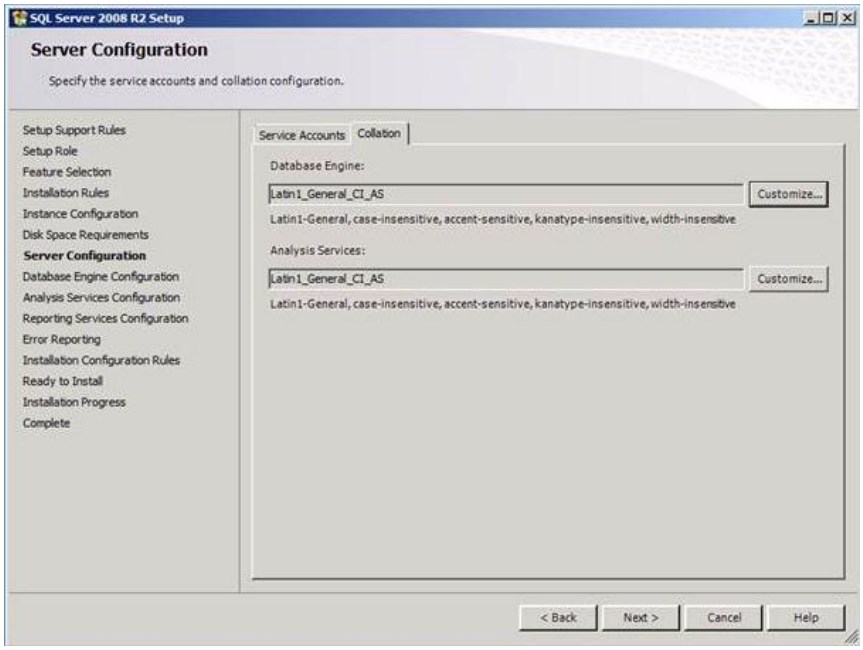


SQL services need to know what system accounts to run as. The MED2020 recommended accounts are automatically populated The Account Name selection above will ensure that services will start properly.

DO NOT click Next; select Collation Tab.



For both Database Engine and Analysis Services press Customize and verify the settings match the one appeared on images below.

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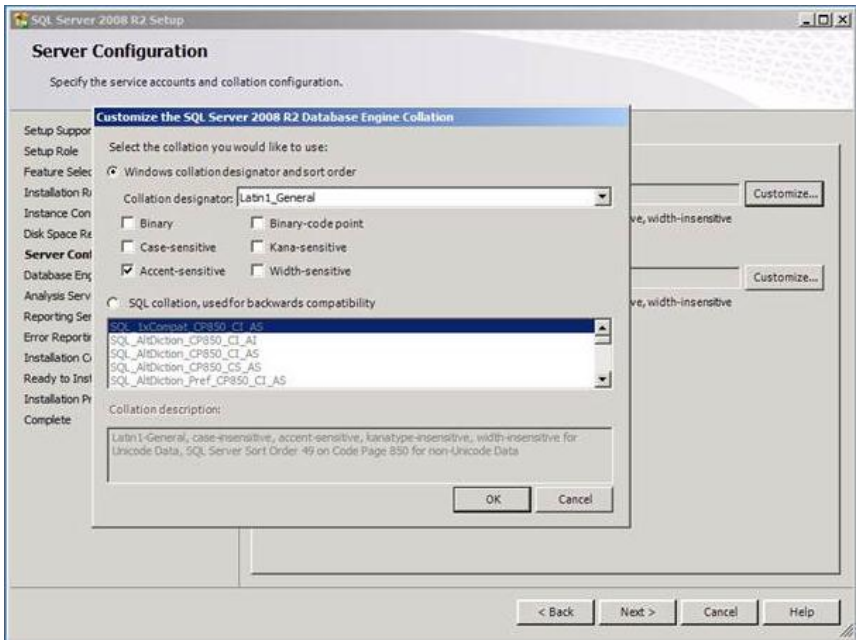

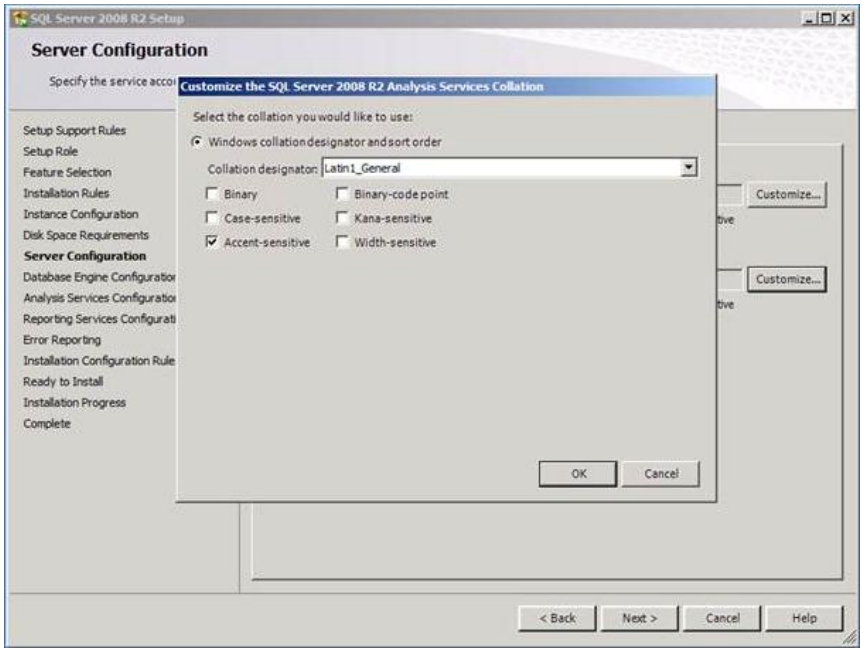

Once the Collation setting is verified, click Next

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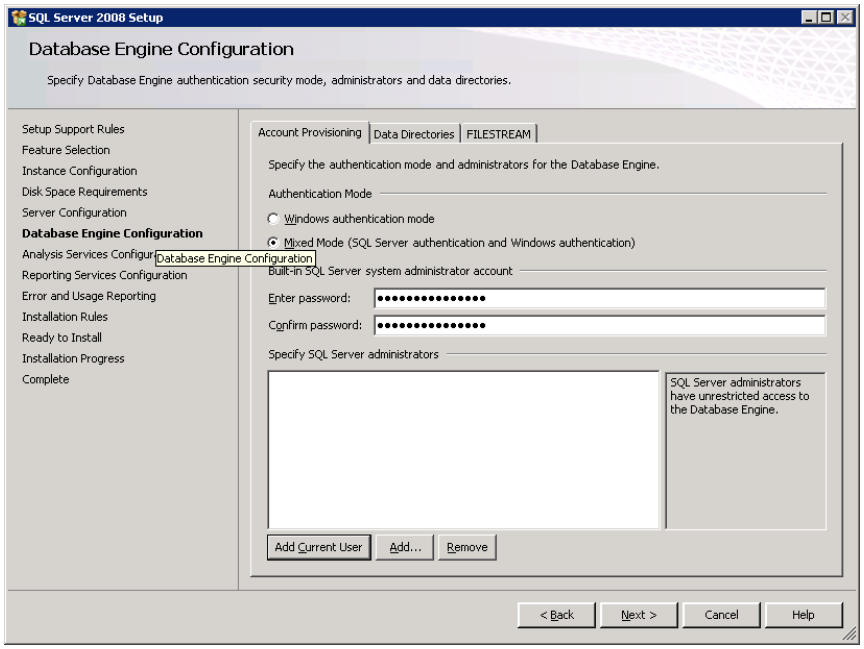
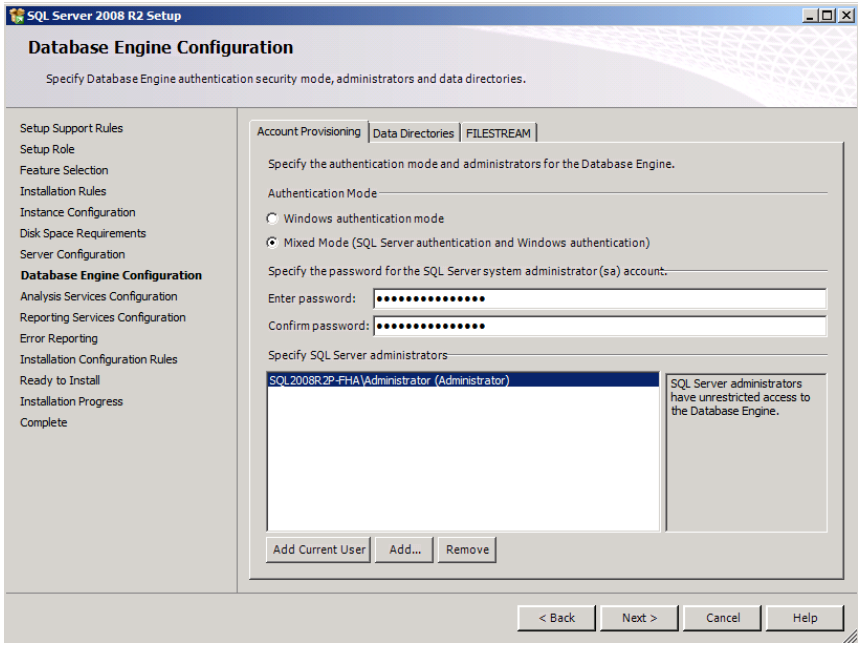


