MED2020
Health Care Software Inc.

2019

WinRecs 3 Technical Guide

MED2020 Health Care Software Inc.

MED2020 Health Software Inc. (MED2020) is the leading provider of modular health information management solutions for the Canadian 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.

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In this document, ***SQL Server*** refers to ***Microsoft® SQL Server 2012***

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About This Document

The information contained in this document focuses on the installation and maintenance of the MED2020 WinRecs 3 application or newer.

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 Microsoft® 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 blue text with light gray background.

1 Introduction

READ THIS SECTION BEFORE INSTALLING ANY SOFTWARE

This document was written for a moderately technical audience. It is assumed throughout the document 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 a standard support contract unless your facility has agreed to additional support options.

The information contained in this document is provided to assist with the installation of WinRecs suite and *Microsoft® SQL Server* through WinRecs. This installation assumes that the Microsoft® SQL Server 2008 R2™ 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 to work with WinRecs.

Management Studio is installed when installing Microsoft® SQL Server. 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 Reports is also installed as an integrated part of the WinRecs application.

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.

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.

2 Before You Begin…

Prior to beginning installation of WinRecs, please ensure that you have everything you need to complete the installation.

- Prior to installing any software, ensure that you have made backup copies of your sensitive data, and you have your backups readily available.
- You know the exact path to your databases.
- You read all the important notes and hints distinguished by light gray background.

Note:	MED2020 will not be held responsible for data loss, nor can MED2020 assist with data backup and recovery. Instructions for backup and recovery are found later in this document.

3 Database Management and Server Maintenance

3.1 Starting and Stopping SQL Server

The SQL server can be started or stopped in 3 different ways:

1. From Server Management Studio
2. From services in Administrative Tool
3. From the command prompt:

   net stop MSSQLSERVER

   net start MSSQLSERVER

Note:	Do not stop the service while client workstations or HL7 interface applications are running.

3.2 Shutting Down the WinRecs Server

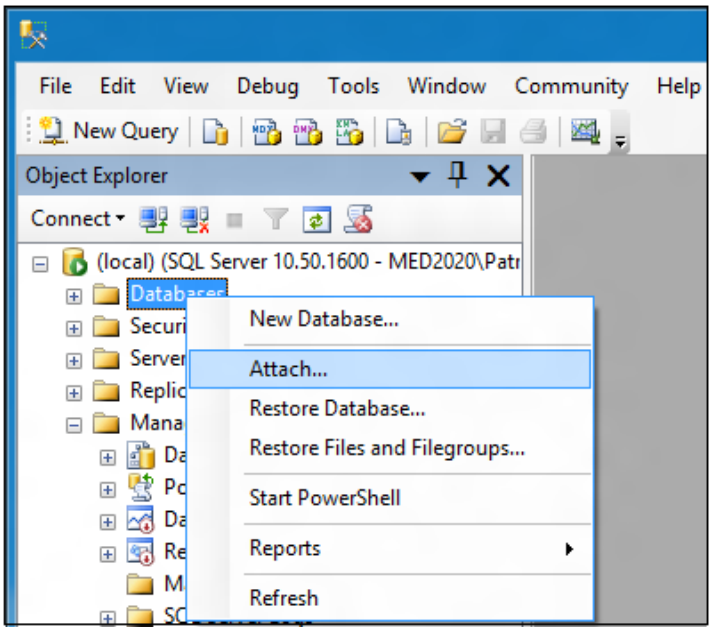
It is recommended that the following steps be performed to successfully shutdown the WinRecs server:

- Advise all WinRecs client users to disconnect and discontinue use of the WinRecs system until the maintenance is complete
- It is now safe to shut down the WinRecs Server, or perform other system maintenance tasks.

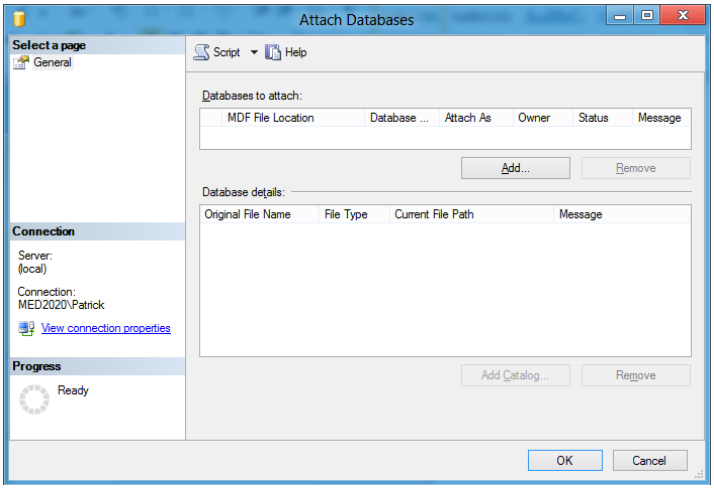
Note:	All users in your facility must be logged off WinRecs when these steps are performed. Otherwise, data may be lost.

Before proceeding with the following instructions, ensure that the WinRecs database files are available and have been extracted and copied to their permanent folder on the server. Once a database has been attached, it cannot be moved until the database is detached at which time the system will be unavailable.

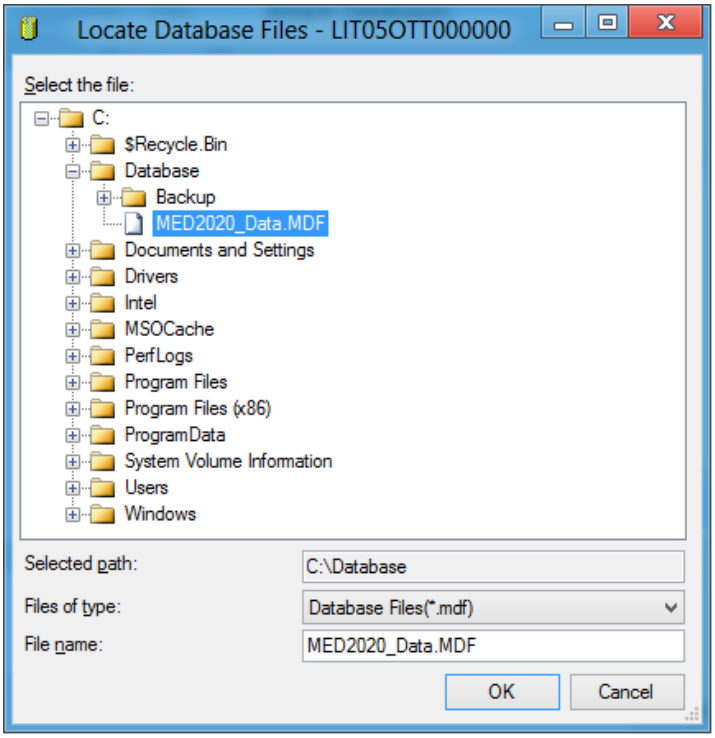
3.3 Attaching the WinRecs Database



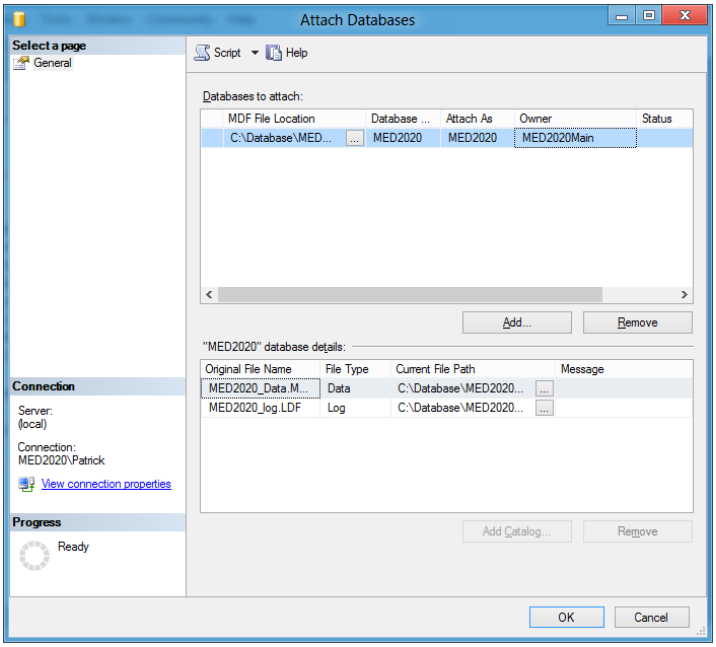
Right click on *Database* and select *Attach.*



Click *Add* to select database



Select the mdf and click *OK*



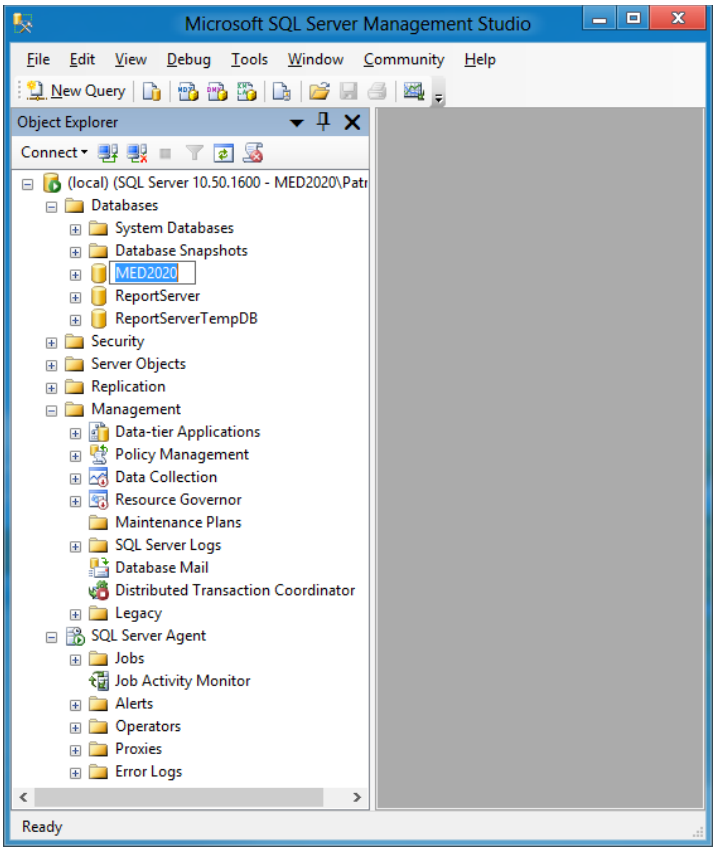
The database and log files are now displayed.

The database owner must be set to MED2020Main

If you wish to change the database name, you will need to change the text in the field *Attach As*.

Click the *OK* button to accept the settings; you will be notified of an error if attaching the database was unsuccessful

Note: The location of the transaction log is determined by the properties of the mdf file. For more information on storing the transaction log on a different drive, consult section 5.2 (Moving the transaction log to a different drive)



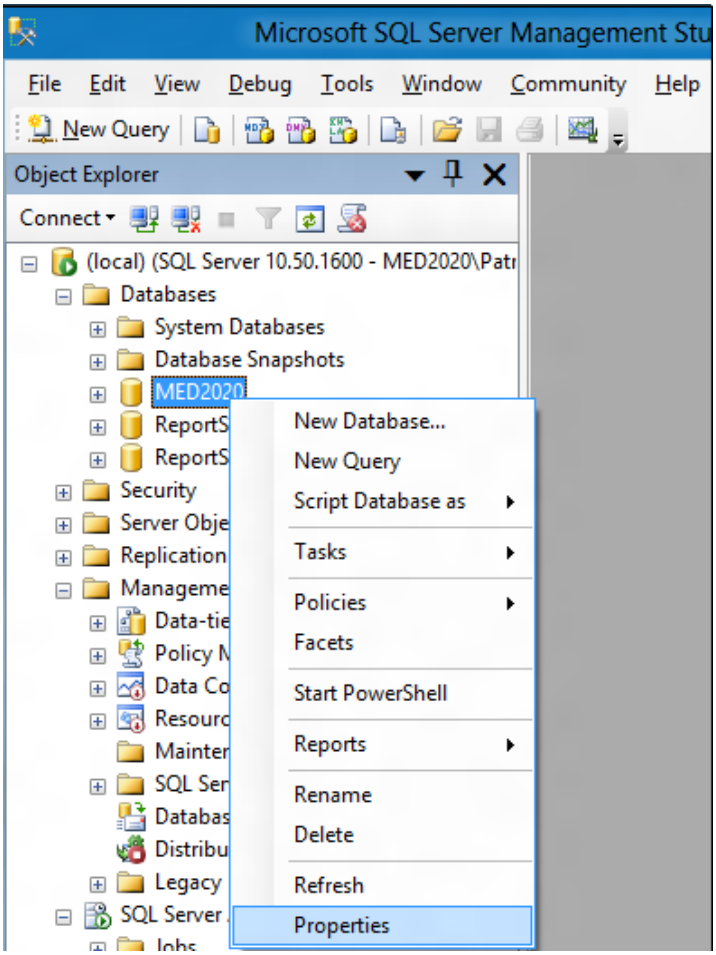
Once the database has been successfully attached, it is displayed in the tree view under *Databases*

3.4 Detaching the WinRecs Database

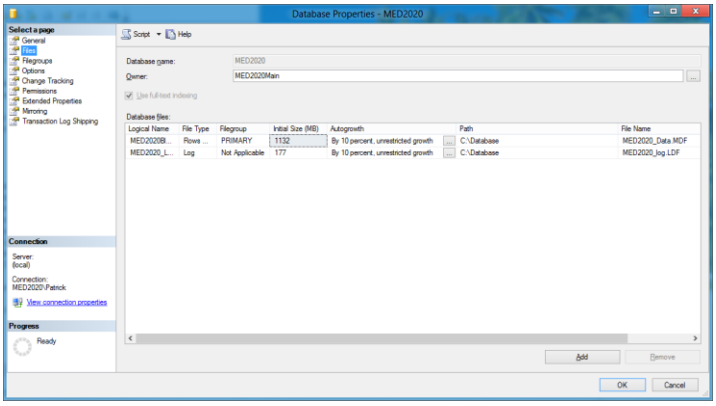
The following steps are used to successfully detach the WinRecs database.

Note: All WinRecs users in your facility must not be using the WinRecs application when these steps are performed. Otherwise, data might be lost.

Before detaching the database, verify the location of the data file that will be used in the post-detach activities:

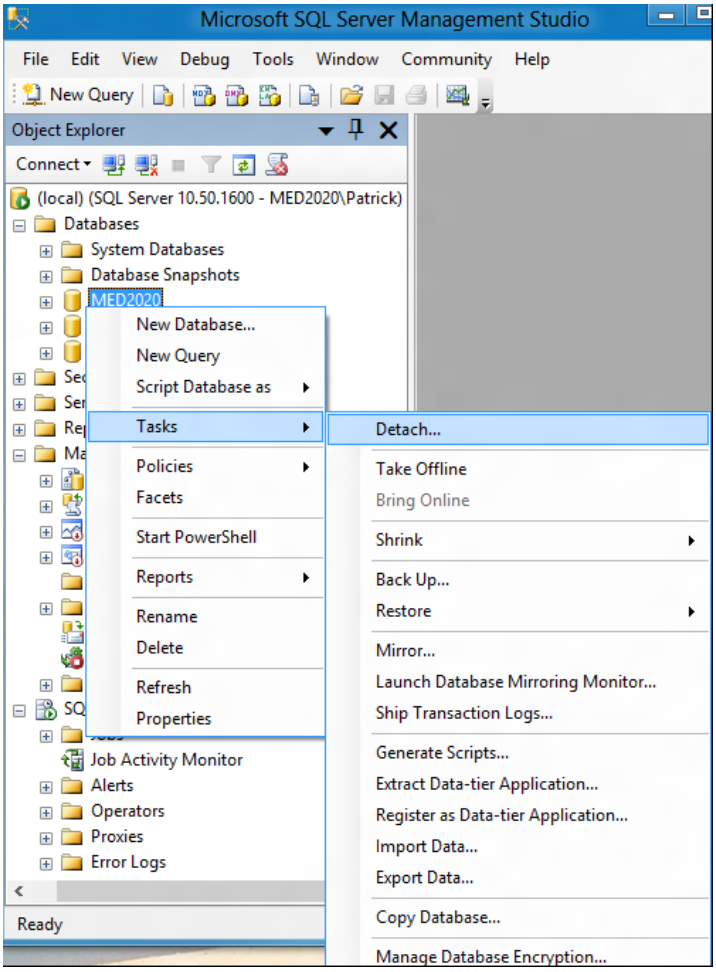


Right-click on the database and select *Properties*

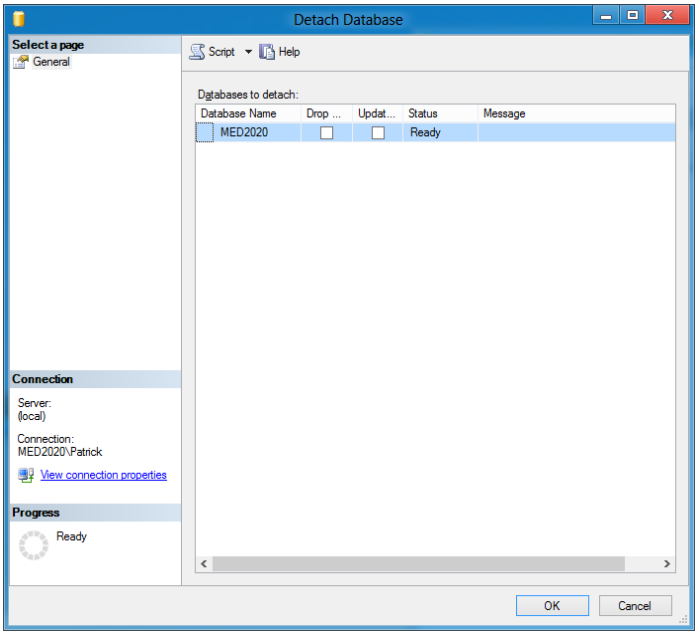


Click the *Files* tab

Once the path is verified click *Cancel* to proceed with detaching the database

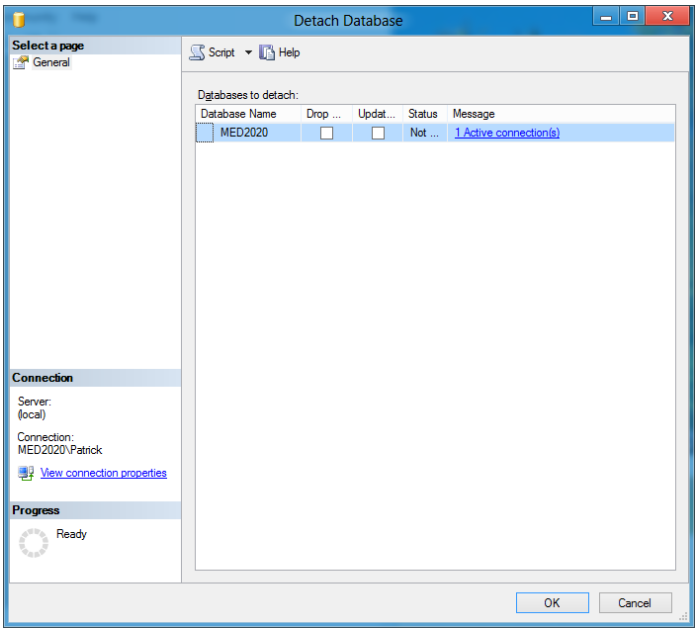


Right click on the database and select *Tasks->Detach.*



Click *OK* to detach the database. The WinRecs database has been detached and is no longer displayed in the tree view.

