

Installation Instructions for Medisoft 15 Network Professional

WARNING: If you are installing over a previous version of Medisoft, it is very important that you back up your data. Refer to the Medisoft Online Help for instructions on backing up your data.

NOTE: Medisoft 15 includes a new version of Advantage Server. Make sure that you complete the Server Installation Setup section of these instructions along with the other sections.

System Requirements for Medisoft Version 15

Minimum Workstation System Requirements

Pentium III – 500+ MHz processor, 500 MB available hard disk space, 256 MB RAM, 256 color display, Windows 2000 Professional or Windows XP Professional, Windows Vista (32-bit) Business

NOTE: 256 color display minimum supported; may limit some features, 16 bit or higher recommended, Windows XP Home not supported

Recommended Workstation System Requirements

Pentium 4 2.6Ghz processor or higher, 1GB of available hard disk space, 512 MB of RAM, 16+ color display, Windows Vista (32-bit) Business or Windows XP Professional

Server System Requirements

Pentium 4 2.6Ghz processor or higher, 2 GB of available hard disk space, 2 GB of RAM, 16+ color display, Windows 2000 Server (Minimum) or Windows 2003 Server (Recommended)

System Requirements for Medisoft Clinical

Minimum System Requirements

Windows 2003 Server Standard edition for the server with at least 4 GB of RAM; Database Platform: c-tree Server version 7.12 - (Standard) for Windows NT/2000/XP; and Windows XP SP2 or higher or Windows Vista (32-bit) Business edition for the client

Medisoft Clinical Recommended Hardware Requirements - *for small practices (1 to 25 users) using a single server*

Single Processor: Dual core 2.0GHz+ or Quad core 1.8GHz+, RAM: 4 GB, System Drive: 32 GB or higher, Data Drive: RAID-5, Network Card: 1 Gbps, Optical Drive (DVD): Required, Tape Backup: VXA, DLT or LTO (large enough to backup entire Medisoft Clinical folder), Video: 1024x768, UPS (Battery): 1500VA or higher

Step One: Installing the Advantage Database Server

NOTE: You must have administrative privileges to complete the installation.

Pre-Server Installation Setup

1. Designate a computer as the server. Use this server for storing your data. **NOTE:** Do not also use the server as a workstation.
2. Create a folder for the root data path (that is, Medidata). Use the UNC (Universal Naming Convention) address to designate the shared folder (for example, \\ServerName\FolderName).

3. Set up file sharing on the designated server. For more information on configuring file sharing on a server, review the Windows Server Online Help.

To share the root data folder, open **Windows Explorer** and select the root data folder. Select **Sharing and Security**. On the **Sharing** tab, click **Share this folder** and click the **Permission** button. Select **Full Control**. Click **OK**. Click **OK**.

Server Installation Setup

1. If you are not installing over a previous version of Advantage go to Step 2.

If you are installing over a previous version of Advantage: click **Start** and navigate to the **Control Panel**. From the **Control Panel** select the **Performance and Maintenance** option. Then select **Administrative Tools** and then **Services**.

NOTE: depending on your version of the Windows operating system and if you are using the Classic view option, the **Performance and Maintenance** option does not always appear. In this case, go to the **Administrative Tools** option.

Find **Advantage Database Server** and right-click. Select **Stop**.

2. Insert the Medisoft 15 CD in the server CD-ROM drive. The **Installation** window appears.

NOTE: If the **Installation** window does not appear automatically, click **Start** and select **Run**. The **Run** window appears. On the **Run** window in the **Open** field, type **X:\AUTORUN** (where **X** is your CD-ROM drive letter) and click **OK**. The **Installation** window appears.

3. On the **Installation** window click the **Advantage Tools** link.

Click the **Advantage Server** link. The **Advantage Database Server for Windows NT/2000/2003 v8.1** window appears.

4. On the **Advantage Database Server for Windows NT/2000/2003 v8.1** window, click **Next**. The **License Agreement** window appears.

5. On the **License Agreement** window, select the **I accept the terms in the license agreement** radio button and click **Next**. The **Select Installation Folder** window appears.

6. On the **Destination Folder** window, select a directory for the Advantage Database Server installation. The default location is the recommended choice. To select the default location, click **Next**.

Option: click **Change** to select a different directory other than the default selection. On the **Change Current Destination Folder** window, navigate to the desired location. Then click **OK**. On the **Destination Folder** window, click **Next**.

7. On the **Ready to Install the Program** window, click **Install**. A progress bar appears tracking the installation. The **Product Information** window appears.

8. On the **Product Information** window in the **Serial Number** field, enter the Advantage serial number. Select the **I have a product validation code** radio button. In the **Validation Code** field, enter the validation code. Refer to the Advantage Certificate of Authenticity included with the installation materials for the serial number and validation code. Click **Next**.

9. On the Product Owner window in the **Registered Owner** field, enter the name of the registered owner.

Select the **Automatic Startup** radio button (recommended choice). If the **Manual Startup** option is selected, refer to the online help for instructions on starting and stopping the Advantage Database Server. Click **Next**. The **ANSI Character Set** window appears.

10. On the **ANSI Character Set** window select from the drop-down list an appropriate character set. The recommended choice is the default selection, **ENGL(AMER)**, for American English. Click **Next**. The **Installation Complete** window appears.
11. On the **Installation Complete** window, which indicates that database server engine has been successfully installed, click **Finish**. If the **Show the readme file** checkbox is selected, the Advantage readme file opens. Review and when finished, close the window. If an **Advantage Configuration Utility** window is open, click **Exit** to exit.
12. Option: On the **Medisoft Installation** window, click the **Exit** link or continue other installation processes.