For WinRecs to function properly choose Mixed Mode authentication. The user cannot modify the SA user password



Specify the MS-SQL server Administrator by selecting either Add Current User or Add button.

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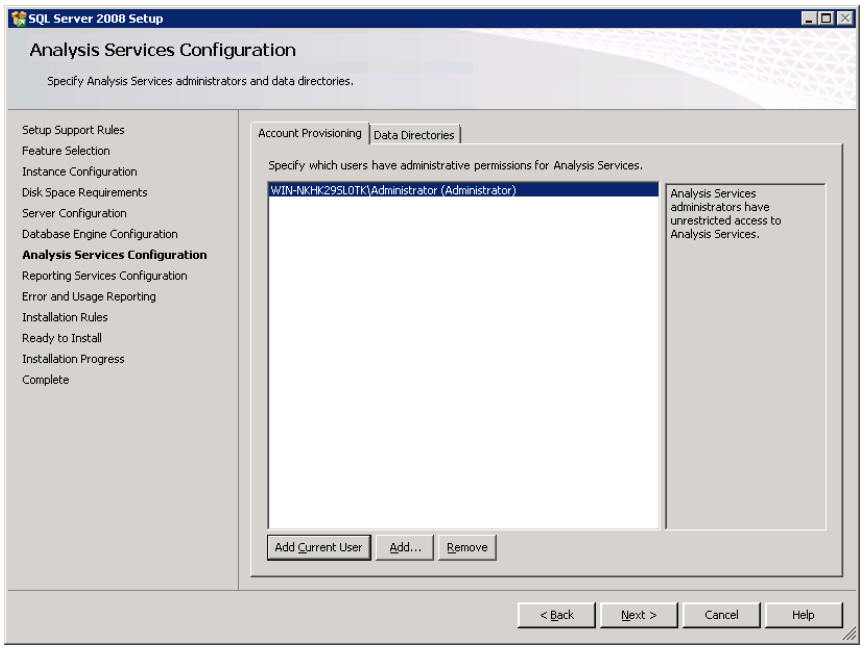
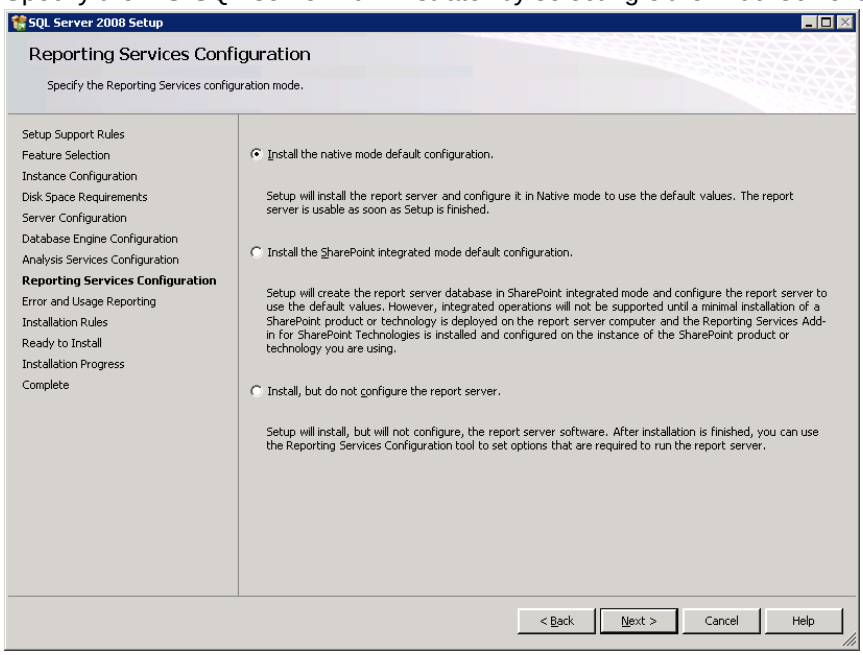


Specify the MS-SQL server Administrator by selecting either Add Current User or Add button.



Accept default and click Next

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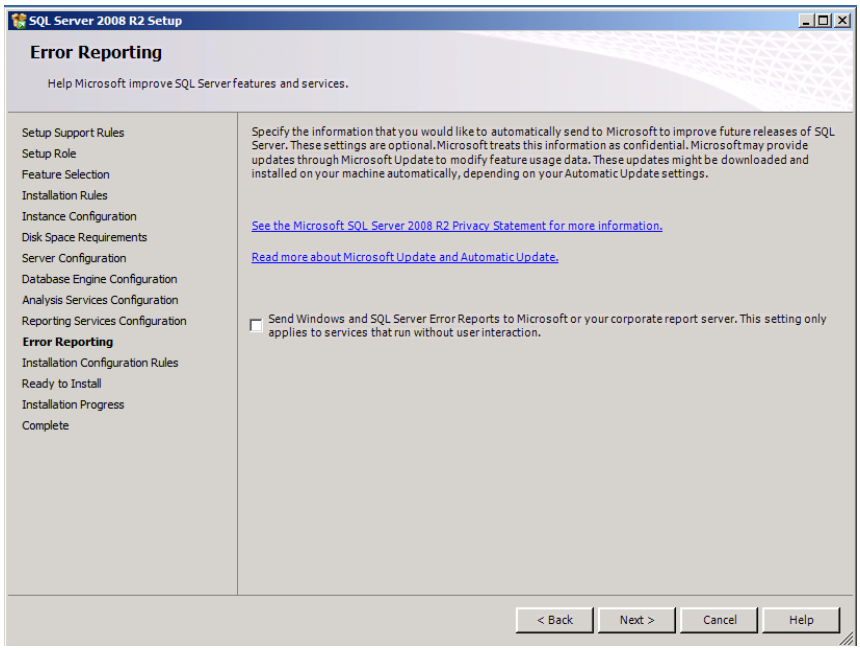