If SQL reports active connections but no one is logged in to WinRecs, please perform the following steps:



- Check off Drop Connections.
- Then click OK to detach the database.

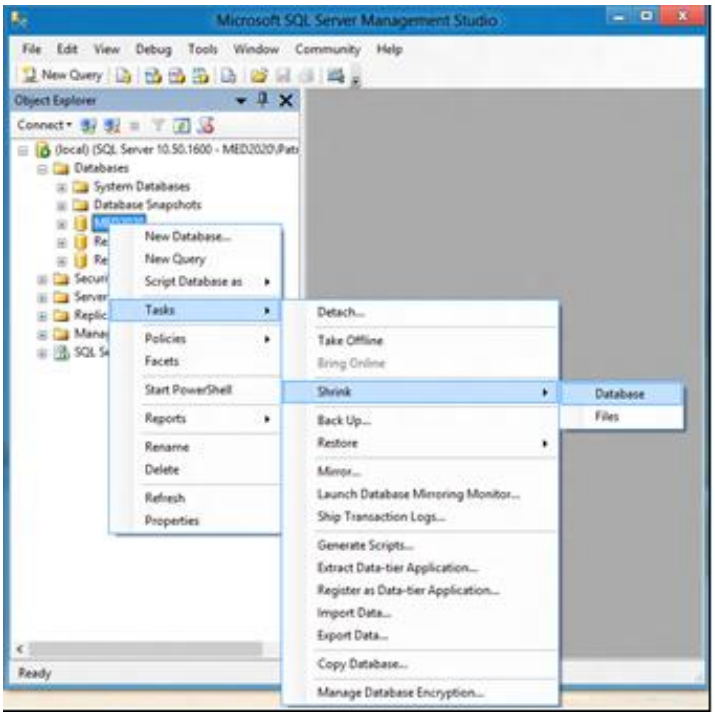
The WinRecs database has been detached and is no longer displayed in the tree view.

4 Advanced Database Management and Server Maintenance

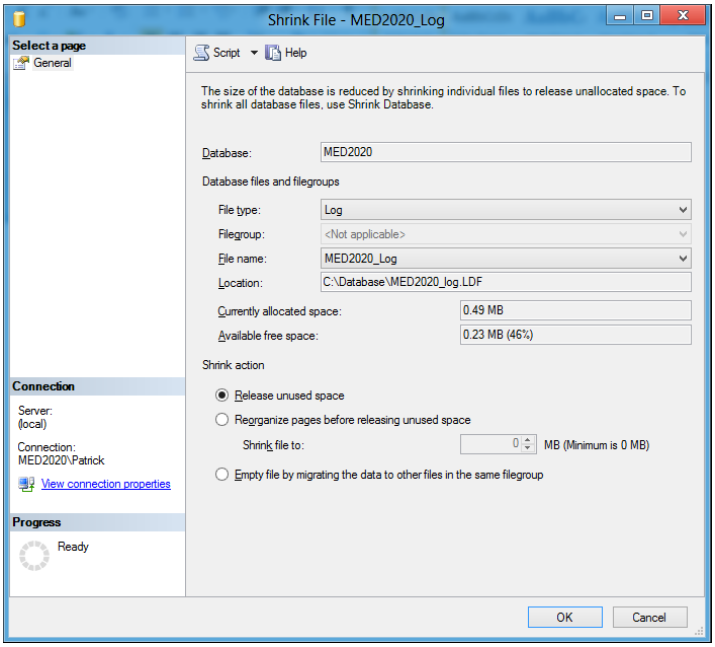
The following sections detail steps that may assist when the WinRecs database disk space is low.

4.1 Shrinking the Log File

From within SQL Server Management Studio, expand the following sections in the tree view to reveal the WinRecs database in the list:



- Navigate to the WinRecs database
- Right-click on the database and select Tasks->Shrink-> Files



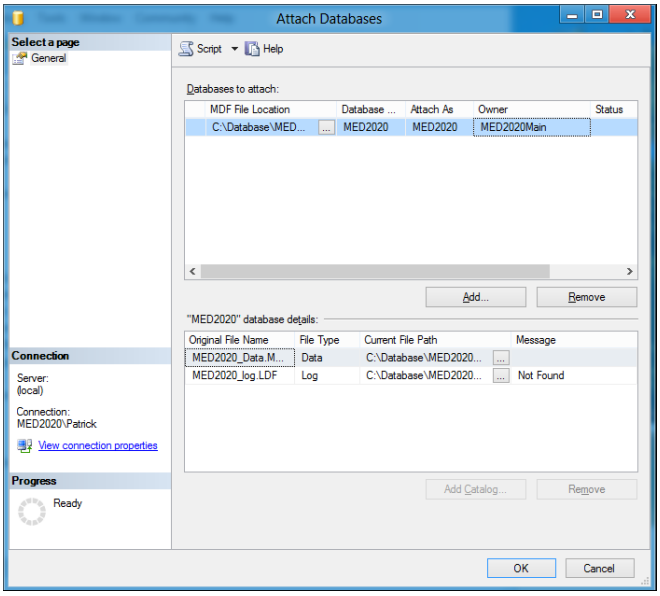
- Under Database files and filegroups, in the file type drop-down list, select the Log
- Under Shrink action, select Release unused space, click OK

4.2 Moving the Transaction Log to a Different Drive

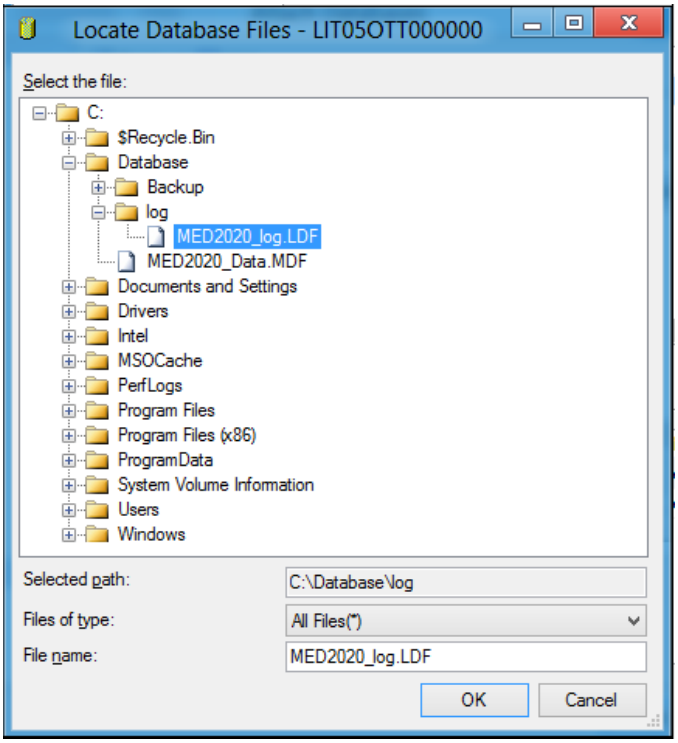
The size and growth of the Transaction Log can often impede the availability and performance of the WinRecs database. When this occurs, we recommended that you move the Transaction Log to a different physical location, using the following steps:

- Identify the location and physical file name of the Transaction Log
- Detach the database (see section 4.4)
- Relocate the Transaction Log (LDF) file to the new location
- Attach the database file as previously instructed (section 4.3)
- In SQL Server Management Studio, re-attach the database

The Attach Database window will indicate that the log file cannot be found.



- Click the ellipsis (…) for the log file



- Select the correct path to the .LDF
- Click *OK*; the *Current File Location* for the transaction log should now be registered correctly.

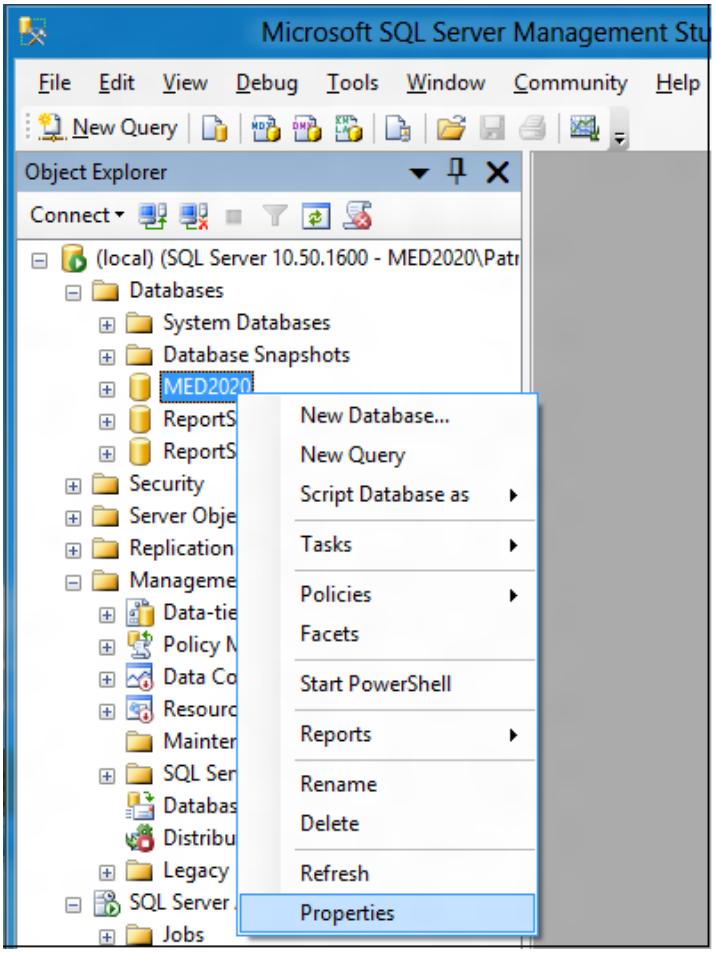
Complete the remaining steps to attach the database as per instructions in section 4.3.

4.3 Setting Recovery Model

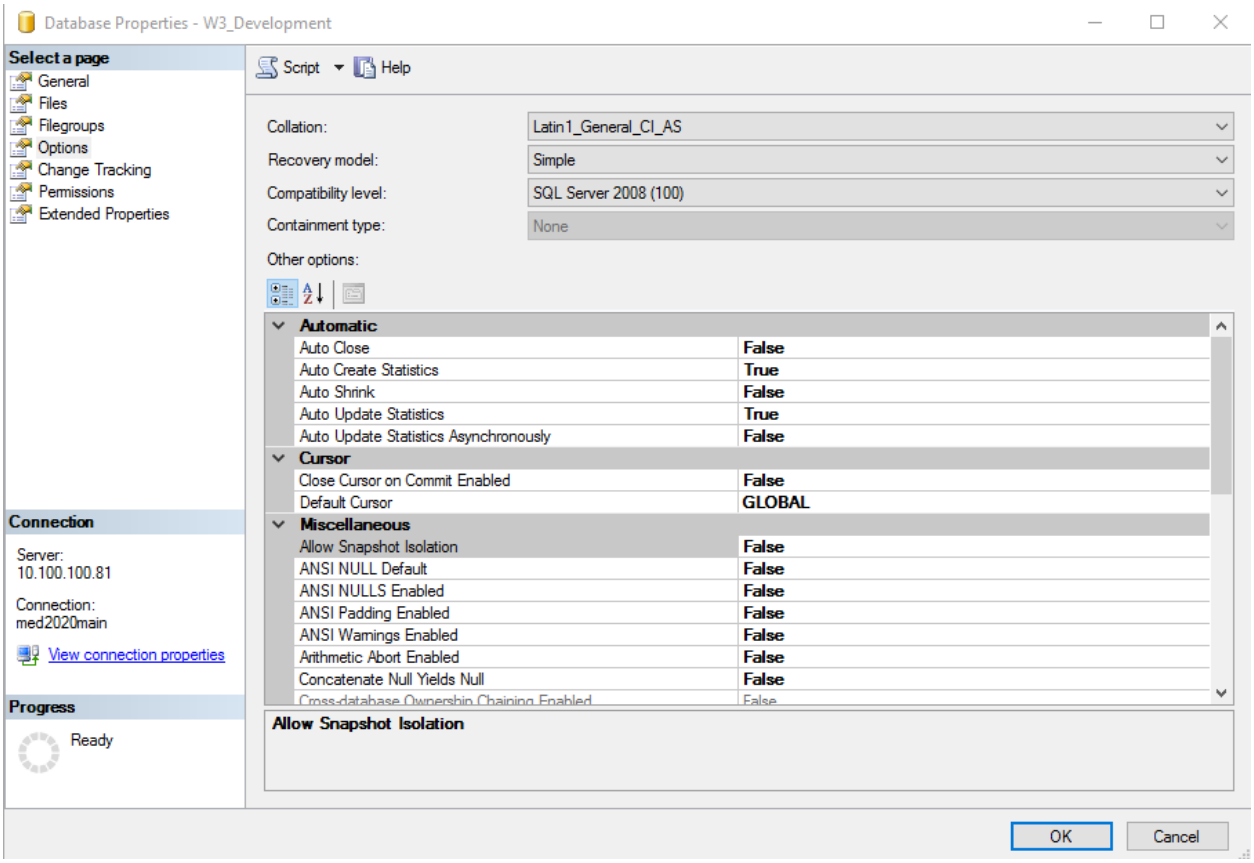
The recovery model determines to what extent databases can be recovered in the event of failure. By default, all SQL databases are configured with a Full Recovery model.

For customers who are consistently running out of disk space and cannot relocate the transaction log to an alternate drive, the recovery model can be changed to *Simple* which will reduce the amount of disk space that the transaction logs will consume.

From within SQL Server Management Studio, expand the following sections in the tree view to reveal the WinRecs database in the list:



- Navigate to the *WinRecs* database
- Right-click on the database and select *Properties*



- Click the *Options* tab
- In the *Recovery*: Model drop-down list, select the recovery model.

The following table can be used to determine the most appropriate method:

Recovery Model Name	Recovery Model Description
Bulk-Logged	The Bulk-Logged recovery model has fewer recovery options than the Full model, but it has a less severe performance impact on bulk operations. It uses less log space on certain bulk operations because it records only the operations' results. With this model, however, you can't restore to a specific mark in the database, nor can you restore just parts of the database.
Full	The FULL recovery model gives you the most recovery flexibility. It's the default recovery option for new databases. This model allows you to restore just part of a database or do a complete recovery. Assuming the transactions logs haven't been damaged, you can also recover up to the last committed transaction prior to a failure. This method uses the most transaction log space of all the recovery models and it causes minimal impact on SQL Server performance.
Simple	The SIMPLE recovery model is the easiest of the three to implement and it uses the least amount of storage space. However, recovery is limited to when the database was last backed up.

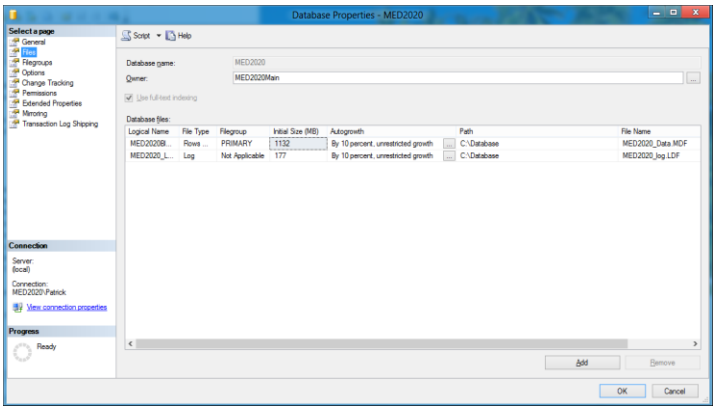
Once the recovery model has been selected, click *OK*.