Step Two: Installing Medisoft Network Professional

There are two methods available for installing Medisoft Network Professional:

- **Option A:** Copy the program installation file to a shared drive and then install the program on each workstation from the shared drive—do not need to use the CD for the program install on each workstation.
- **Option B:** Install the software on each workstation using the Medisoft 15 CD.

Step Two Option A: Copying the Client Install to the Shared Drive

1. Insert the Medisoft 15 CD in the server CD-ROM drive. The **Installation** window appears.
2. On the **Installation** window click the **Copy Medisoft Client** link.

If installing on the Windows Vista platform, the **User Account Control** window appears. Click **Allow**.

The **Welcome** window appears.

3. On the **Welcome** window click **Next**. The **Choose Destination Location** window appears.
4. On the **Choose Destination Location** window, select a shared directory for the program files on the network (the default path is recommended). Click **Next**. The **Start Installation** window appears.
5. On the **Start Installation** window, click **Next**. The install.exe is copied to the shared directory.
6. Click **Finish**.
7. Click the **Exit** link on the **Installation** window.

8. From each client workstation navigate to the shared drive and double-click the **INSTALL.EXE** file. The installation program launches and the **Warning** window appears.
9. On the **Warning** window click **Next**. The **Welcome** window appears.
10. On the **Welcome** window select the **Installation type** by clicking the radio button next to the type of product you purchased. Click **Next**.

NOTE: The first four digits of the product serial number identify the product type.

11. On the **Software Licenses Agreement** window, click **I Accept**. The **Select Installation Type** window appears.
12. On the **Select Installation Type** window, click the **Express Install** radio button.

NOTE: This choice is the recommended option.

13. The **Install Communications Manager** check box is selected by default. If you do not want to install the Communications Manager, clear the box.

NOTE: Make sure the Install Communications Manager check box is selected, if you plan on using Communications Manager to connect to an EMR application such as Medisoft Clinical from this PC.

Click **Next**. The **Ready to Install** window appears.

14. On the **Ready to Install** window, click **Next**. The **Installing** window appears and tracks the progress of the installation.

If you do not have the current .NET framework on your computer, .NET is installed during the installation. The .NET installation on many PCs can take up to 15 minutes.

15. If you chose to install the Communications Manager, the **Communications Manager Installation** window appears. Click **Next**.

NOTE: If you did not choose to install the Communications Manager, go to step 17.

16. Once the installation is complete, the **Communications Manager Installation Completed** window appears. Click **Finish**.
17. The **Installation Completed** window appears. Click **Finish**. The installation program closes.

Option: on the **Installation Completed** window, select the **Launch Medisoft 15** check box. Click **Finish**.

18. Repeat Steps 8 through 17 for each client workstation.

Step Two Option B: Installing Medisoft Directly on Each Workstation

1. Insert the Medisoft 15 CD in the local CD-ROM drive. The **Installation** window appears.

NOTE: If the **Installation** window does not appear automatically, click **Start** and select **Run**. The **Run** window appears. On the **Run** window in the **Open** field, type **X:\AUTORUN** (where **X** is your CD-ROM drive letter) and click **OK**. The **Installation** window appears.

2. On the **Installation** window click **Install Medisoft**.

If installing on the Windows Vista platform, the **User Account Control** window appears. Click **Allow**.

The **Warning** window appears.

3. On the **Warning** window click **Next**. The **Welcome** window appears.
4. On the **Welcome** window select the **Installation type** by clicking the radio button next to the type of product you purchased. Click **Next**.

NOTE: The first four digits of the product serial number identify the product type.

5. On the **Software Licenses Agreement** window, click **I Accept**. The **Select Installation Type** window appears.
6. On the **Select Installation Type** window, click the **Express Install** radio button.

The **Install Communications Manager** check box is selected by default. If you do not want to install the Communications Manager, clear the box.

NOTE: Make sure the Install Communications Manager check box is selected, if you plan on using Communications Manager to connect to an EMR application such as Medisoft Clinical from this PC.

Click **Next**. The **Ready to Install** window appears.

7. On the **Ready to Install** window click **Next**. The **Installing** window appears and tracks the progress of the installation.

NOTE: If you do not have the current .NET framework on your computer, .NET is installed during the installation. The .NET installation on many PCs can take up to 15 minutes.

8. If you chose to install the Communications Manager, the **Communications Manager Installation** window appears. Click **Next**.

NOTE: If you did not choose to install the Communications Manager, go to step 10.

9. Once the installation is complete, the **Communications Manager Installation Completed** window appears. Click **Finish**.

10. The **Installation Completed** window appears. Click **Finish**. The installation program closes.

Option: on the **Installation Completed** window, select the **Launch Medisoft 15** check box. Click **Finish**.

11. Repeat steps 1 through 10 for each client workstation.

Step Three: Accessing and Registering Medisoft from the Workstations

When you purchased Medisoft Network Professional, you also purchased a number of connections for your network.

After Medisoft has been installed on each computer, run the program on any workstation. The first time the program opens, a data conversion message appears. Consider backing up data before completing data conversion.

If you are working with multiple practices, each time you open a new practice that particular practice also needs to be converted until all practices have been converted to Version 15.

After installation and after Medisoft 15 launches for the first time, the Registration window appears. Register now or within 30 days after installation. For instructions or questions on registering, click the Help button on the Registration window.