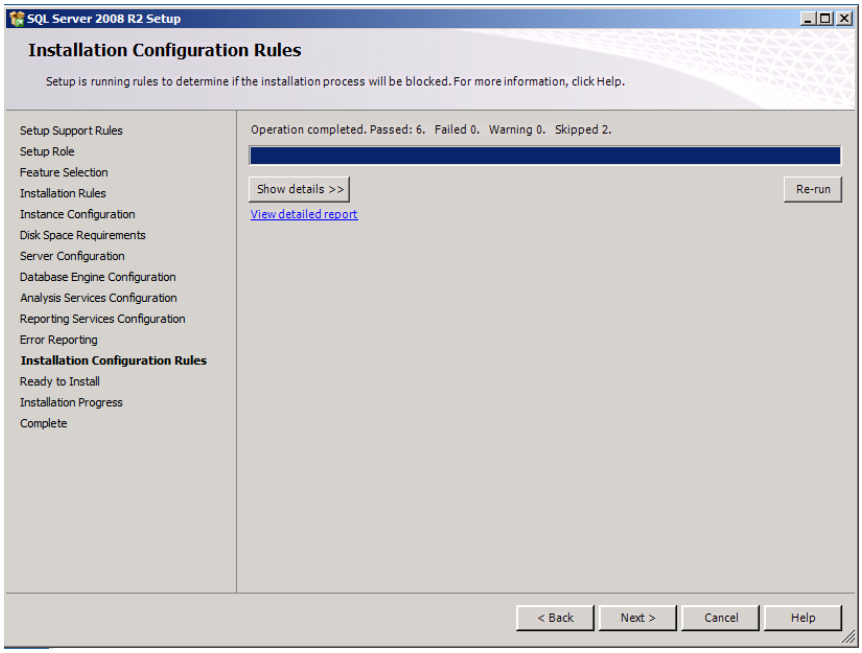

Click Next

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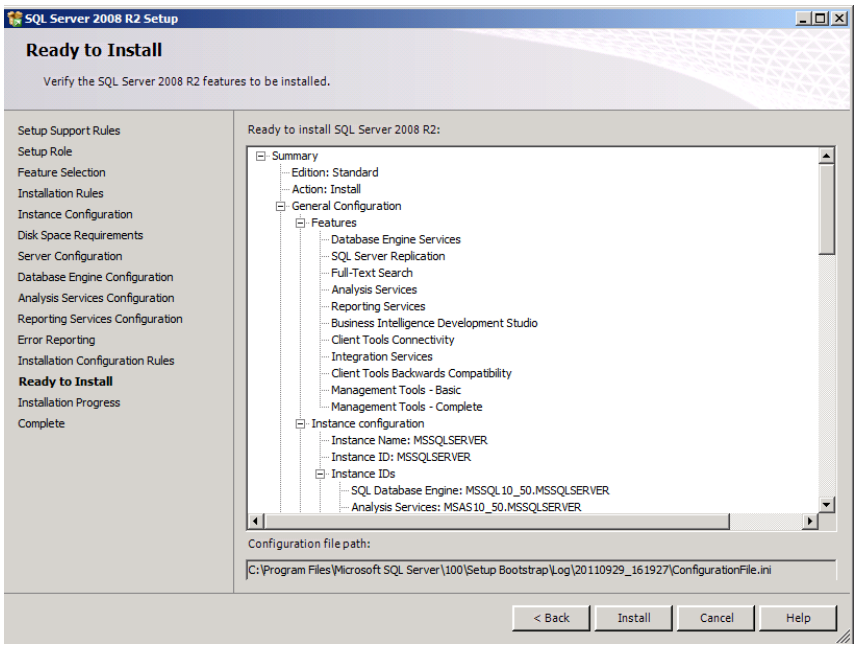
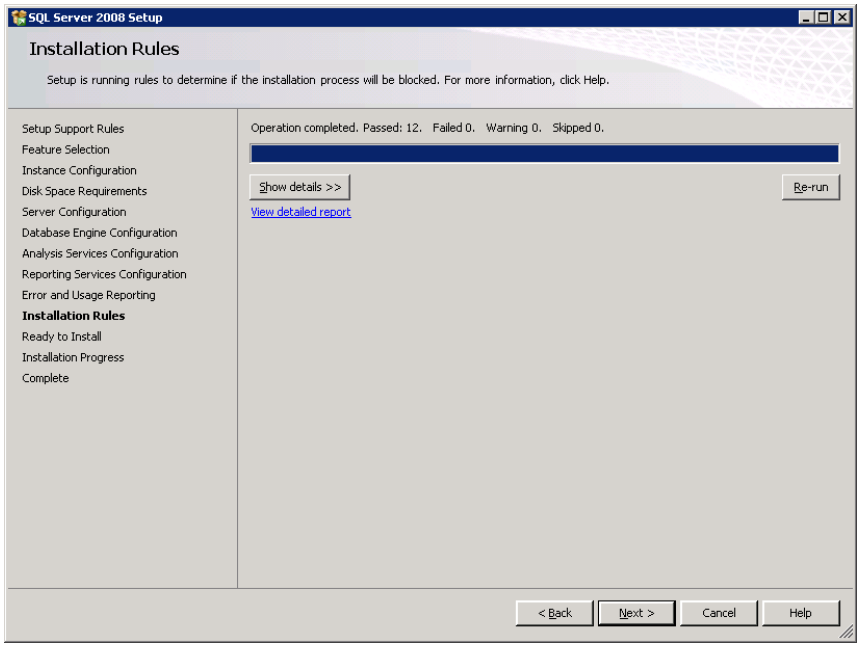


Click Install. Installation will re-validate the rules and may take several minutes depending on your server.



The setup will check for support rules to determine if the server meets the installation requirements. Click Next

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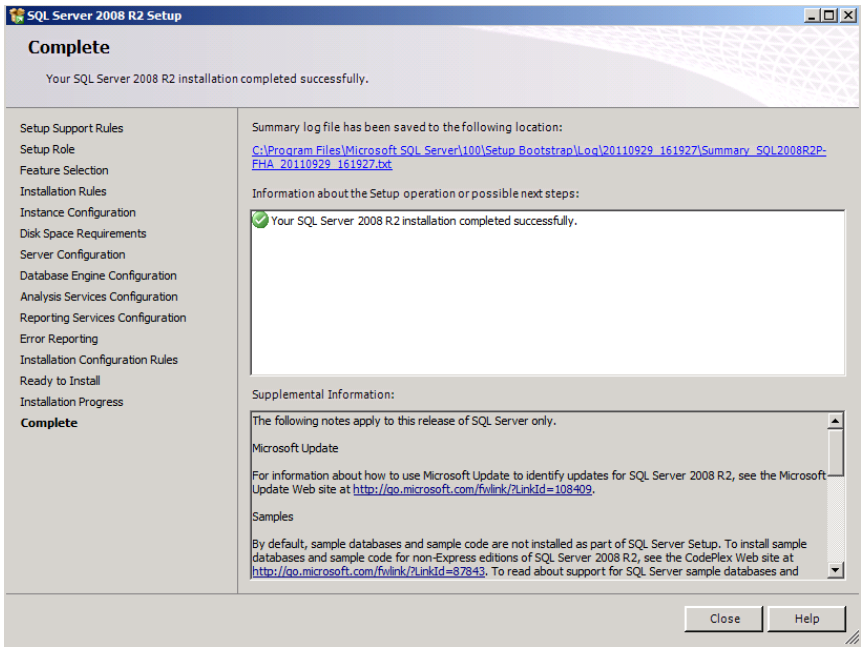
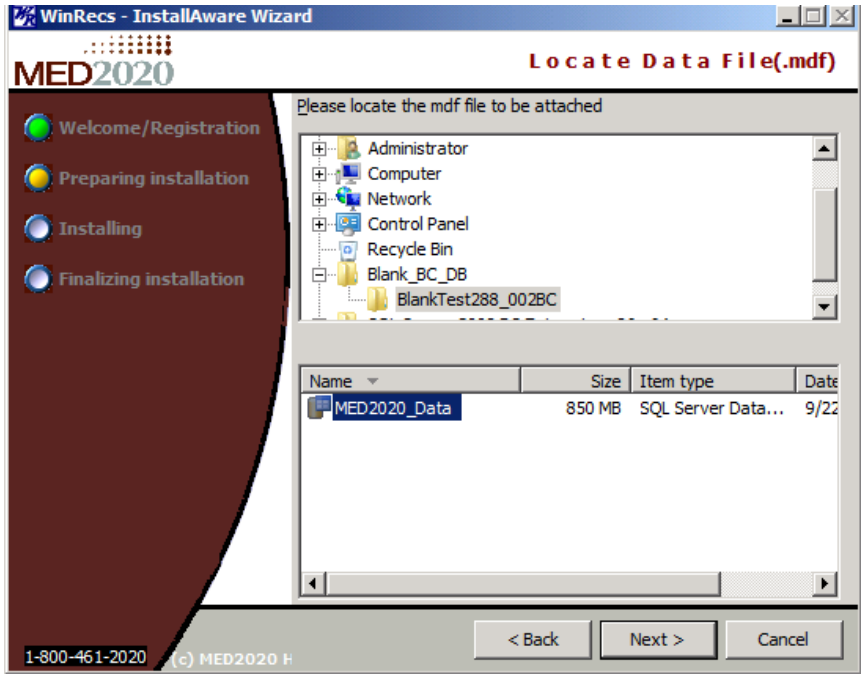