4.4 Sizing the Database

Properly sizing the database avoids the need for additional overhead associated with growing data files. Limiting the amount of physical database growth will help prevent the fragmentation of data files.

From within SQL Server Management Studio, expand the following sections in the tree view to reveal the WinRecs database in the list:

- Navigate to the WinRecs database
- Right-click on the database and select Properties



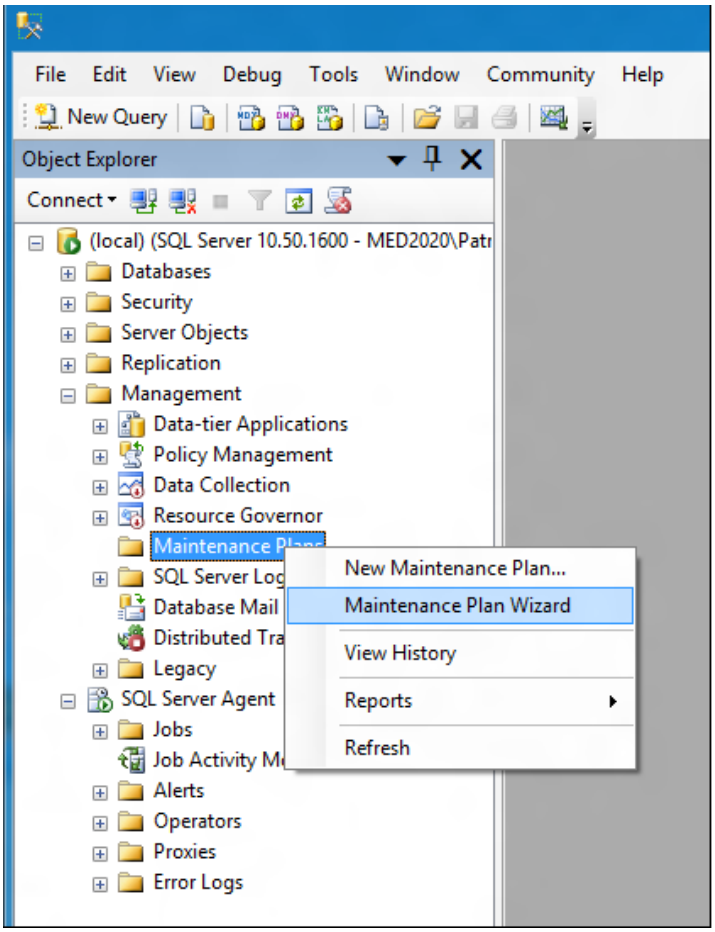
Note: As a baseline, it is recommended to set the data files to 10%, unrestricted growth.

4.5 Backing up the Databases

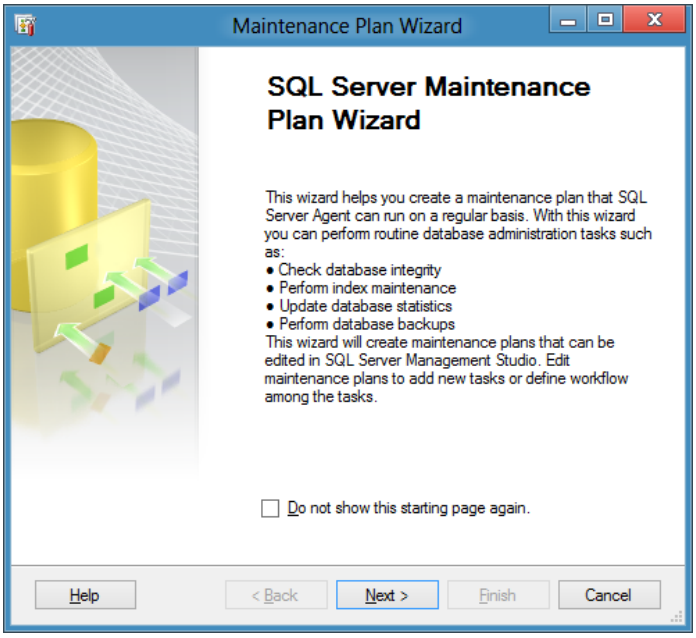
It is recommended to use SQL Server to backup databases as the data files are locked when attached. Only select tools are able to back up open data files. Additionally, SQL Server is faster at creating database backups than other software solutions.

This method also ensures that, in the event of a network backup failure, a local backup is available.

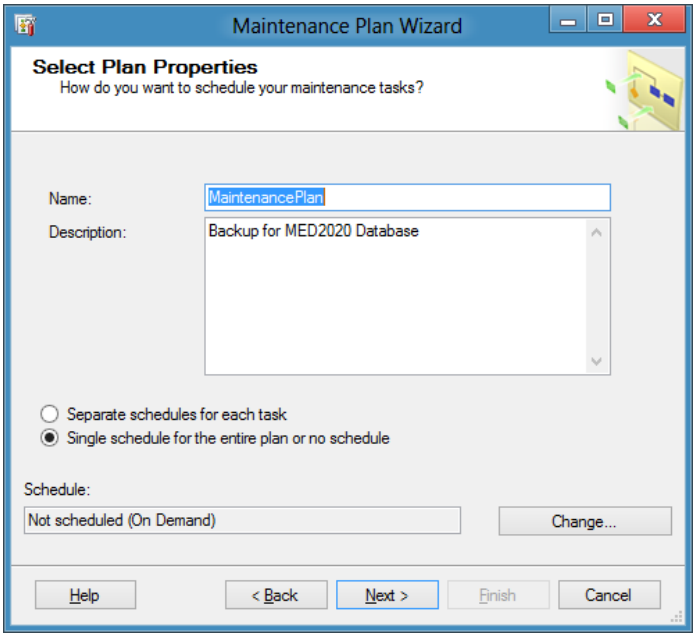
- In SQL Server Management Studio, expand the tree to the Management options



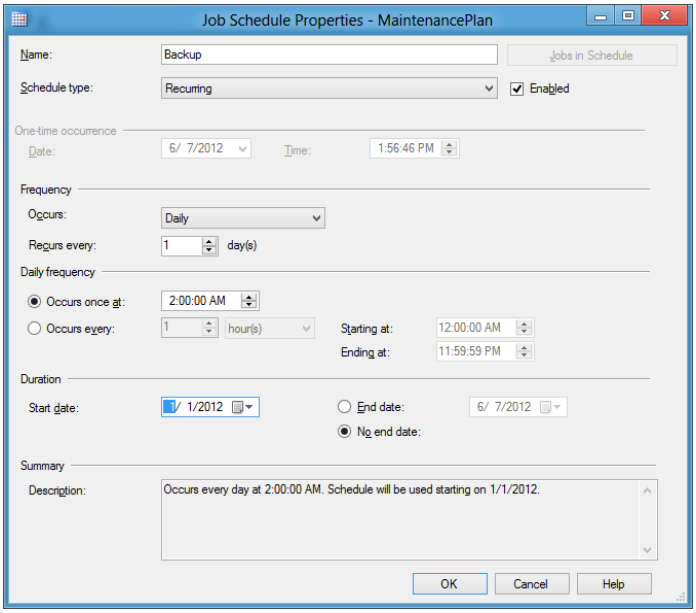
- Navigate to *Management*
- Right-click on *Maintenance Plans* and select *Maintenance Plan Wizard*



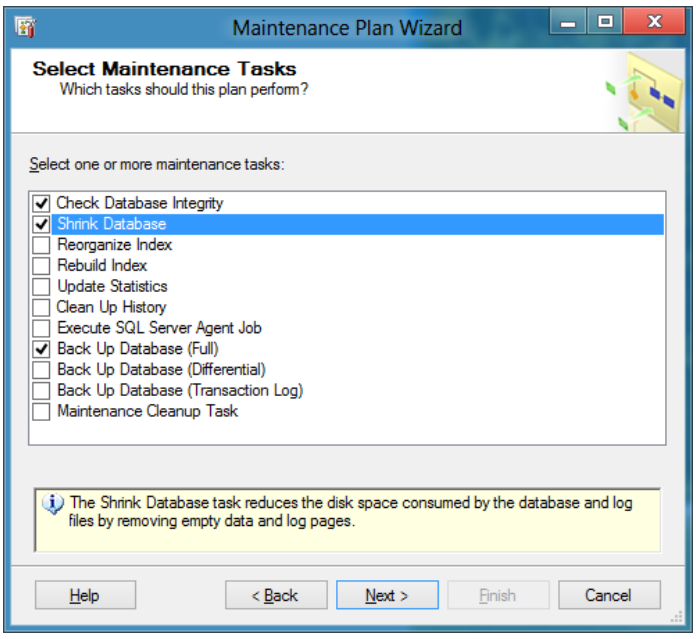
- Click *Next*



- Give the *Maintenance Plan* a name
- Before proceeding, click Change to define a schedule

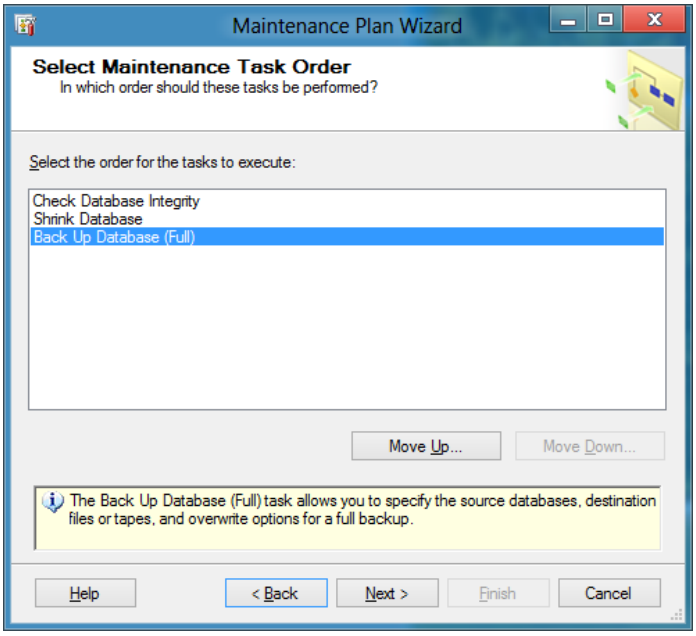


- Enter all the information to define the schedule for the job to run
- Click *OK* to return to the previous screen, then click *Next*



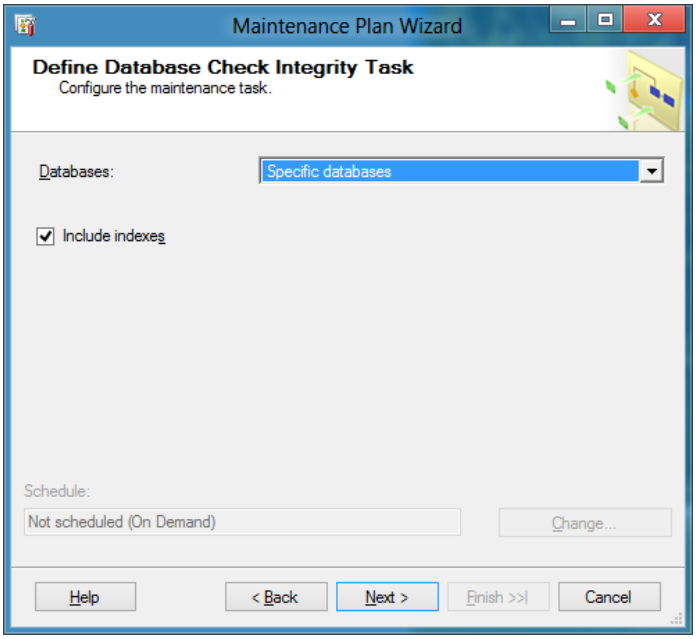
- Place a check mark in *Back Up Database (Full)*

It is recommended to also perform *Check Database Integrity* as well as *Shrink Database*.



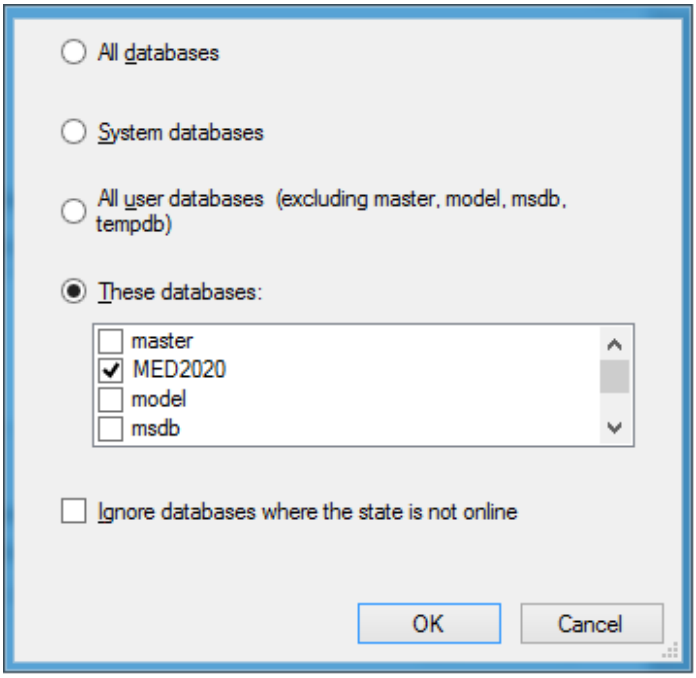
- Select order then click *Next*[1]

Note: The existing order is the recommended one.

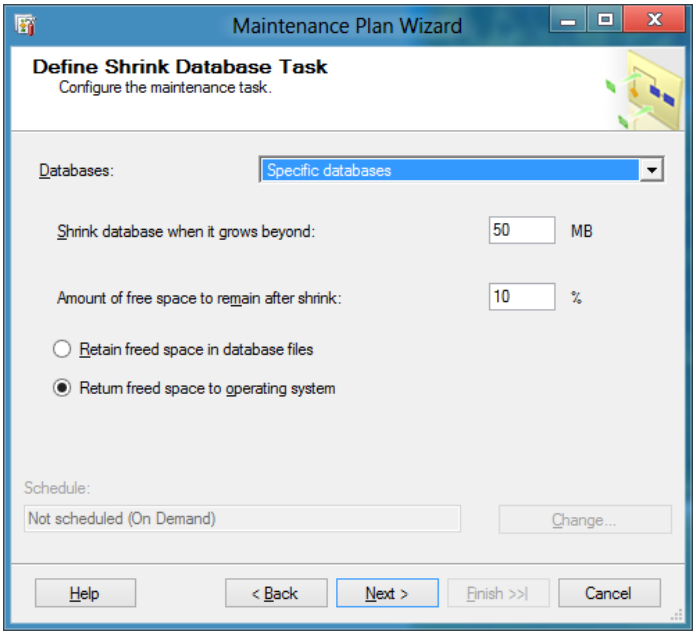


- Click on the *Databases* drop-down

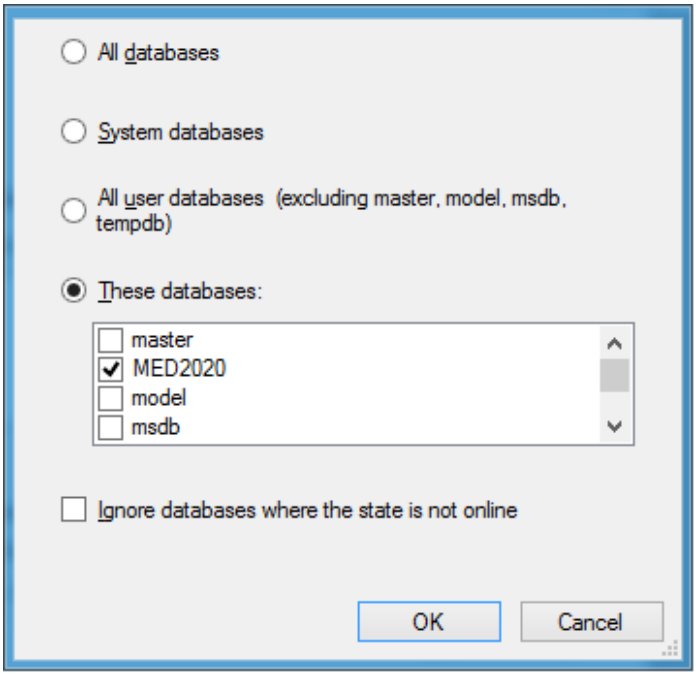
[1] *The existing order is the recommended one*



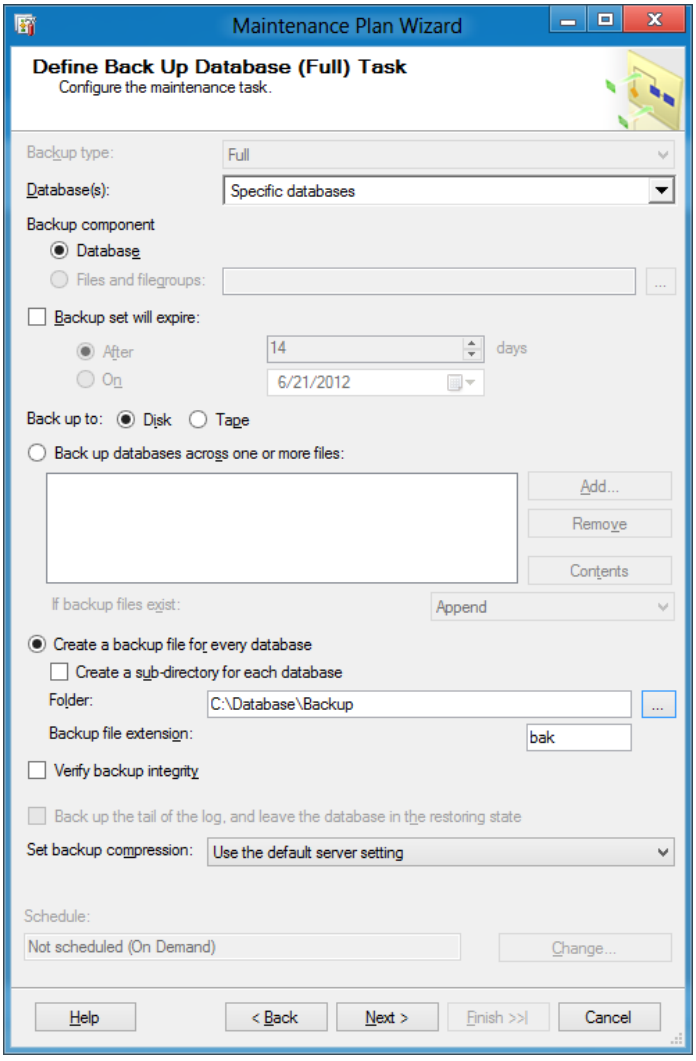
- Select the database(s) and click *OK*
- This will return you to the previous screen, click *Next* to proceed



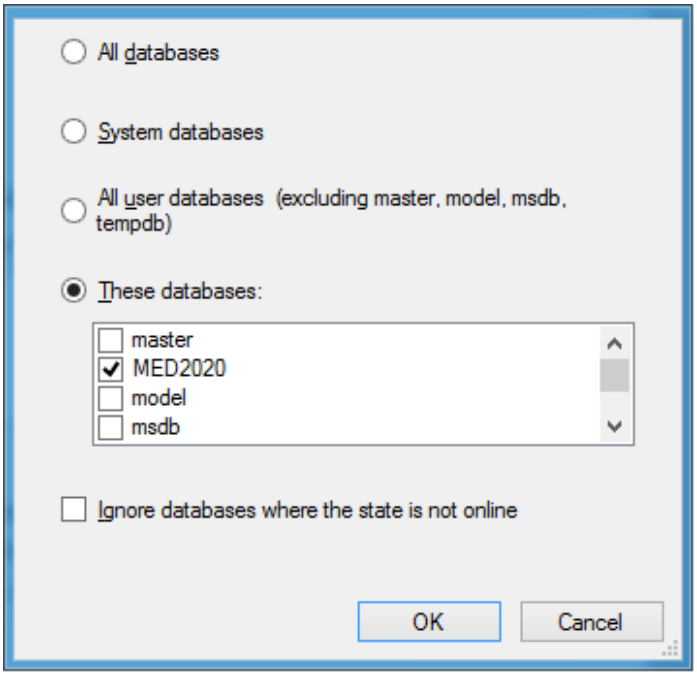
- Click on the *Databases* drop-down



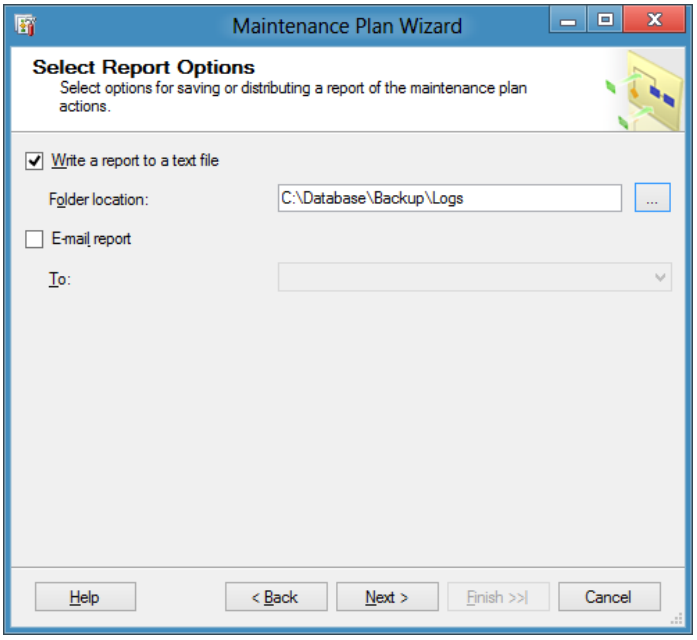
- Select the database(s) and click *OK*; this will return you to the previous screen. Click *Next* to proceed



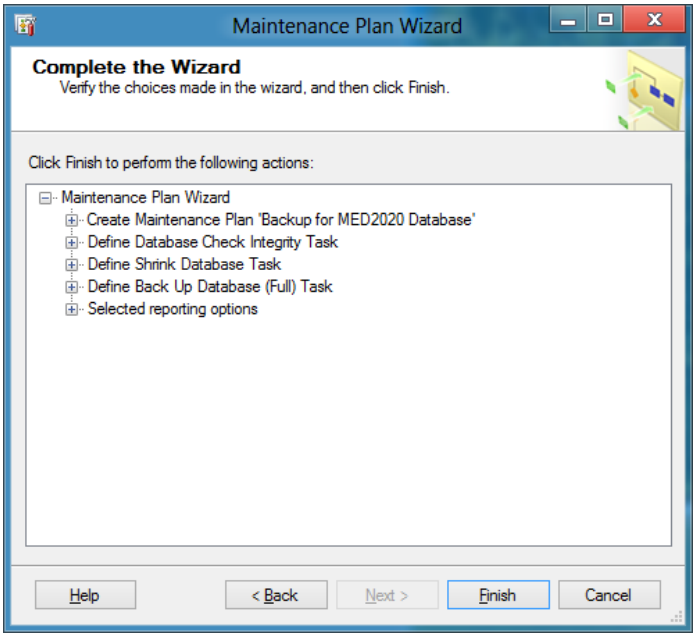
- Select Create a Backup for every database
- For the Folder location, click the ellipsis (…) and browse to the folder in which you wish to store your backups
- Click on the *Database(s)* drop-down



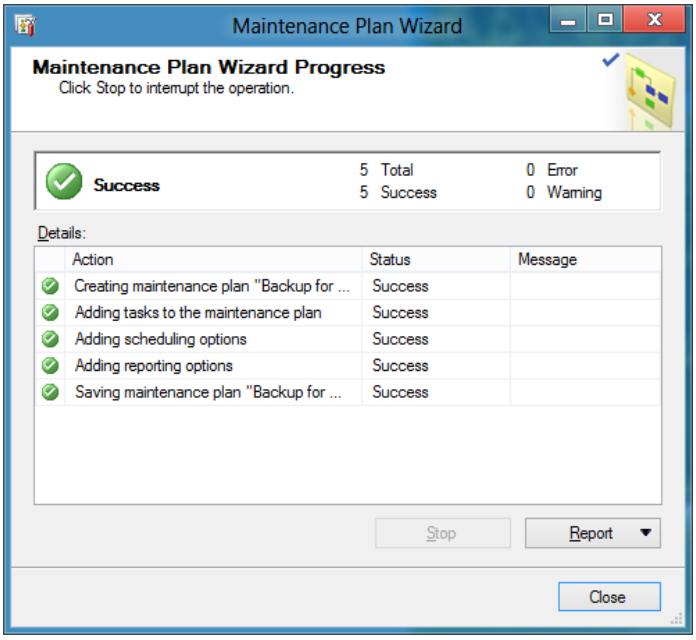
- Select *These databases* and click *OK*; this will return you to the previous screen. Click *Next* to proceed



- For *Folder location*, click the ellipsis (…) and brows to the folder in which you wish to store your backup reports
- Click *Next*



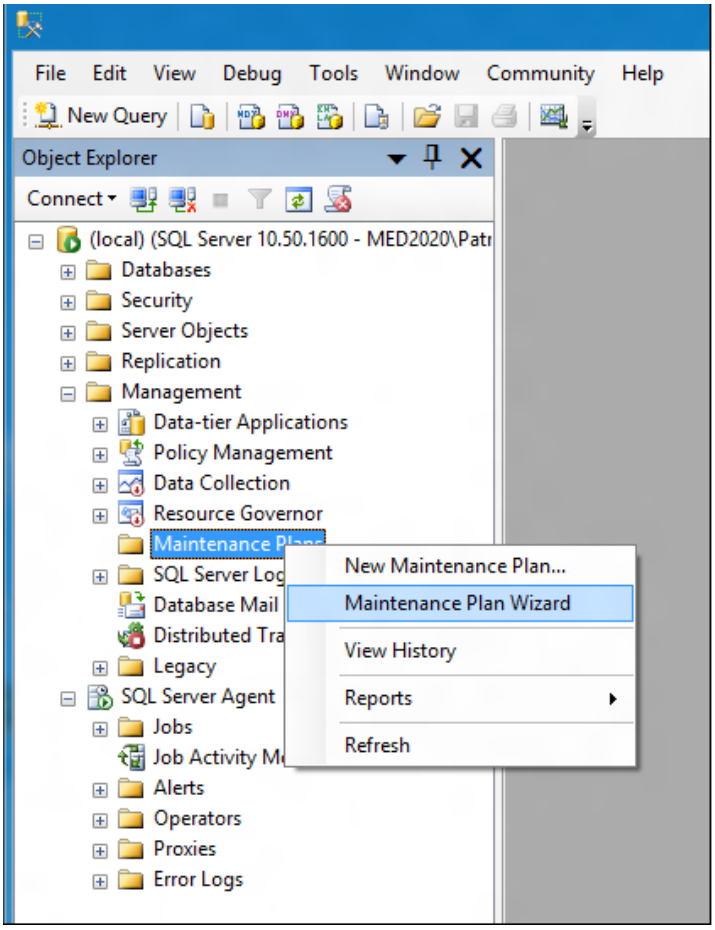
- Click *Finish*



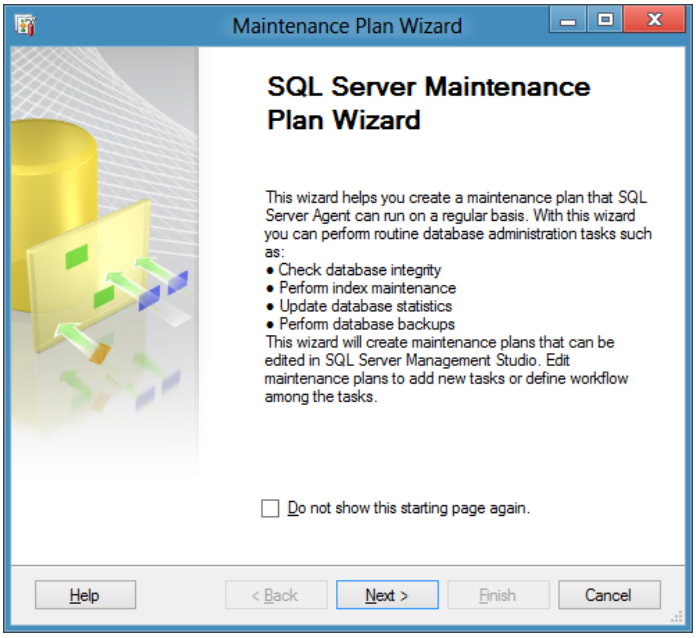
- Click *Close*

Note:	Be sure to verify the maintenance jobs by running them at least once prior to establishing a routine schedule as part of your recovery process.

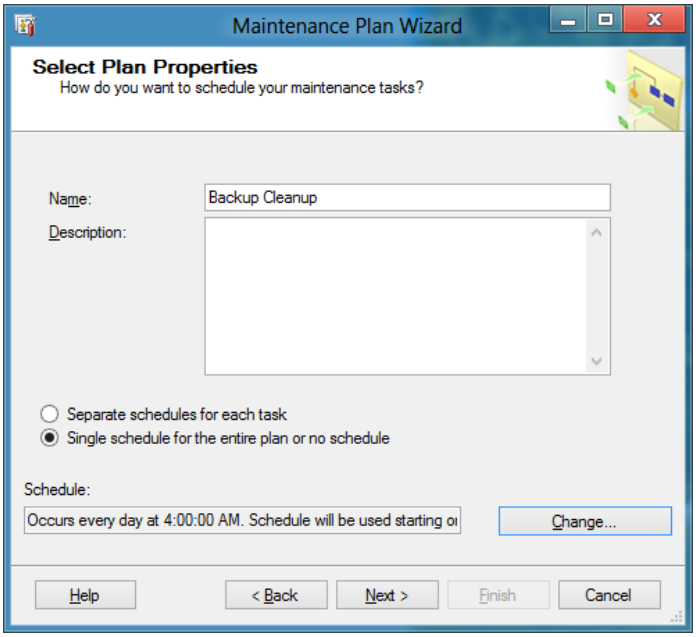
4.6 Backup Databases Cleanup



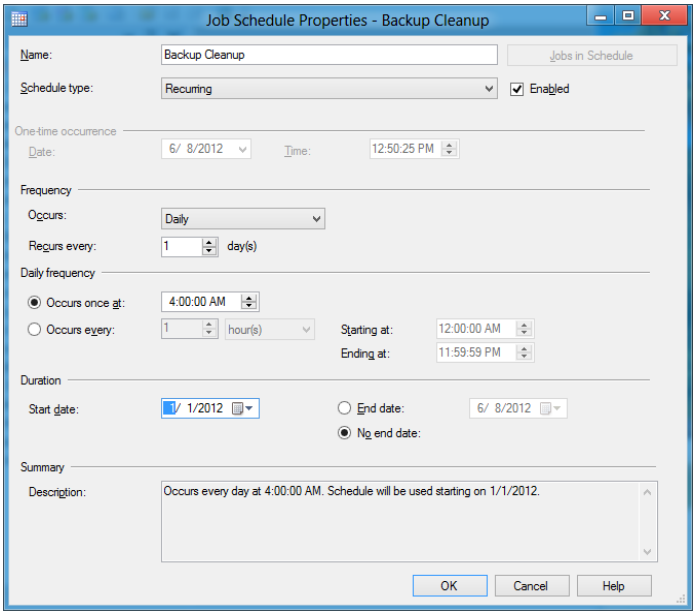
- Navigate to *Management*
- Right-click on *Maintenance Plans* and select *Maintenance Plan Wizard*



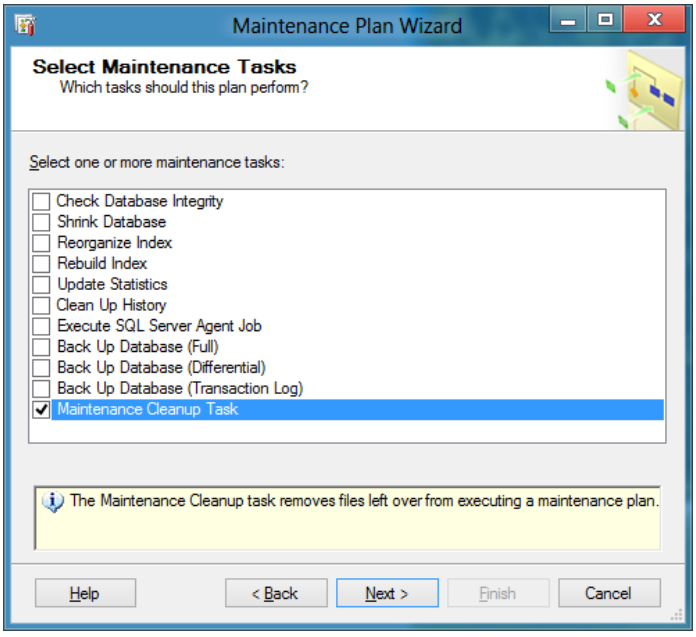
- Click *Next*



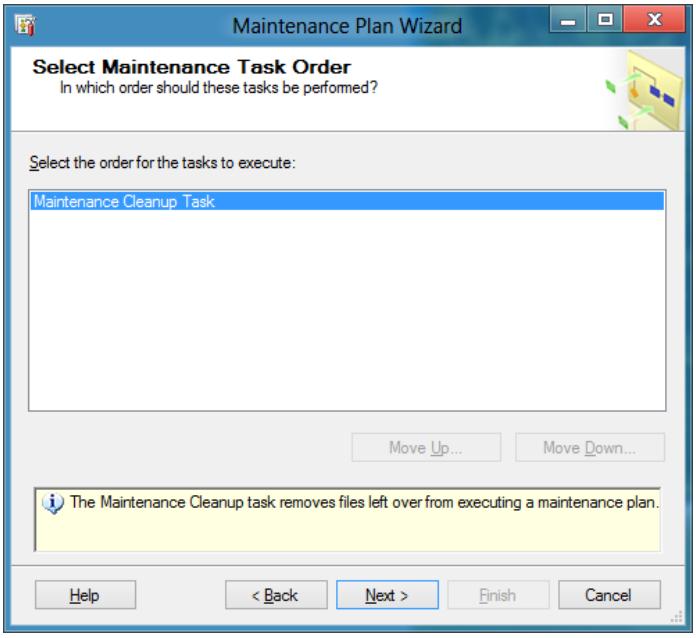
- Give the*Maintenance Plan* a name
- Before proceeding, click *Change* to define a schedule