Installation is complete. Click Close to get back to MED2020 Install.



Select the path to the DB file provided by MED2020. This data file can be either a live or test data file; click Next

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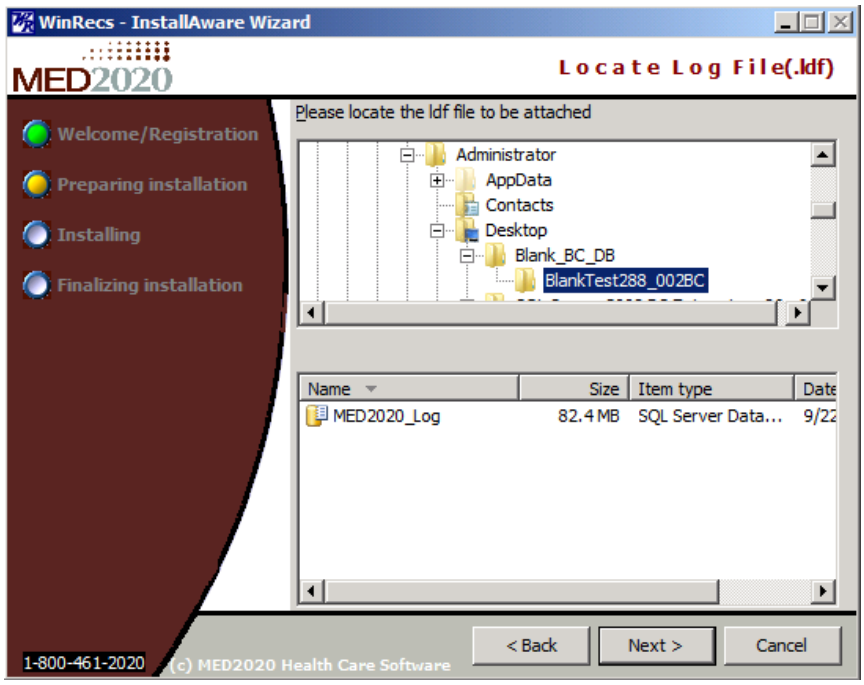
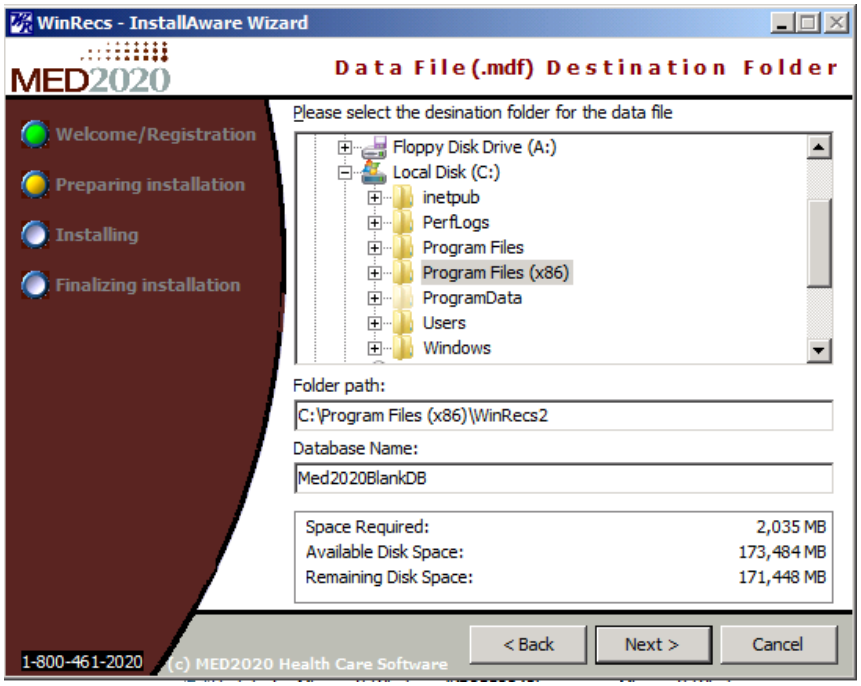


Select the path to the DB log file; click Next



Select destination of physical path and the desired file name of WinRecs database; click “Next”

Note: Once the database physical path is determined, it would be difficult to change it.