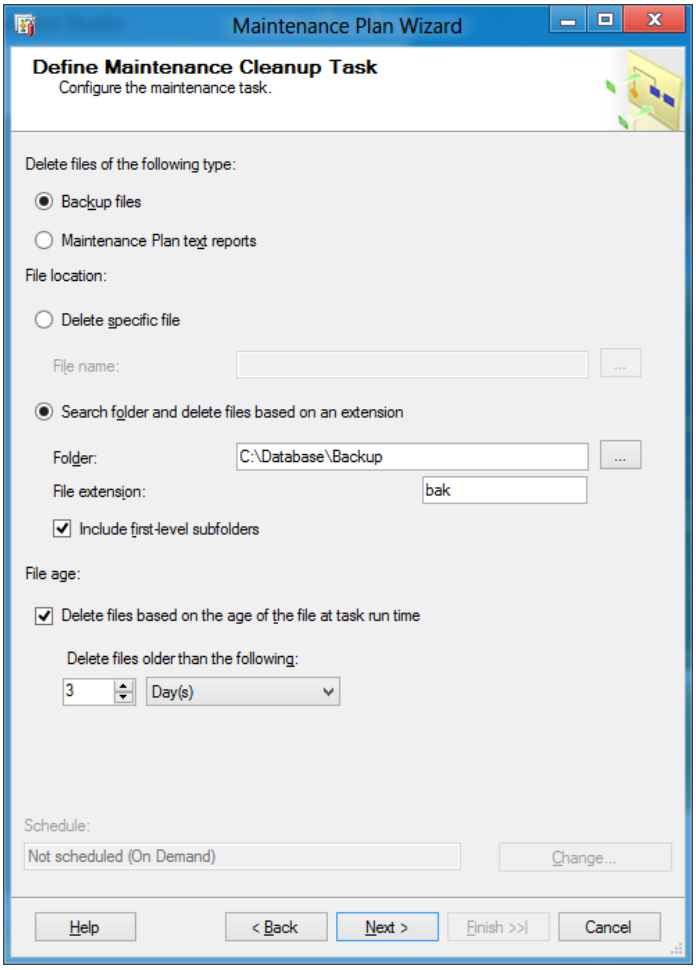
- Enter all the required information to define the schedule for the job to run
- Click *OK* to return to the previous screen
- Then click *Next*



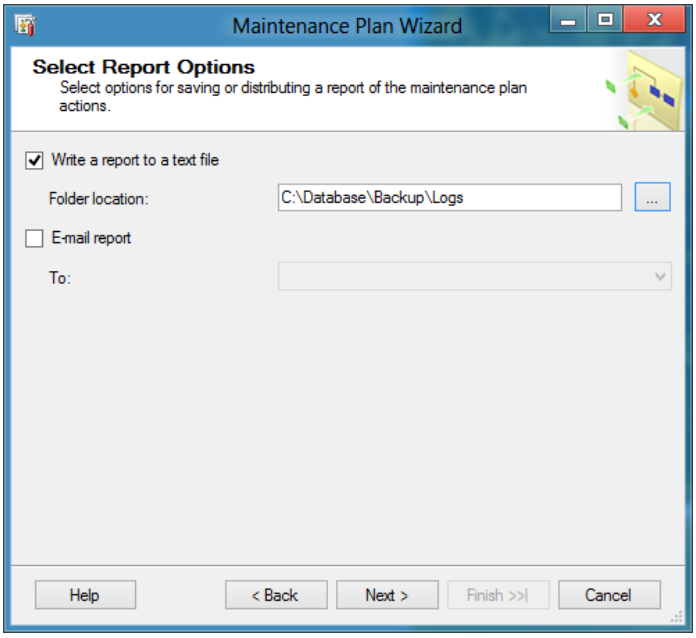
- Place a check mark in *Maintenance Cleanup Task*
- Click *Next*



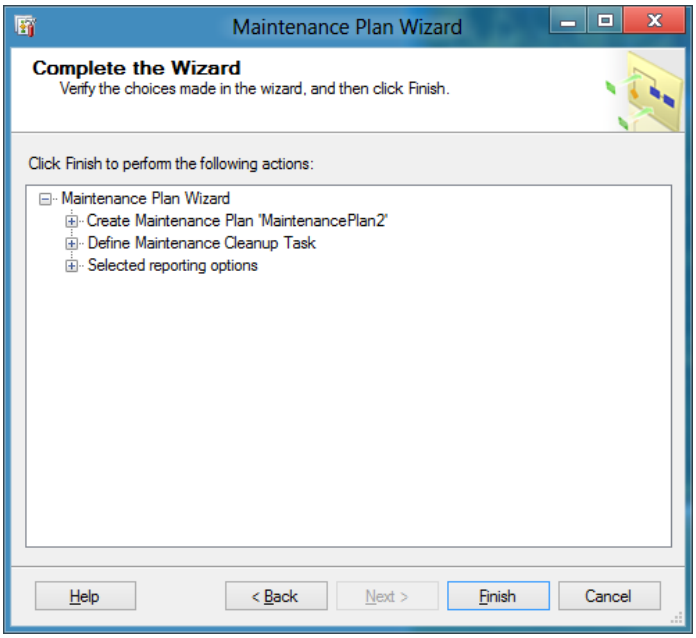
- Click *Next*



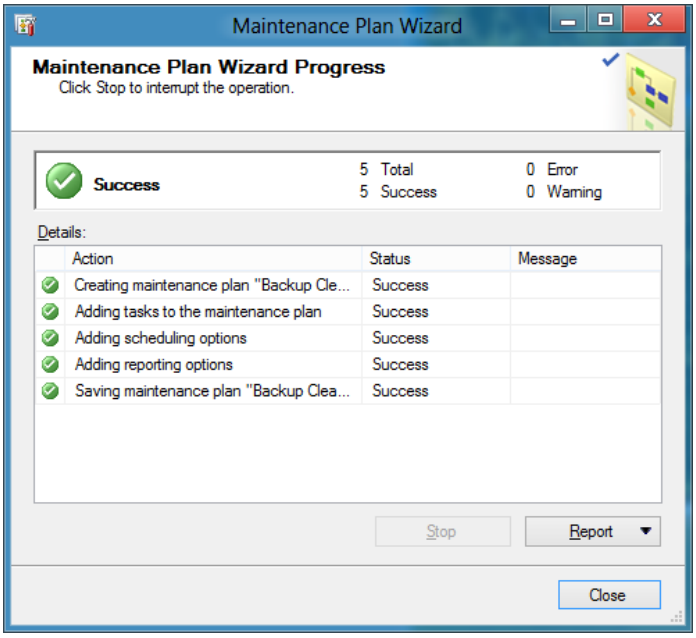
- Under the *Delete files of the following types*, select *Backup Files*
- Select *Search folder and delete files based on extension*
- For *Folder*, click the ellipsis (…) and browse to the folder that contains your backups
- Key in **bak** for *File extension*
- Place a check mark in *Include first-level subfolders*
- Under *File age*, check *Delete files based on the age of the file at task runtime*
- Under *Delete files older than the following,* using arrows select **3**
- Click *Next*



- For *Folder location*, click the ellipsis (…) and browse to the folder in which you wish to store your backup cleanup logs
- Click *Next*



- Click *Finish*



- Click *Close*

4.7 Relocating/Cloning WinRecs to another Server

Prepare the current server by performing the steps in the section entitled Shutting Down WinRecs (see section 4.2). **Do not reboot the server**.

- Detach the WinRecs and/or Batch-In database(s) that will be moved to a new folder, drive or server
- Archive (create a zip file of) the Database (.mdf) and Transaction Log (.ldf) files

Note: Do not change the file names of the Database or Transaction Log files.

- Archive, copy and relocate the "WR2 Reports" folder and/or any shared reports folders used by WinRecs client workstations
- Proceed with the installation of the new server as described in section 4.1
- Un-zip and re-attach the databases using the instructions in section 4.3

4.8 Re-Indexing the Database

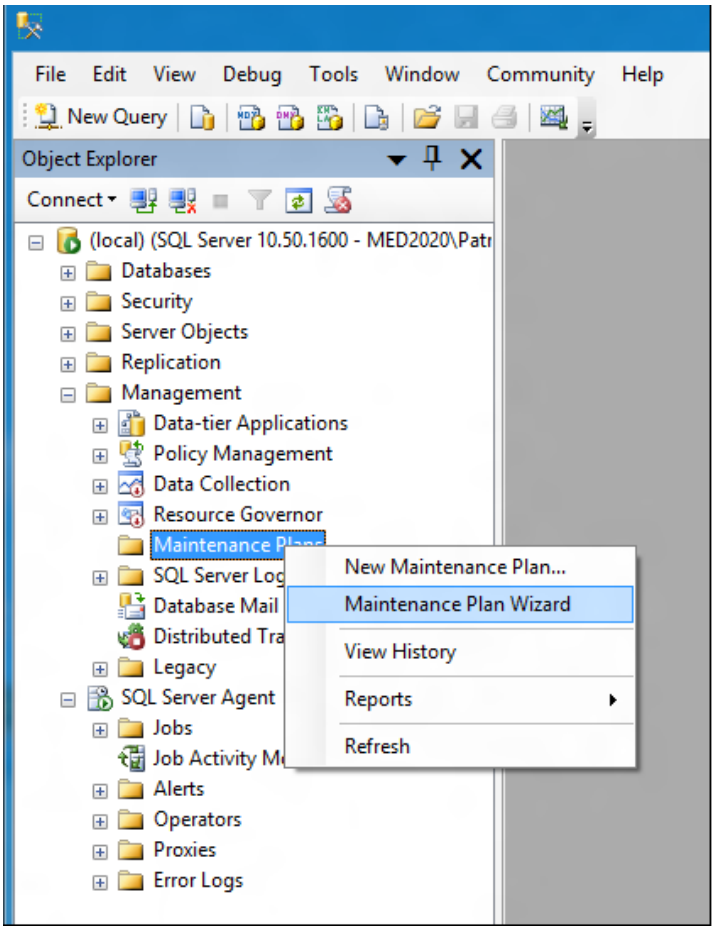
This section provides instruction on how to set up a re-indexing job on your WinRecs client server.

Note: Currently it is not possible to Re-Index a database without SQL Management Studio or Enterprise Manager. For sites still using SQL 2000 MSDE, we recommend that you upgrade to SQL 2008 R2 Express, which properly supports this functionality.

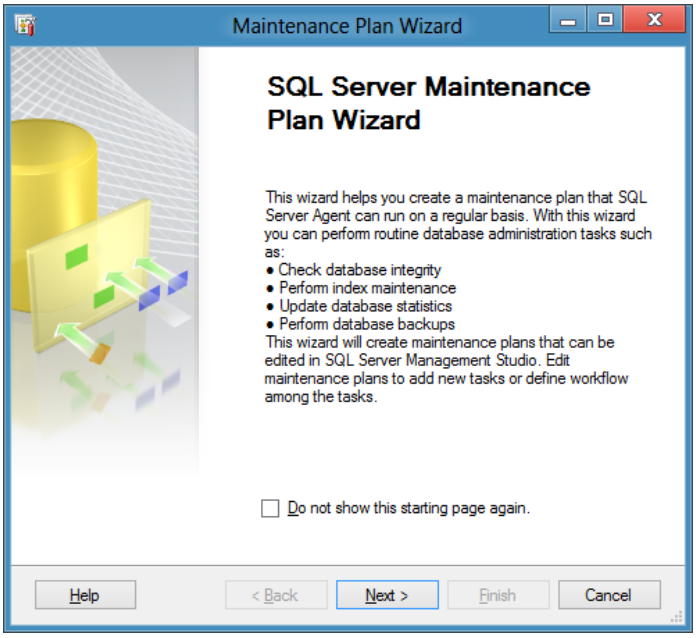
Regular re-indexing will greatly assist in the performance of the SQL database. We recommend re-indexing the WinRecs database according to the following guidelines:

Database Size	Frequency of Indexing
Databases < 5 GB in size	Re-index once per week
Databases 5 – 10 GB in size	Re-index twice per week
Databases 10-25 GB in size	Re-index every other day
Databases >25 GB in size	Re-index every day

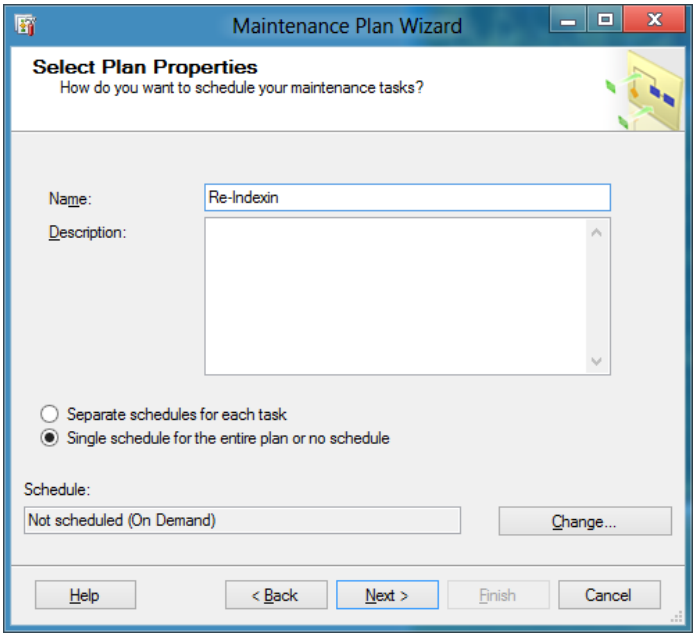
In SQL Server Management Studio, expand the tree to the Management options:



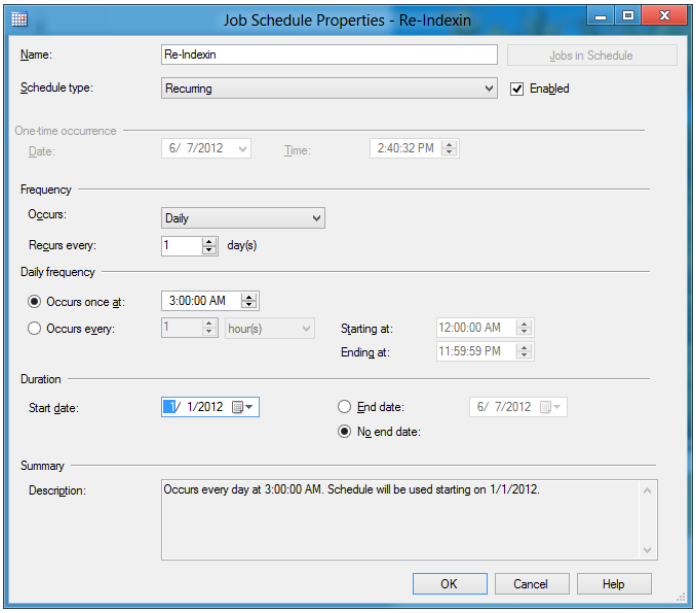
- Navigate to *Management*
- Right-click on *Maintenance Plans* and select *Maintenance Plan Wizard*



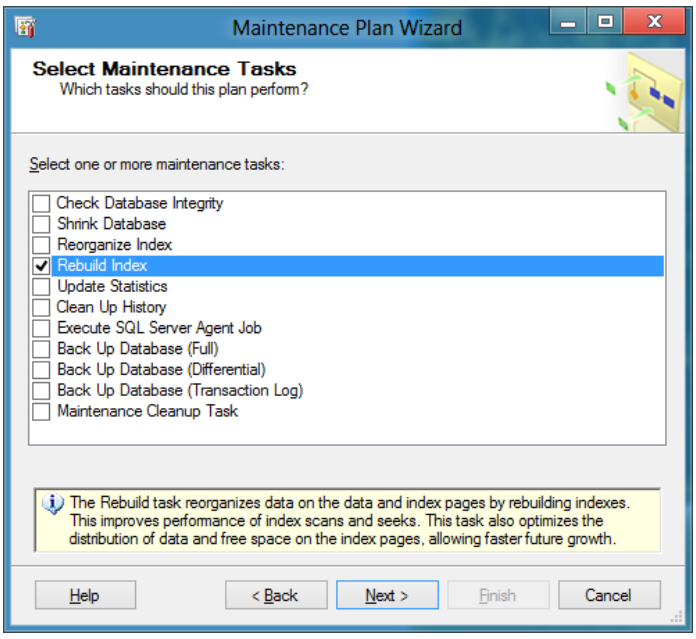
- Click *Next*



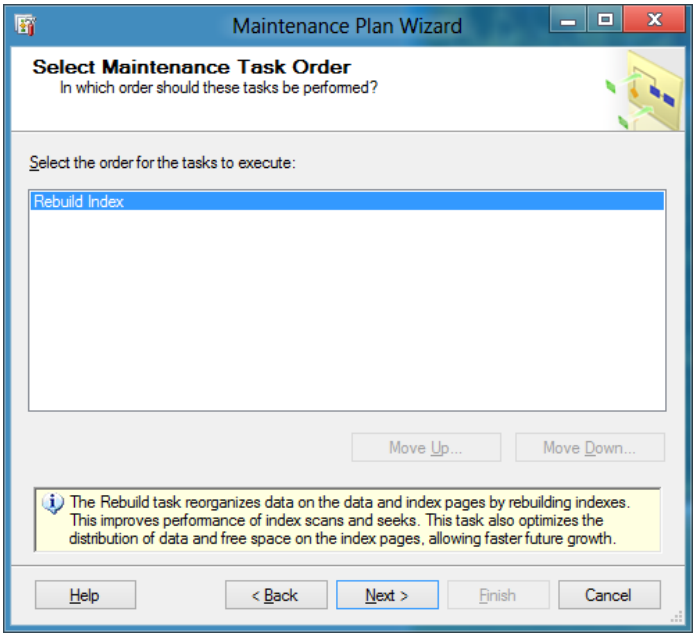
- Give the*Maintainance Plan* a name
- Before proceeding, click *Change* to define a schedule
- Click Next