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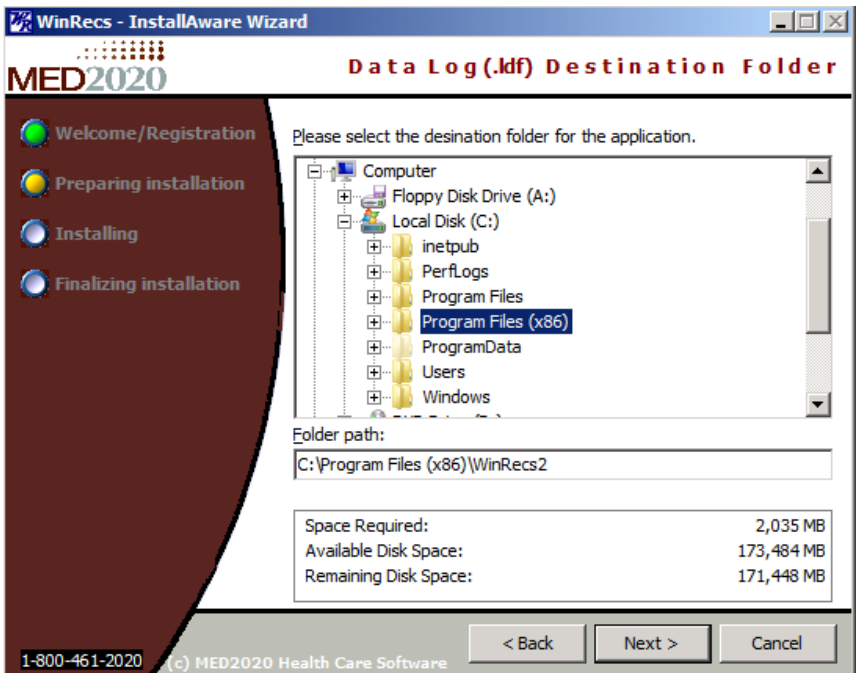
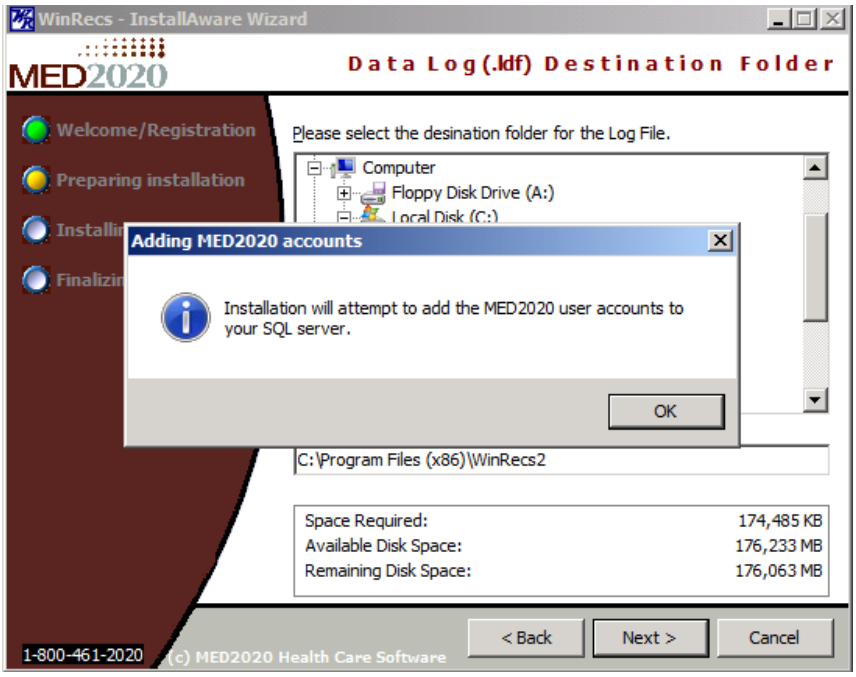


You may set the path but not the name. The name remains the same as the database name (.MDF); click Next



MED2020 installation package adds the MED2020 user accounts to the installed MS-SQL Server;

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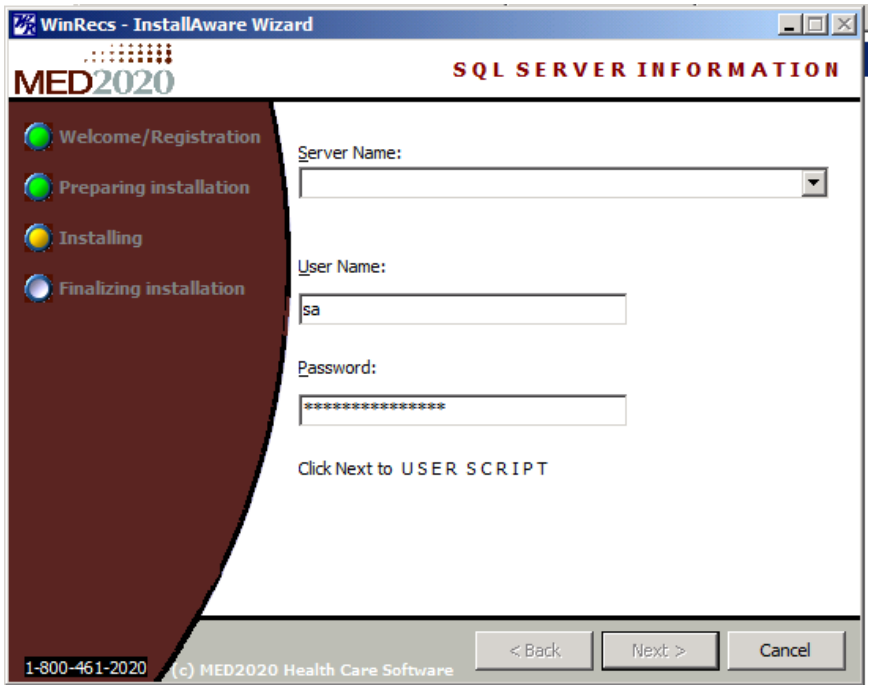
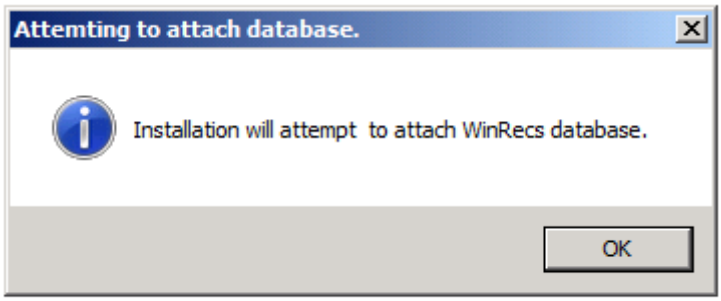


Select the server name for the installed MS- SQL Server and provide the proper username and password for connecting to it. If MS-SQL server is just installed by the MED2020 installation package, you can use the default username and password; click Next for the MED2020 users to be added.



MED2020 installtion package now mounts the provided database files (.MDF and .LDF)

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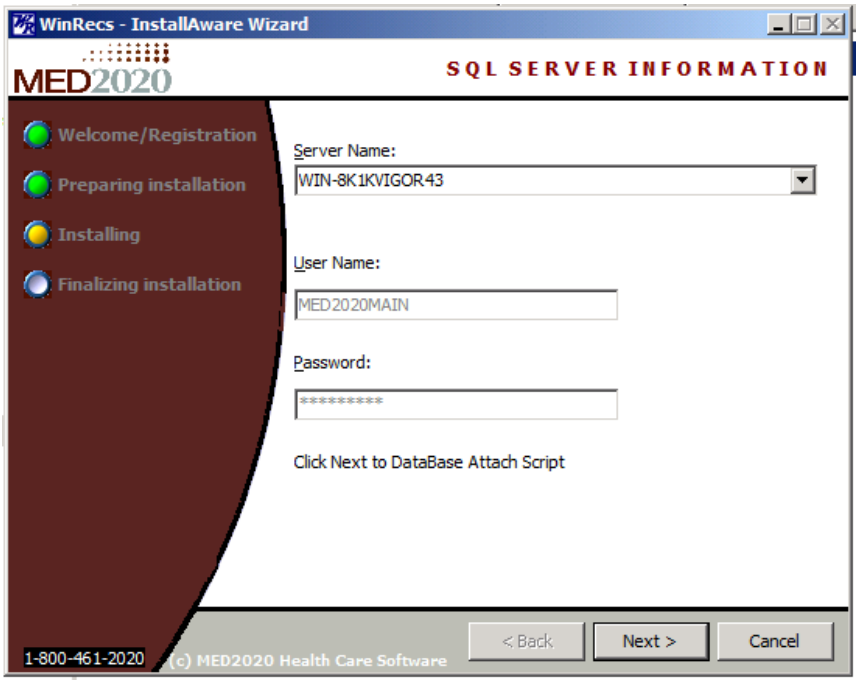
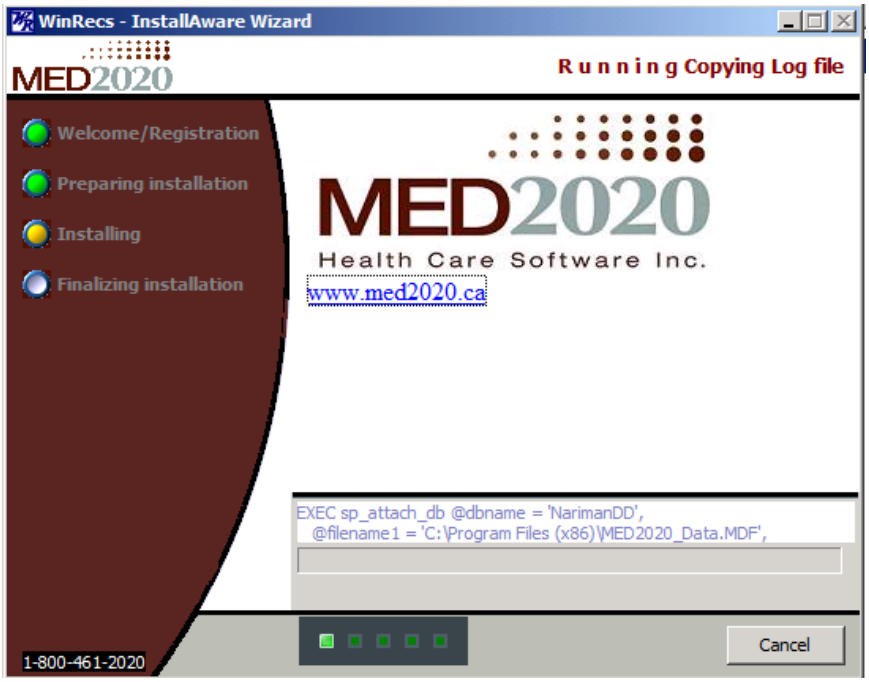


Select the installed MS-SQL server name and press Next for Database files to be mounted.



MED2020 installation package runs the database mounting script.

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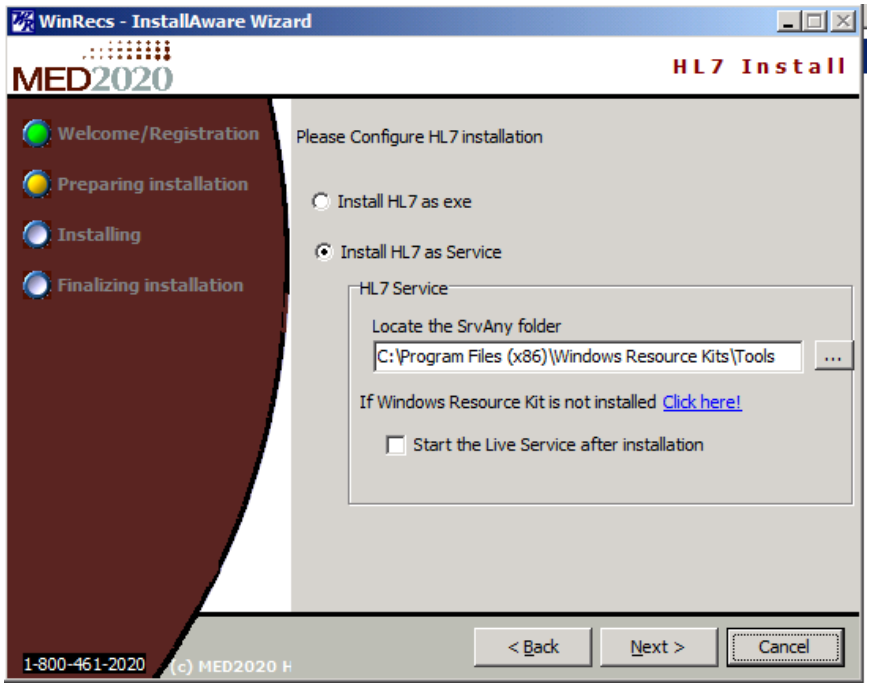
6. HL7 Installation

Once the MS-SQL server is installed and configured, the screen for HL7 installation appears. HL7 can either be installed as an “exe” or “windows service”. If the HL7 installation as service is selected, provide the path to the installed Microsoft SrvAny. If Microsfot SrvAny is not installed, a link to its download is provided in this screen.

Note: If you are running a version of Windows newer than 2003, such as 2008 or 2008 R2, a message will come up when installing the service kit explaining that not all components of the package may be compatible.

Please note that the components needed for HL7 to run as a service are compatible and do work.



Check the “Start the Live Service after installation” for the servcie to automatically run after the MED2020 installation is over.

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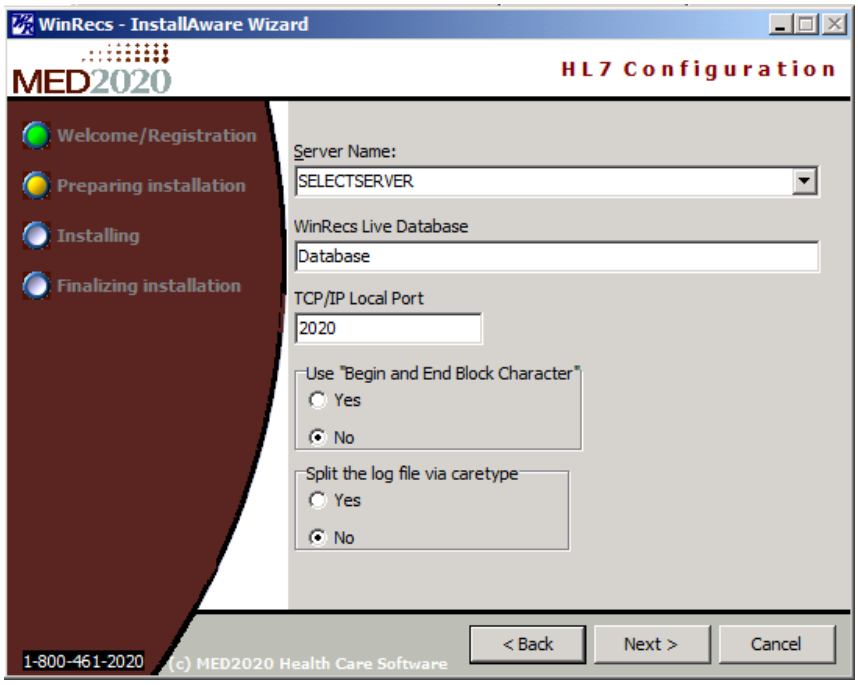
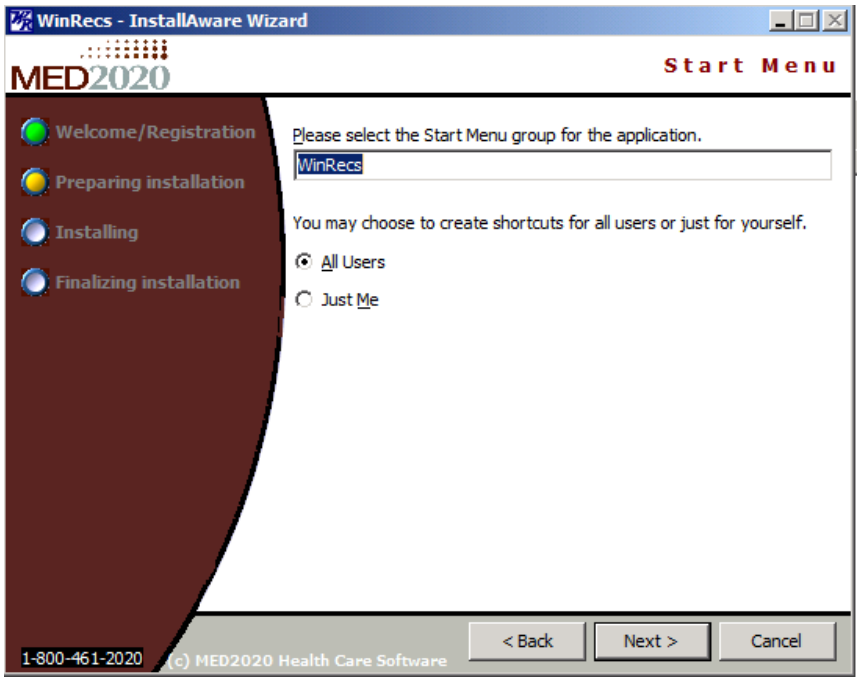


In this screen you can provide the default HL7 configuration that you want to appear for each time the HL7 is launched. You can use the default values in this screen.