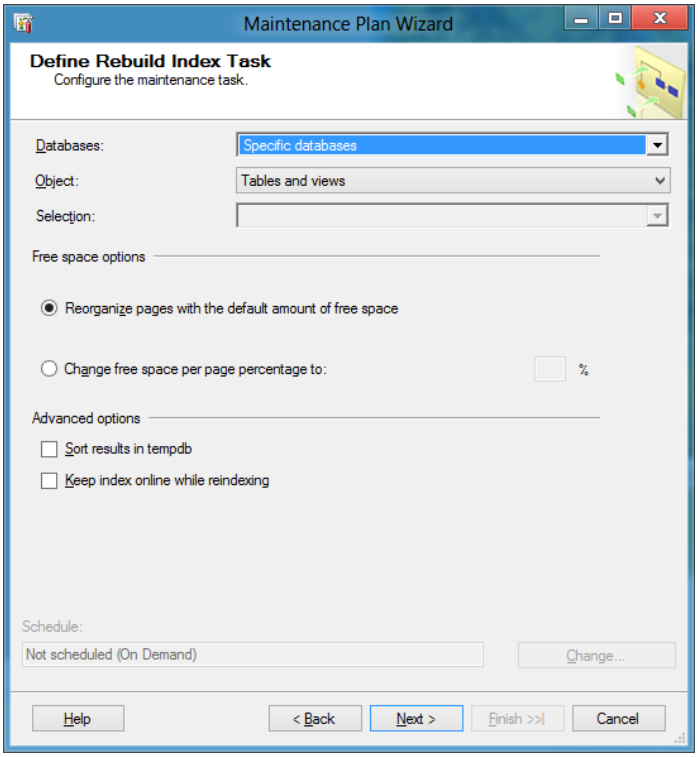
- Enter all the information to define the schedule for the job to run
- Click *OK* to return to the previous screen, then click *Next*



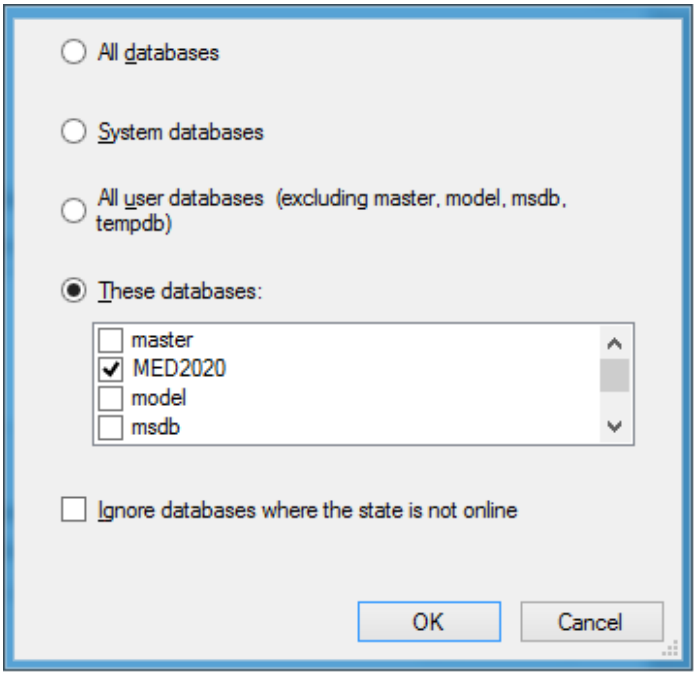
- Select *Rebuild Index*
- Click *Next*



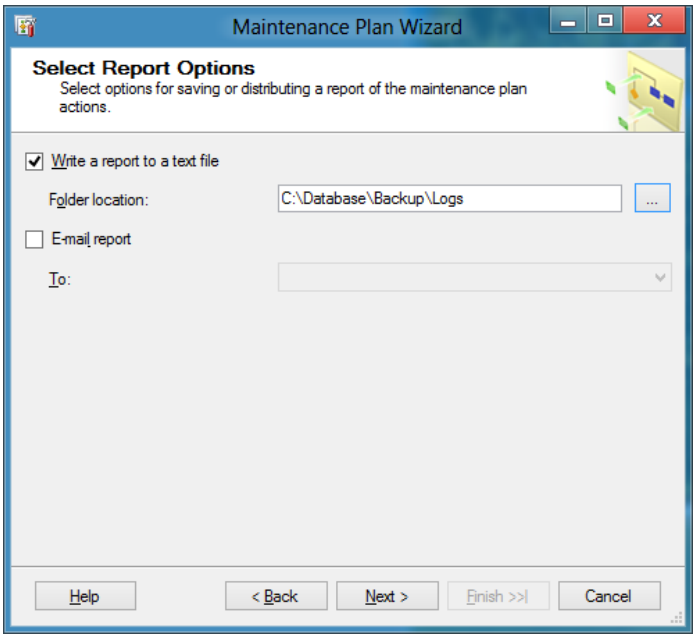
- Click *Next*



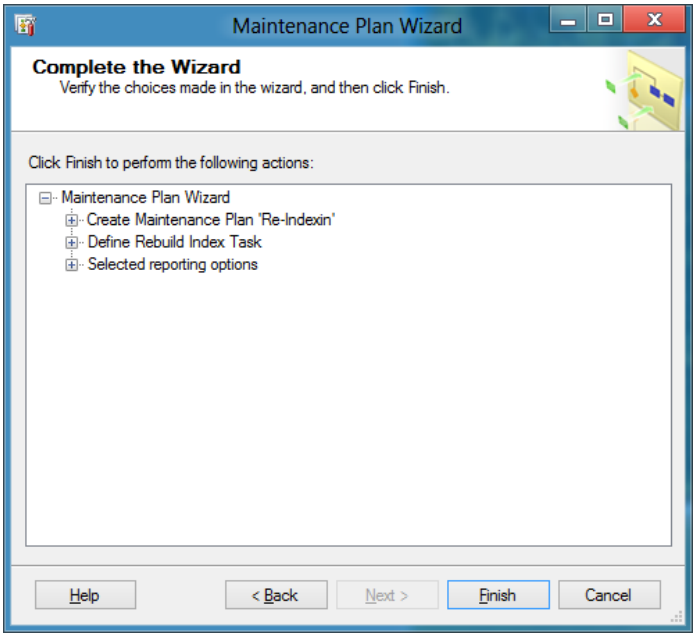
- Click on the *Databases* drop-down



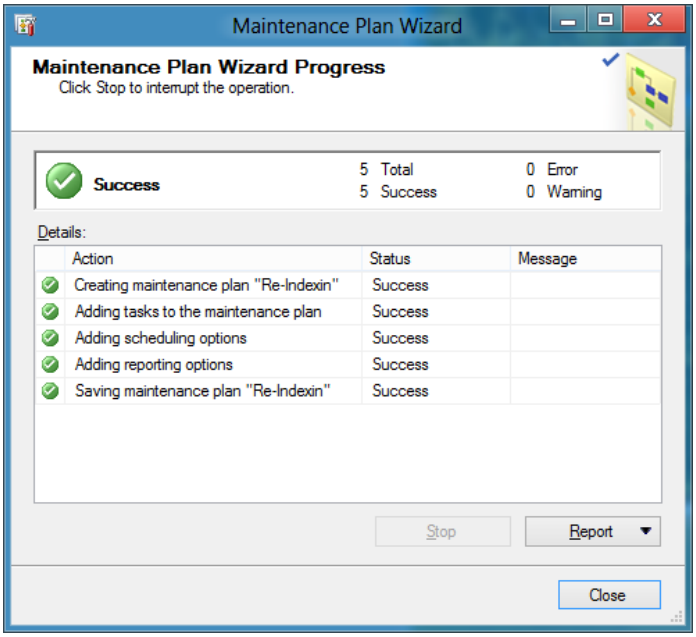
- Select *These Databases* and check your database, then click *OK*; this will return you to the previous screen. Click *Next* to proceed



- For *Folder Location*, click the ellipsis (…) and browse to the folder in which you wish to store your re-index logs, Click *Next*



- Click *Finish*



- Click *Close*

5 WinRecs Updates

Annual Release Updates, Service Release Updates, and Patches are intermittently made available to WinRecs customers to resolve critical issues, implement enhancements to the application or update important edits mandated by the Canadian Institute for Health Information (CIHI) and the provincial Ministries of Health.

5.1 Annual Release Updates

Annual Release Updates are provided at the end of each fiscal year. These updates contain all the edits and changes mandated for the new fiscal year. The annual release will be the next digit up in the current series (example 2016.1).

You must be working in the most recent service release from the previous year in order to apply the annual release; for example you must be on 2015.X in order to apply 2016.X service release.

5.2 Service Release Updates

Service Release Updates are usually made available at quarterly intervals. These updates are cumulative throughout the same annual version and include all previous patches. These software releases are to fix multiple outstanding issues. The first Service Release Update is numbered “2” (example 2015.2).

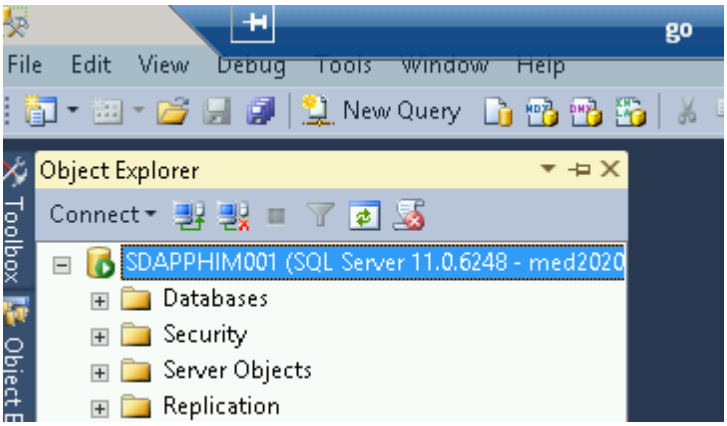
You must be working in the Annual Release Update that the Service Release Update is intended for; for example, you must be working in 2015.1 to be able to apply patch 2015.2.

5.3 Patch Updates

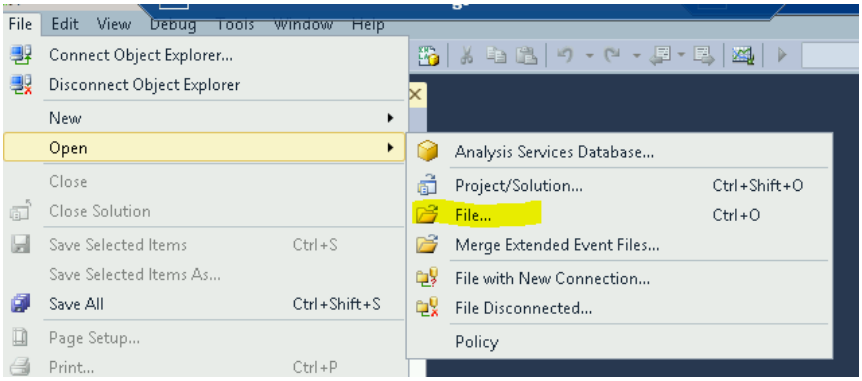
EXE Patch Updates are made available when a new feature, known issue or documentation is added and deemed ready for release before a quarterly Service Release Update is available.

5.3.1 Site Specific WinRecs Database Update

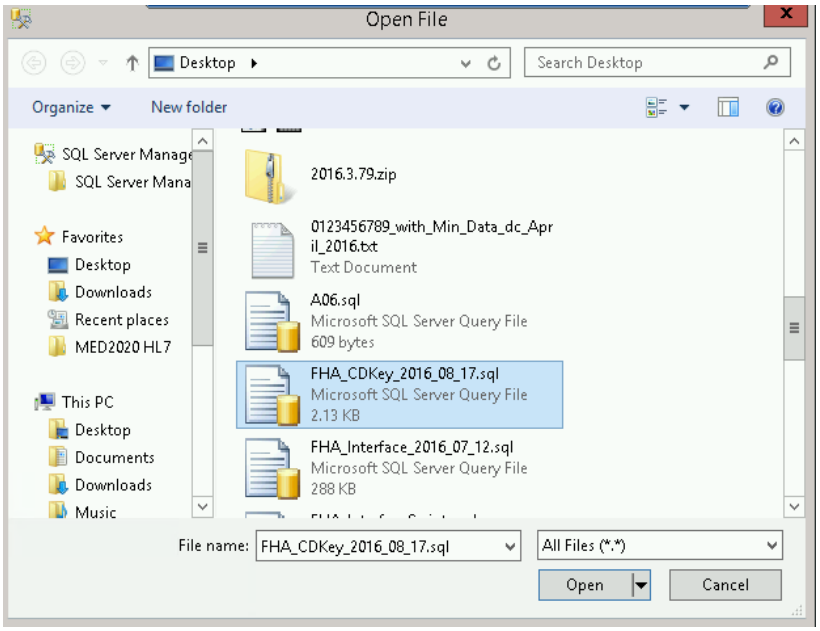
Open SQL Management Studio



Select the file menu, open and file

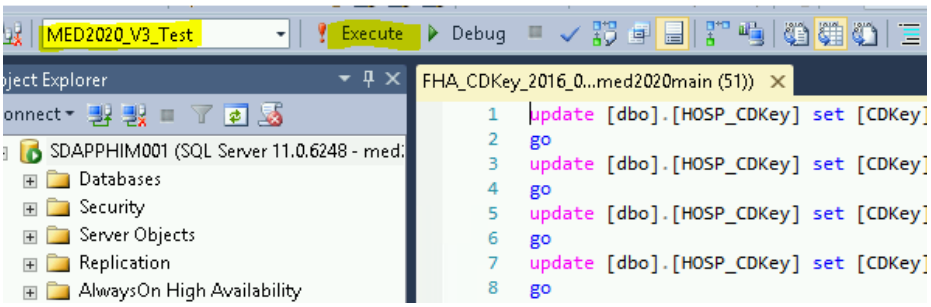


Select the update file and click open



Select the appropriate database from the drop-down menu

Click the Execute button



5.4 Required Steps for Updates

Annual Updates and Services releases include an executable for the client application and database. Both updates are run separately and performed differently.

5.5 Client Application

To run the client updates:

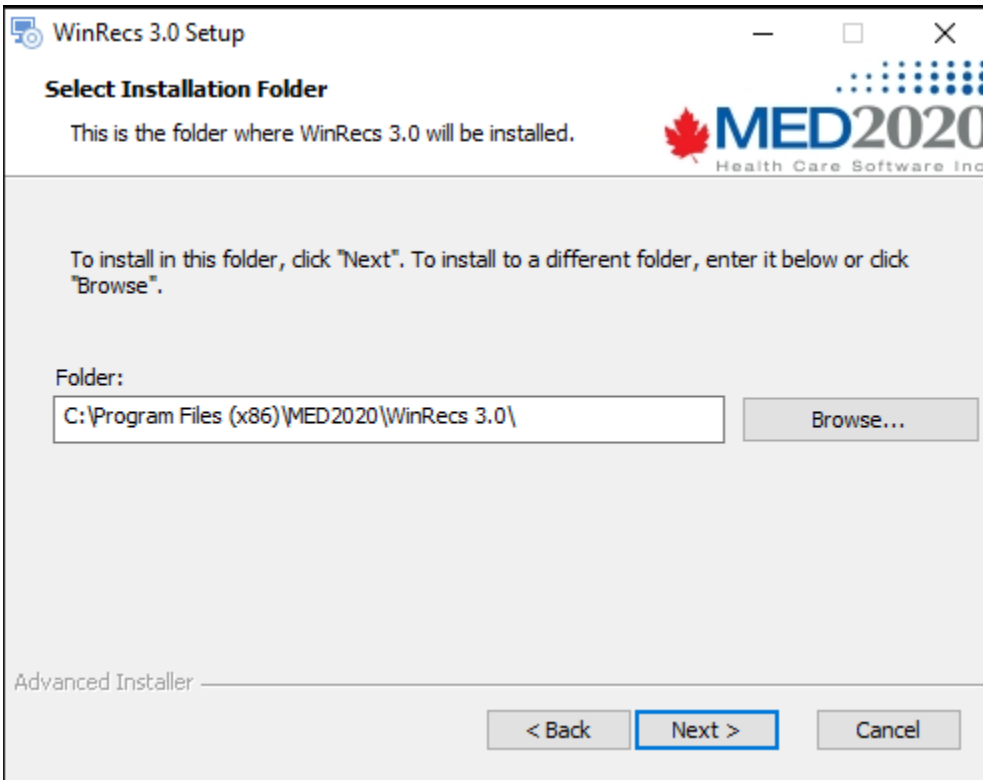
- Launch the provided WinRecs3Setup.exe
- On the Welcome to the WinRecs 3.0 Setup Wizard window.
- select Next.

End-User License Agreement window.

- In order to continue with the update, one must first accept the terms of the License Agreement. If you Agree with the terms and conditions, select the appropriate options below.
- Select Next.

Select Installation Folder.

- This window displays the default storage location for the files is shown. If needed this is where the user would change the destination folder if desired. Not recommended.
- Select Next.

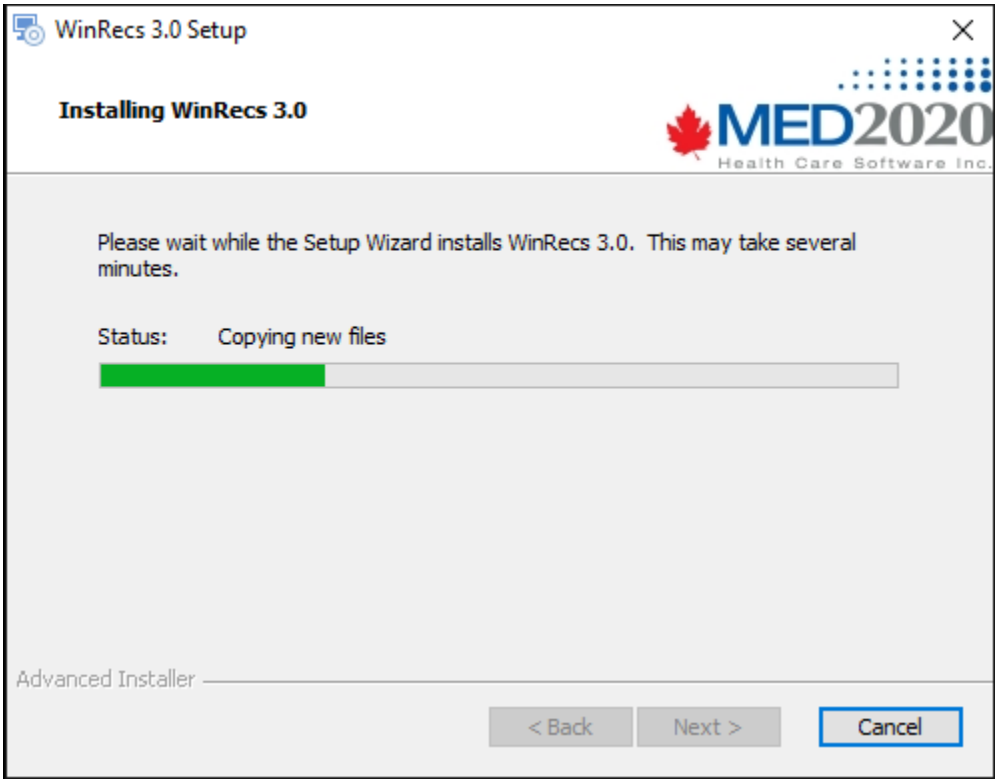


Ready to Install.

- The install is ready to begin.
- Select Install.

Installing WinRecs 3.0

- This window shows the progress of the installation.
- Please wait while the install is being executed.



Completing the WinRecs 3.0 Setup Wizard.

- The install is done.
- Select Finish.

Note: When running the client update the most recent release can be applied. There is no need to run the client updates consecutively.

5.6 Database Update – WinRecs Updater

Welcome to the WinRecs 2018.01 Database Update Wizard

> **Note:** The minimum database version that the 2018.01 updater will update is 2017.3.335 and newer. All clients must upgrade to 2017.3. prior to running the updater for 2018.01

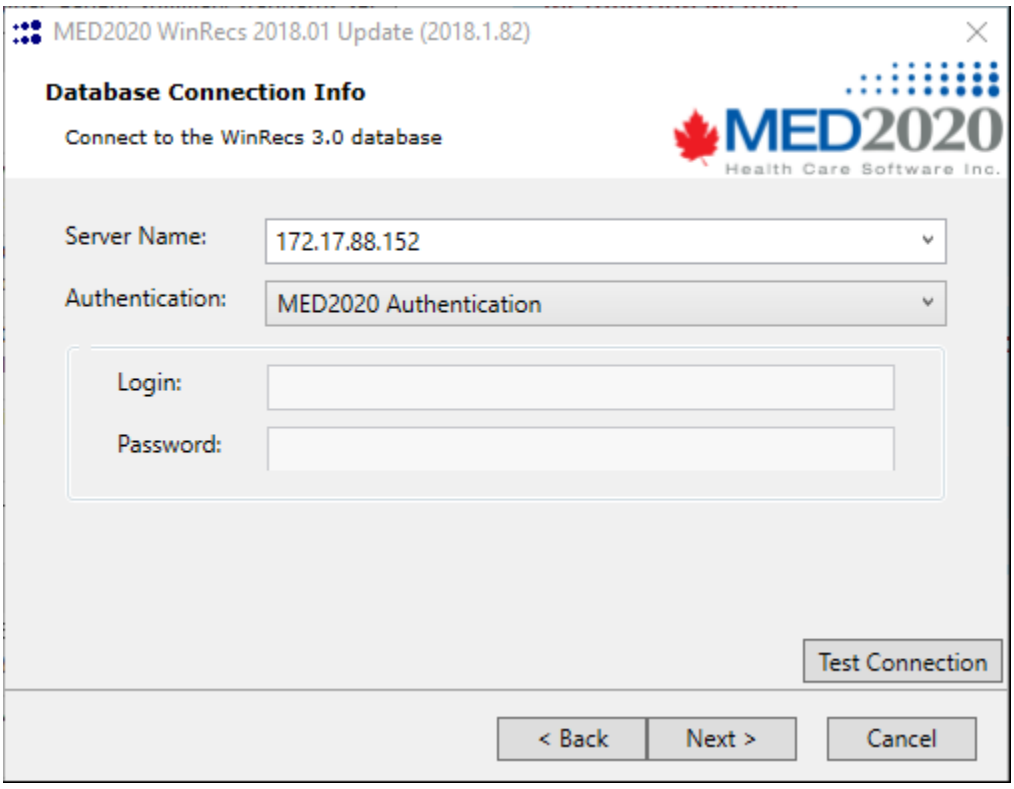
- Launch the provided WinRecsUpdater.exe
- Select Next.

End-User License Agreement

- Read the agreement details.
- In order to continue with the update, one must first accept the terms of the License Agreement. If you Agree with the terms and conditions, select the appropriate options below.
- Select Next.

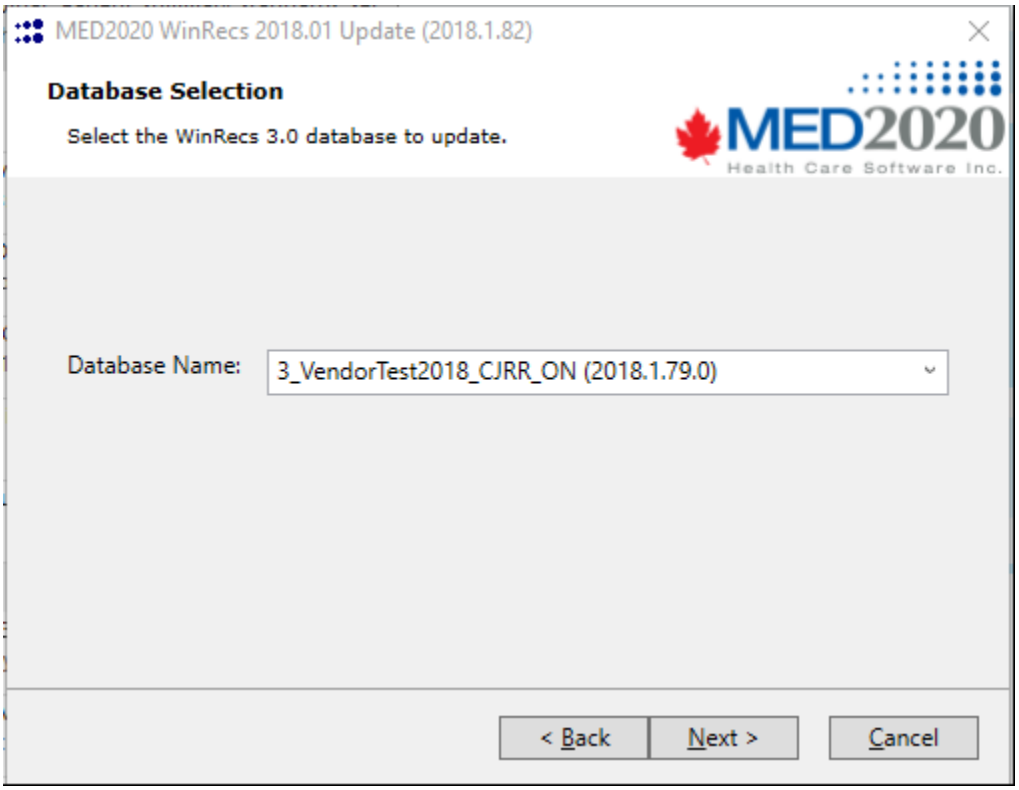
Database Connection Info

- Select the Sever Name.
- Select the type of Authentication.
- If user has selected the SQL Server Authentication, user will need to enter the login and password to connect to the server.
- Select Next.



Database Selection

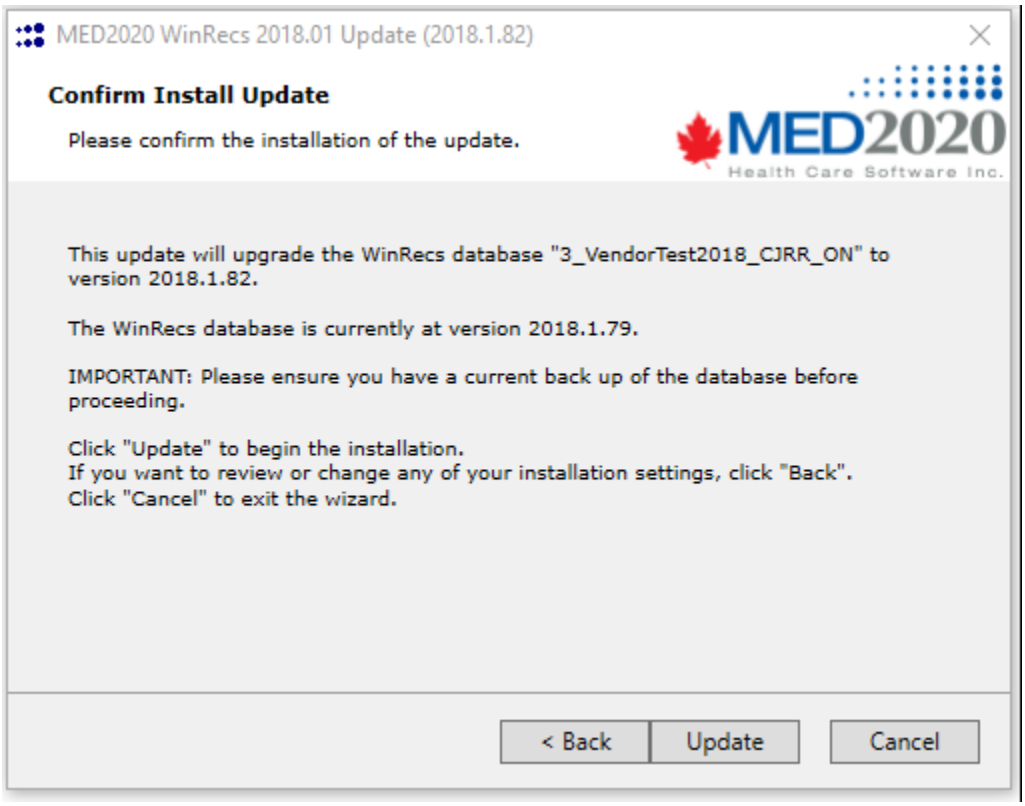
- Select the Database that the update will be applied to.
- Select next.



Note: The database names are now sorted and show their respective version.

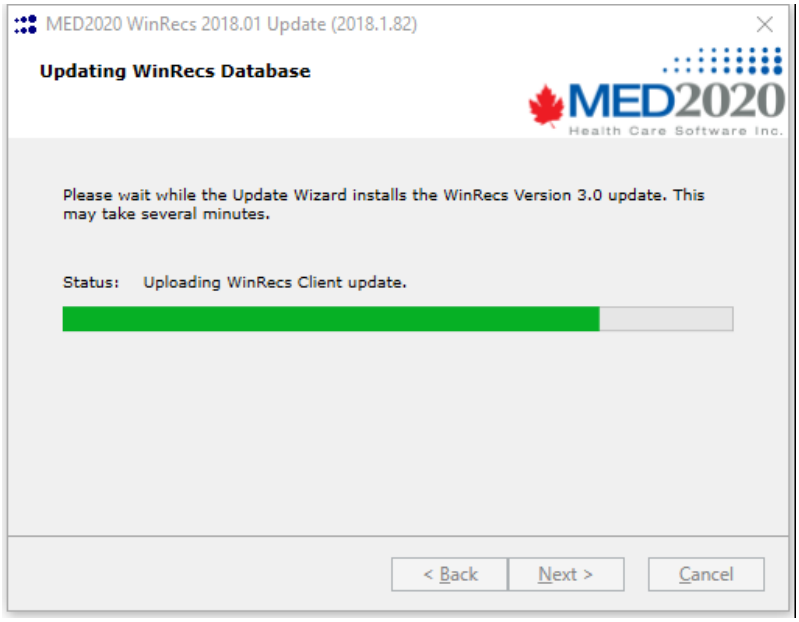
Confirm Install Update

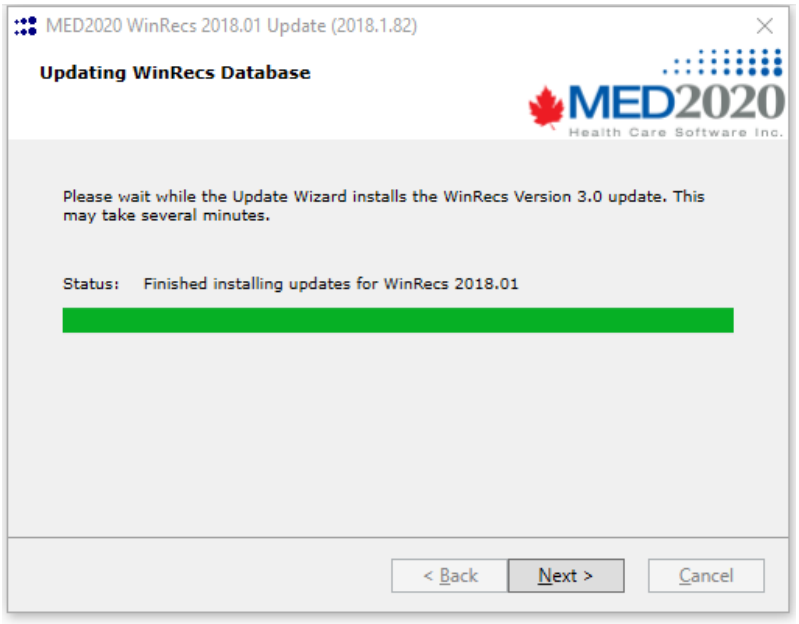
- This window shows the current version that the database is on and what version user is about to install. Verify that this information is accurate.
- Select Update.



Updating WinRecs Database

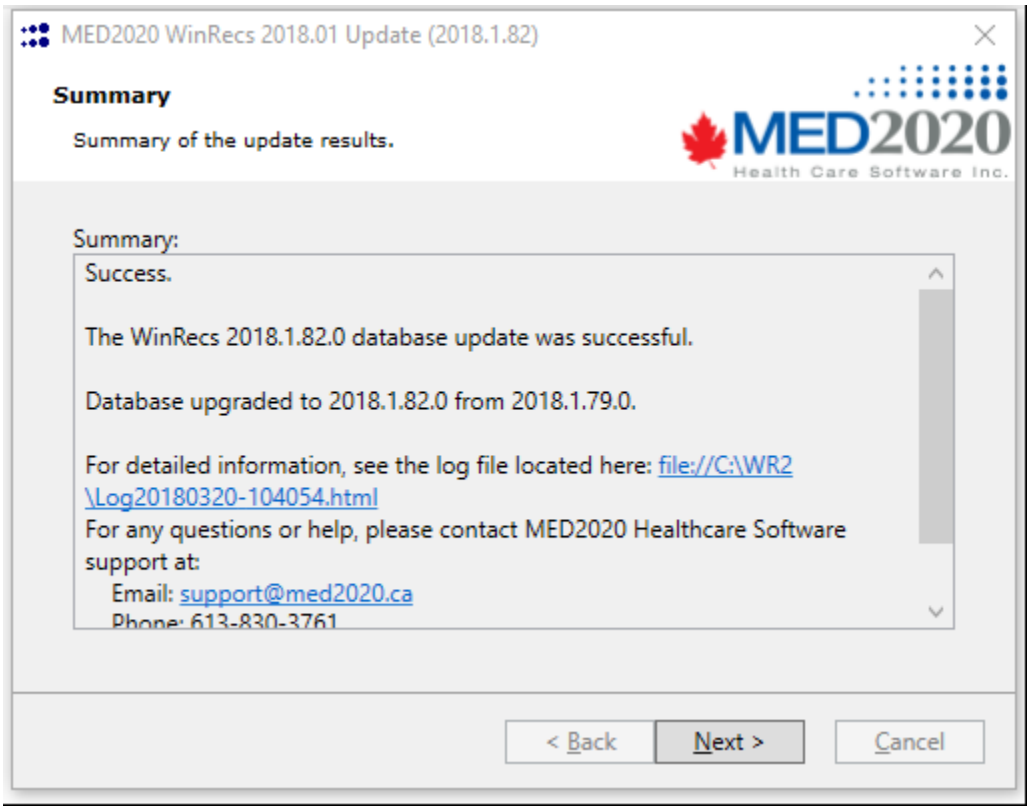
- User will see progress bar and the text box will show information as the script run.
- Once the script is completed, the status will show the update has completed.
- Select next.





Summary

- The summary information describes the success of the update and where the log files are saved if needed for review.
- Select next.



Completed the WinRecs Database Updater Wizard

- User is finished with the installation.
- Select Finish.

5.7 Grouper

Grouper updates are modified annually to meet the CIHI requirements. MED2020 handles these changes by incorporating then with the fiscal year update.

6 INTERFACES

6.1 Batch IN Interface

The following instructions detail the process for installing a Batch In (BI) Interface for WinRecs 3.

A Batch Interface is a custom module that is used to import text files containing specifically-formatted patient data into WinRecs. This data is produced by an external patient records system, such as an ADT system.

Note: Batch Interfaces are custom modules that are developed on a per-client basis. If you have any questions regarding this process, contact a MED2020 Client Services Representative. Contact information is available above in the section 'Contact MED2020'.