Type in the Start Menu Group name and click Next.

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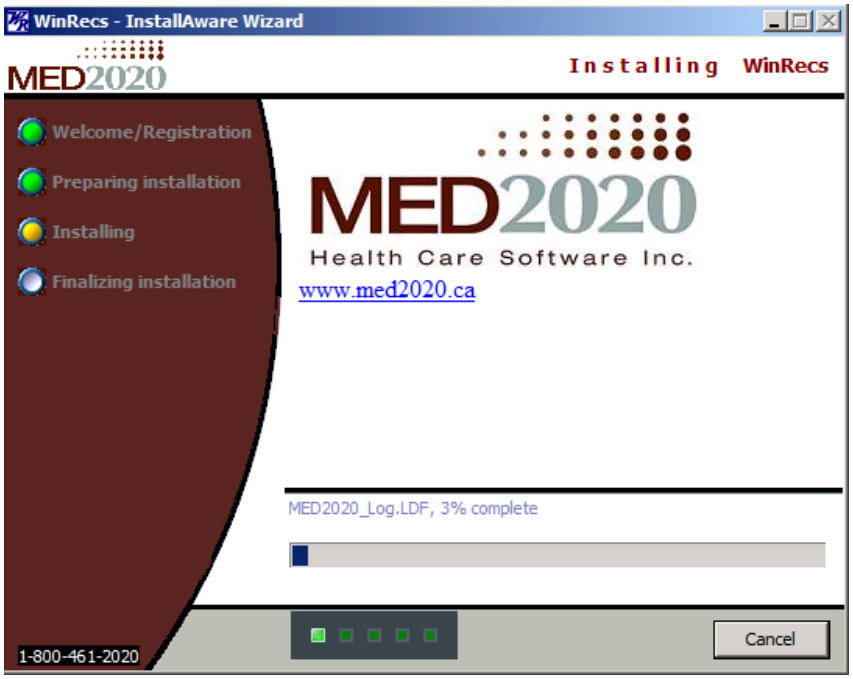

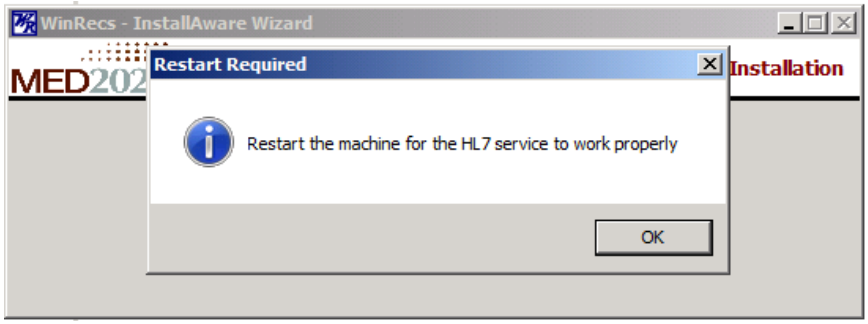

Restart the machine after the installation for the HL7 service is completed.

Note: Remember to restart the system after the installation is over for the service configuration to be applied.

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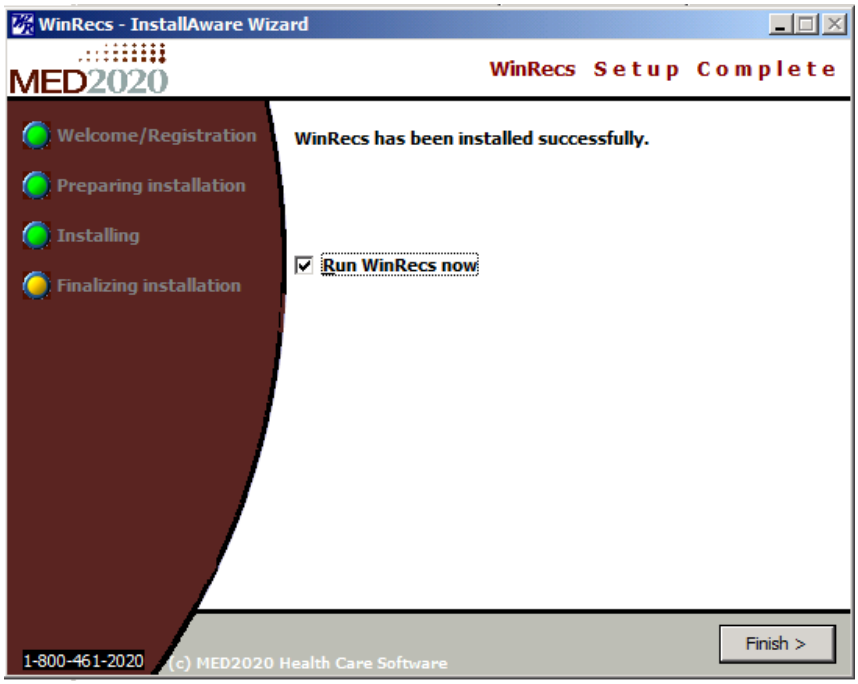
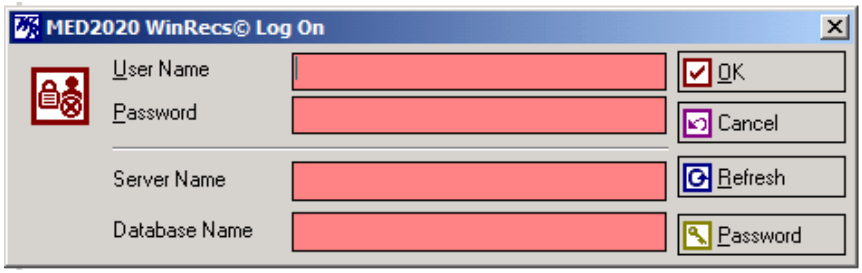


The setup is complete, click Finish. If the “Run WinRecs now” is checked, the WinRecs Login window appears (See Below).



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Appendix 1 WinRecs Installation Check List

WinRecs Installation Check List

Server Configuration

Server Name:

Server IP:

Total Memory:

Disk Space:

Software Configuration

Operating System:

SQL Version:

Crystal Reports ❑ Version:

Database

Server Name:

sa password:

SQL Software/Version:

Recovery Mode:

Data Path/File:

Memory Allocated:

Log Path/File:

Total space available on disk/SAN volume:

WinRecs

WinRecs Version:

CD-Key:

WinRecs Installation Folder:

Shared Reports folder(s):

HL7 ❑ Version: TCP Port:

Batch-In ❑ Version:

Batch-Out ❑ Version:

Notes

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Appendix 2 End User License Agreement

(For ISV Royalty Program Only)

Microsoft® SQL Server™ 2008 Standard Edition, _____[1]

Server Licenses: **1**[2]

User Client Access Licenses: **15**[3]

Device Client Access Licenses: **0**[4]

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[1] **LICENSOR: For "Academic Edition" licensed software, please specify the name. For example: Microsoft® SQL Server™ 2008, Standard Edition, Academic Edition.**

[2] **LICENSOR: Specify the total number of server licenses for which the end user is licensed under this agreement.**

[3] **LICENSOR: Specify the total number of user CALs that may access directly or indirectly instances of the server software licensed under this agreement.**

[4] **LICENSOR: Specify the total number of device CALs that may access directly or indirectly instances of the server software licensed under this agreement.**

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IF YOU COMPLY WITH THESE LICENSE TERMS, YOU HAVE THE RIGHTS BELOW FOR EACH SOFTWARE LICENSE YOU ACQUIRE.