6.1.1 Creating / Modifying a BI

The BI is delivered in a SQL script file. Execute this script in SQL Server Management Studio against the WinRecs 3 Database. The process will be the same for the installation of a new BI interface or an upgrade/modification to an existing one.

6.1.2 Running the BI Interface

Details on how to run the BI are provided in the WinRecs User Guide in Section 4.3 Batch Interfaces. Please refer to this document if you require detailed information on how to run the BI.

6.2 HL7 Interface

To Install WinRecs 3 HL7 Services (Listener and Queue) run **`WinRecs3HL7Setup.exe`**

Install package opens:

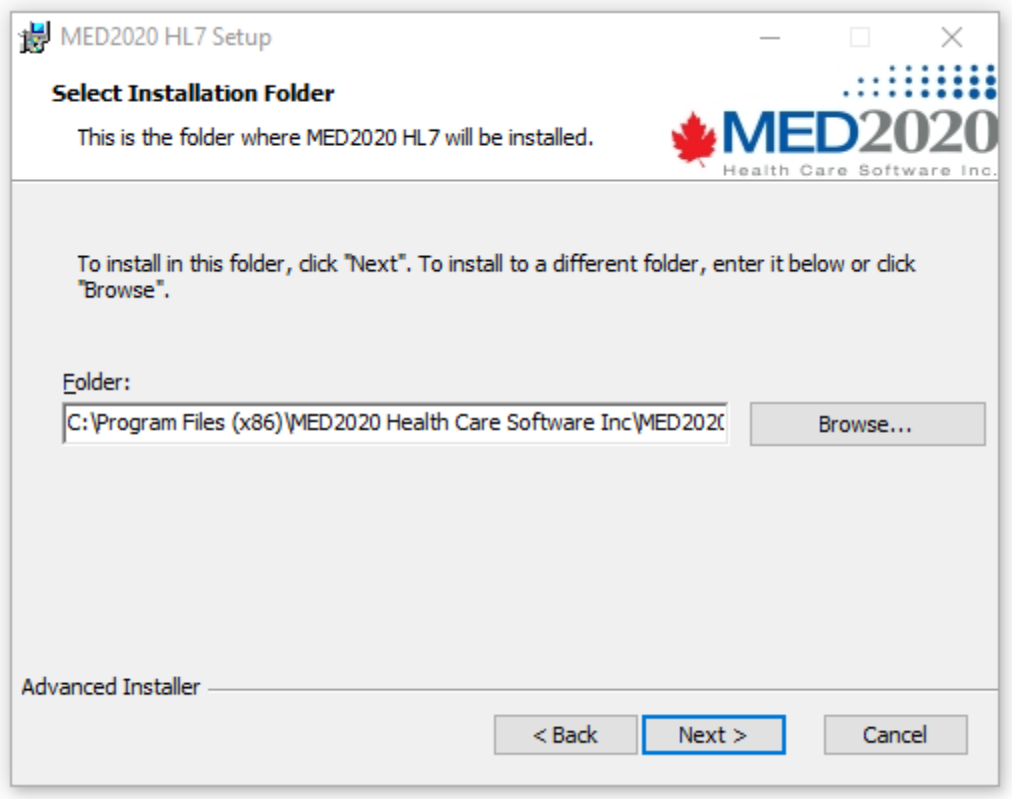
Note:	The WinRecs 3 HL7 interface requires minimum .NET 4.0 Framework and WinRecs 3 Database to function.

Click **Next >**

Ensure check box “I accept the terms in the License Agreement” is checked and click **Next >**

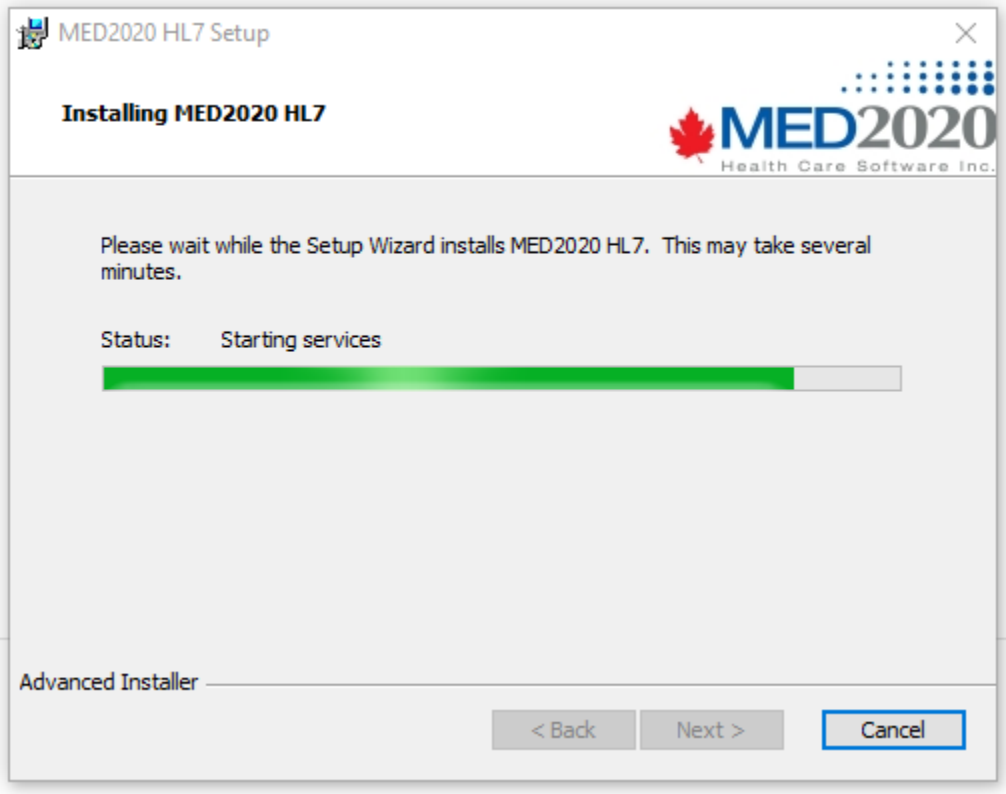
Default folder path for client install is C:\Program Files (x86)\MED2020 Health Care Software Inc\MED2020 HL7\. Edit if required.

Click **Next >**



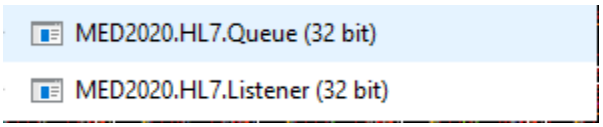
Setup is now complete. Click **Next >** to begin installation

Install process commences



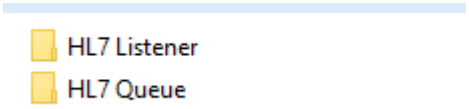
When installation is completed you will see the below screen. Click **Finish**

Task Manager will now show the two new services:



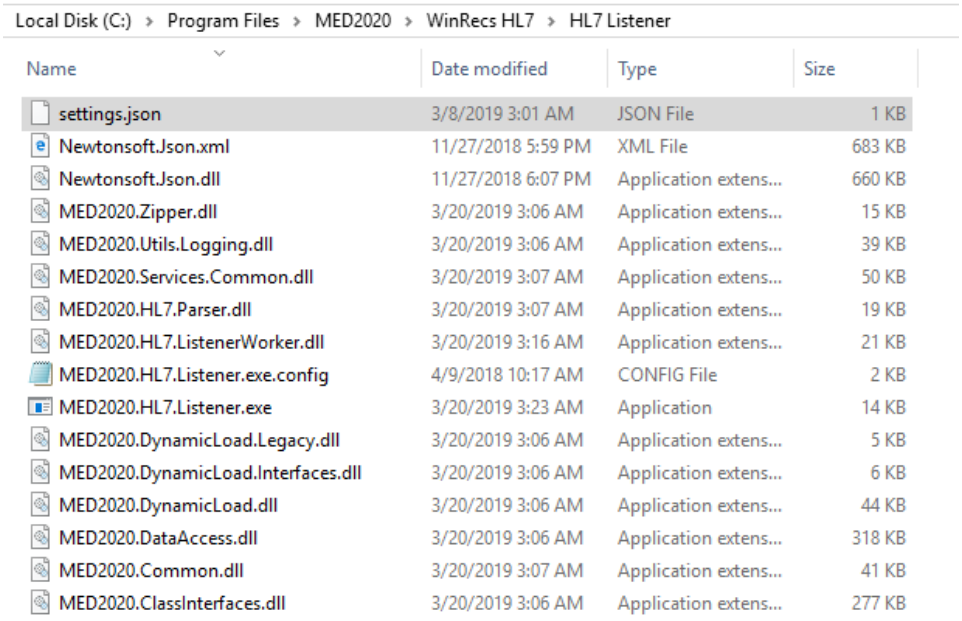
6.2.1 Configuring HL7 Interface

The install package creates two folders HL7 Listener and HL7 Queue. The default path is “C:\Program Files\MED2020\WinRecs HL7”
Your MED2020 HL7 folder content should look like this:



In each folder, you will find a settings file to configure “settings.json”:

- C:\Program Files\MED2020\WinRecs HL7\HL7 Listener\settings.json
- C:\Program Files\MED2020\WinRecs HL7\HL7 Queue\settings.json



6.2.2 Editing the settings.json file

Both the Listener and Queue settings.json files contain these keys that requires you to edit according to your set up. To edit a settings.json file, right click the file and open up the file in notedpad or another text editor.

Here is an example of the contents of a settings.json file. The colour has been added in this guide as a reference.

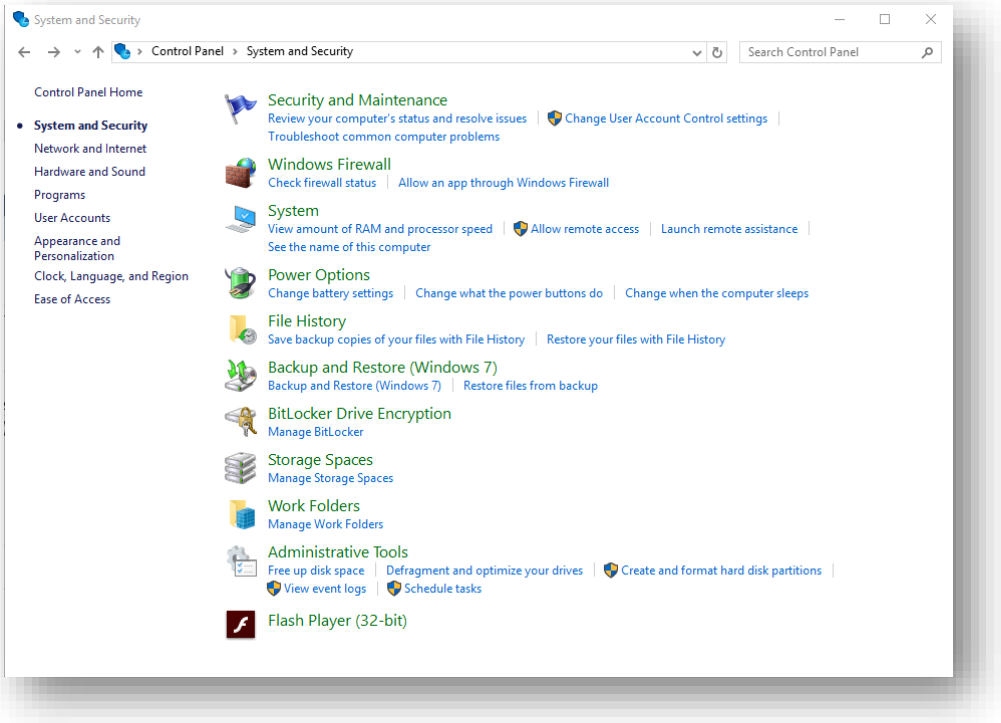
```
{
  "environments": [
    {
      "enabled": true,
      "name": "Live",
      "server": "SQL_SERVER",
      "database": "DATABASE_LIVE",
      "ports": [ 2020 ]
    },
    {
      "enabled": false,
      "name": "Test",
      "server": "SQL_SERVER",
      "database": "DATABASE_TEST",
      "ports": [ 2021, 2222 ]
    }
  ]
}
```

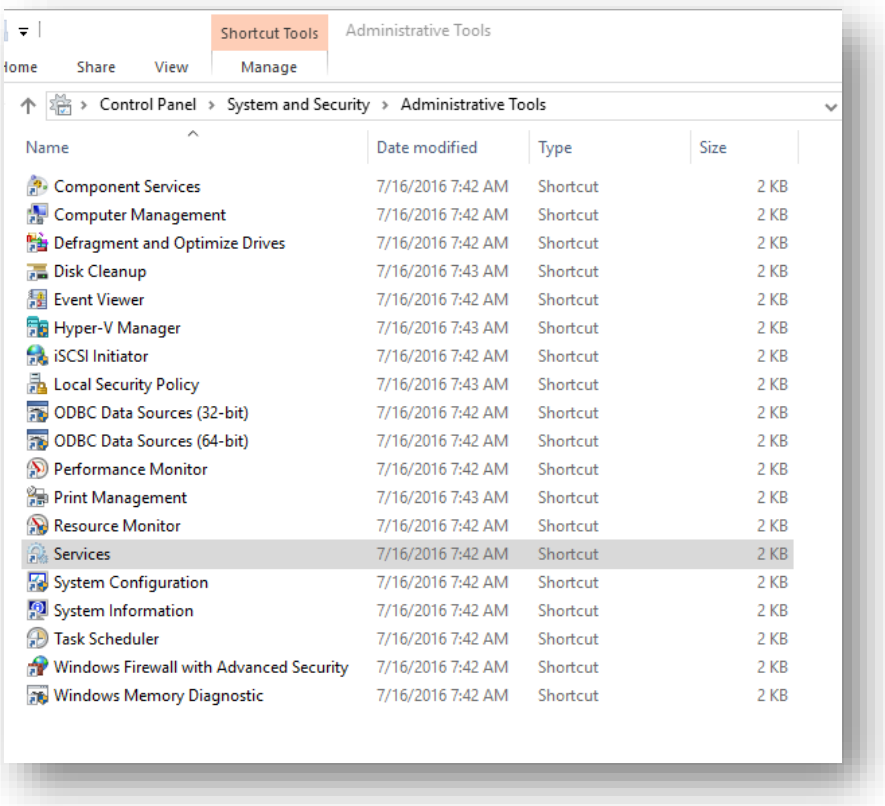
Legend:

"enabled" – A value of "true" will activate and a value of "false" will deactivate.
"name" – This is a description of the HL7 feed. Any value can be used as long as it is unique.
"**server**" – Enter the server name or IP address of the applicable database
"**database**" – Enter the database name to recieve the HL7 feed
"**ports**" – The TCP/IP port used by the HL7 sender. If there are multiple ports, separate with commas. (Not applicable for HL7 Queue settings.json file)

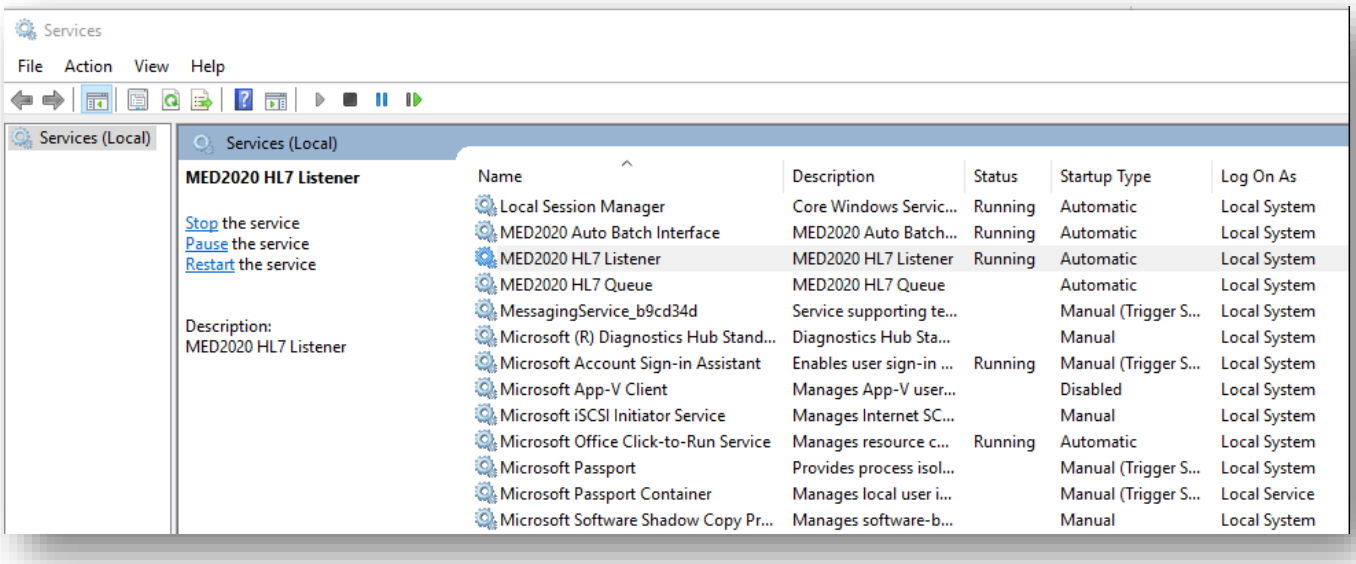
6.2.3 How to Stop and Start HL7 Services on WinRecs Server

Go to Control Panel → System Security → Administrative Tools





Double click Services



There are two HL7 services:

- MED2020 HL7 Listener

- MED2020 HL7 Queue

To Stop a service right click on the service and select stop

To Start a service right click the service and select start

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