OVERVIEW.

Software. **The software includes**

server software; and

additional software that may only be used with the server software directly, or indirectly through other additional software.

License Model. **The software is licensed based on**

the number of instances of server software that you run; and

the number of devices and users that access instances of server software.

Licensing Terminology.

Instance. You create an "instance" of software by executing the software's setup or install procedure. You also create an instance of software by duplicating an existing instance. References to software in this agreement include "instances" of the software.

Run an Instance. You "run an instance" of software by loading it into memory and executing one or more of its instructions. Once running, an instance is considered to be running (whether or not its instructions continue to execute) until it is removed from memory.

Operating System Environment. An "operating system environment" is

all or part of an operating system instance, or all or part of a virtual (or otherwise emulated) operating system instance which enables separate machine identity (primary computer name or similar unique identifier) or separate administrative rights, and

instances of applications, if any, configured to run on the operating system instance or parts identified above.

There are two types of operating system environments, physical and virtual. A physical operating system environment is configured to run directly on a physical hardware system. The operating system instance used to run hardware virtualization software (e.g. Microsoft Virtual Server or similar technologies) or to provide hardware virtualization services (e.g. Microsoft virtualization technology or similar technologies) is considered part of the physical operating system environment. A virtual operating system environment is configured to run on a virtual (or otherwise emulated) hardware system. A physical hardware system can have either or both of the following:

one physical operating system environment

one or more virtual operating system environments.

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Server. A "server" is a physical hardware system capable of running server software. A hardware partition or blade is considered to be a separate physical hardware system.

Assigning a License. To "assign a license" means simply to designate that license to one device or user.

USE RIGHTS.

Assigning the License to the Server.

Before you run any instance of the server software under a software license, you must assign that license to one of your servers. That server is the licensed server for that particular license. You may assign other software licenses to the same server, but you may not assign the same license to more than one server. A hardware partition or blade is considered to be a separate server.

You may reassign a software license, but not within 90 days of the last assignment. You may reassign a software license sooner if you retire the licensed server due to permanent hardware failure. If you reassign a license, the server to which you reassign the license becomes the new licensed server for that license.

Running Instances of the Server Software. **You may run any number of instances of the server software in one physical or virtual operating system environment on the licensed server at a time.**

Running Instances of the Additional Software. **You may run or otherwise use any number of instances of additional software listed below in physical or virtual operating system environments on any number of devices solely to support your use of the integrated software turnkey application or suite of applications (the "Unified Solution") delivered by or on behalf of the Licensor. You may use additional software only with the server software directly or indirectly through other additional software.**

Business Intelligence Development Studio

Client Tools Backward Compatibility

Client Tools Connectivity

Client Tools Software Development Kit

Management Studio

Microsoft Sync Framework

SQL Server 2008 Books Online

Creating and Storing Instances on Your Servers or Storage Media. **You have the additional rights below for each software license you acquire.**

You may create any number of instances of the server software and additional software.

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You may store instances of the server software and additional software on any of your servers or storage media.

You may create and store instances of the server software and additional software solely to exercise your right to run instances of the server software under any of your software licenses as described (e.g., you may not distribute instances to third parties).

Included Microsoft Programs. **The software contains other Microsoft programs. The license terms with those programs apply to your use of them.**

ADDITIONAL LICENSING REQUIREMENTS AND/OR USE RIGHTS.

Client Access Licenses (CALs).

You must acquire and assign a SQL Server 2008 CAL to each device or user that accesses your instances of the server software directly or indirectly. A hardware partition or blade is considered to be a separate device.

You may not access instances of the server software under Workgroup Edition CALs.

You may use your Windows Small Business Server ("SBS") 2008 CAL Suite for Premium Users or Devices instead of SQL Server 2008 CALs to access your instances of the server software within an SBS 2008 domain.

You may use your Windows Essential Business Server ("EBS") 2008 CAL Suite for Premium Users or Devices instead of SQL Server 2008 CALs to access your instances of the server software within an EBS domain.

You do not need CALs for any of your servers licensed to run instances of the server software.

You do not need CALs for up to two devices or users to access your instances of the server software only to administer those instances.

Your CALs permit access to your instances of earlier versions, but not later versions, of the server software. If you are accessing instances of an earlier version, you may also use CALs corresponding to that version.

Types of CALs. **There are two types of CALs: one for devices and one for users. Each device CAL permits one device, used by any user, to access instances of the server software on your licensed servers. Each user CAL permits one user, using any device, to access instances of the server software on your licensed servers. You may use a combination of device and user CALs.**

Reassignment of CALs. **You may**

permanently reassign your device CAL from one device to another, or your user CAL from one user to another; or

temporarily reassign your device CAL to a loaner device while the first device is out of service, or your user CAL to a temporary worker while the user is absent.

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Runtime-Restricted Use Software. **The software is "Runtime-Restricted Use" software; as such, it may only be used in conjunction with the Unified Solution. The software may not be used either (i) to develop any new software applications, (ii) in conjunction with any software applications, databases or tables other than those contained in the unified solution, and/or (iii) as a standalone software application. The foregoing provision, however, does not prohibit you from using a tool to run queries or reports from existing tables. A CAL permits you to access instances of only the Runtime-Restricted User version of the server software licensed and delivered to you as part of the Unified Solution, in accordance with the other terms of the agreement.**

Maximum Instances**. The software or your hardware may limit the number of instances of the server software that can run in physical or virtual operating system environments on the server.**

Multiplexing. **Hardware or software you use to**

pool connections,

reroute information, and

reduce the number of devices or users that directly access or use the software, or

reduce the number of devices or users the software directly manages.

(sometimes referred to as "multiplexing" or "pooling"), does not reduce the number of licenses of any type that you need.

No Separation of Server Software. **You may not separate the server software for use in more than one operating system environment under a single license, unless expressly permitted. This applies even if the operating system environments are on the same physical hardware system.**

Fail-over Server. **For any operating system environment in which you run instances of the server software, you may run up to the same number of passive fail-over instances in a separate operating system environment for temporary support. You may run the passive fail-over instances on a server other than the licensed server**.

INTERNET-BASED SERVICES. **Microsoft provides Internet-based services with the software. It may change or cancel them at any time.**

.NET FRAMEWORK AND POWERSHELL SOFTWARE. **The software contains Microsoft .NET Framework and PowerShell software. These software components are part of Windows.**

BENCHMARK TESTING. **You must obtain Microsoft's prior written approval to disclose to a third party the results of any benchmark test of the software. However, this does not apply to the Windows components. For Microsoft .NET Framework see below.**

MICROSOFT .NET FRAMEWORK. **The software includes one or more components of the .NET Framework (".NET Components"). You may conduct internal benchmark testing of**

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DOCUMENTATION. **Any person that has valid access to your computer or internal network may copy and use the documentation for your internal, reference purposes.**

NOT FOR RESALE SOFTWARE. **You may not sell software marked as "NFR" or "Not for Resale."**

ACADEMIC EDITION SOFTWARE. **You must be a "Qualified Educational User" to use software marked as "Academic Edition" or "AE." If you do not know whether you are a Qualified Educational User, visit www.microsoft.com/education or contact the Microsoft affiliate serving your country.**

TRANSFER TO ANOTHER DEVICE. **You may uninstall the software and install it on another device for your use solely as part of the Unified Solution. You may not do so to share this license between devices to reduce the number of licenses you need.**

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