



Allscripts TouchWorks EHR™

## **CareGuide Installation Instructions**

### **Release 15.2**

**Last Updated: 6/17/2015**



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 Allscripts™	TouchWorks EHR CareGuide Installation Instructions
<b>Release Date</b>	June 2015
<b>Release</b>	15.2 CareGuide Release
<b>Supported TouchWorks EHR Versions</b>	11.1.x 11.2.x 11.3.x 11.4.x 11.5.x
<b>Installation Requirements</b>	See assumed starting conditions

## Installation Instructions for 15.2 CareGuide Release

Follow these steps to transfer and load the **15.2 CareGuide Release**.

This should be done after hours, but will not require any system down time. If you have any problems executing this process, please open a ticket in the [Client Support Portal](#) with details on the problems you are having.

See the *15.2 CareGuide Release Notes* for important information regarding the release and the *15.2 CareGuide Release Listing* for the list of CareGuides that were revised.

### Assumed Starting Conditions

- We recommend the target server have **TouchWorks EHR V11.1.4 or later** installed.



- Target server must have the **3Q 2011 Medcin Data Release or later** installed. We always encourage clients to stay current with Medcin Releases.
- The server where the installer is executed must have **.NET 3.5** or above installed.
- Target server must have the **Delta Process** successfully running before the installation occurs to account for any medication state changes in CareGuide order sets.
- Target server must have the **ATP Process** successfully running before the installation occurs to account for any Problem Terminology state changes in CareGuide problem linking.
- The upgrade process requires approximately 475 MB of free disk space to perform the installation

Location	Minimum Free Space
Installation Folder	200 MB
Data File Folder for AHSOCD	200 MB
Log File Folder for AHSOCD	75 MB

- In addition to the disk space noted above, the target server must have adequate disk space to accommodate standard backup procedures and planned rollback during processing. Most of the disk space is recoverable by using the database administrative utilities to reduce the Works database log file size after the install.
- **You MUST install this in your Test system first, prior to installing in Live.**
- **You MUST back up your Works Database prior to running this process.**

## Special Considerations

- If your database server hosts multiple clinical (Works) databases, this installer will need to be executed once for each of those databases.

## Setting up the CareGuide Release Install Package

1. Copy the file **15.2\_CareGuides.msi** from [ftp://ahsftp.allscripts.com/2\\_CareGuide\\_Updates](ftp://ahsftp.allscripts.com/2_CareGuide_Updates) to the database server of the environment you wish to update (i.e. Test, Live).
2. You MUST run the installation from the active node of the database server for the environment.
3. You MUST be logged into the server with an account that has administrative privileges.

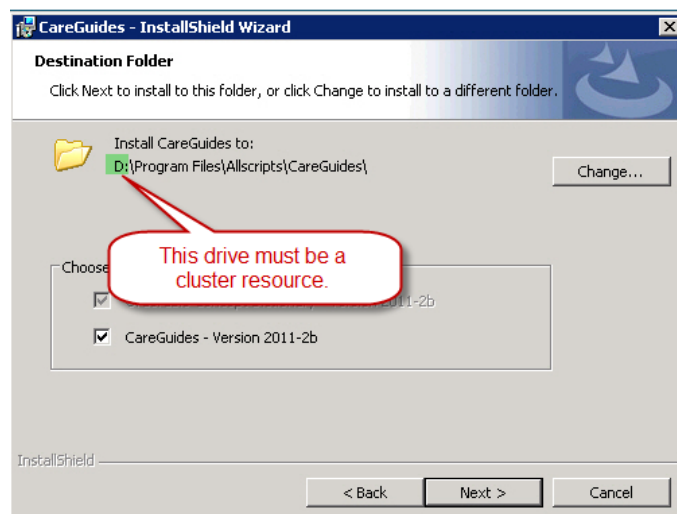
## Special Considerations for Database Clusters

**Note:** In Step 3 below (Setting the Destination Folder), you must follow these instructions when installing to a cluster or else the installation will fail.

A special database, AHSOCD, is used to deliver CareGuide content to your clinical (“Works”) database(s). Some of the initial actions performed by the installer are:

1. Determine the current data and log file locations for the existing AHSOCD database on the target server. These locations are used as the default locations for defining the Destination Folder.
2. Prompt the installer for destination folders for AHSOCD data and log files.
3. Drop the existing AHSOCD database.
4. Restore the new AHSOCD database using the file locations provided in the Destination Folder designation.

During installation, the AHSOCD backup file is unpacked to the installation directory selected on the second screen of the installer. **The drive letter selected must be a cluster resource.**



If you are uncertain which drives are cluster resources, execute the following SQL statement in SQL Server Management Studio:

```
USE master
```

```
SELECT DriveName FROM sys.dm_io_cluster_shared_drives
```

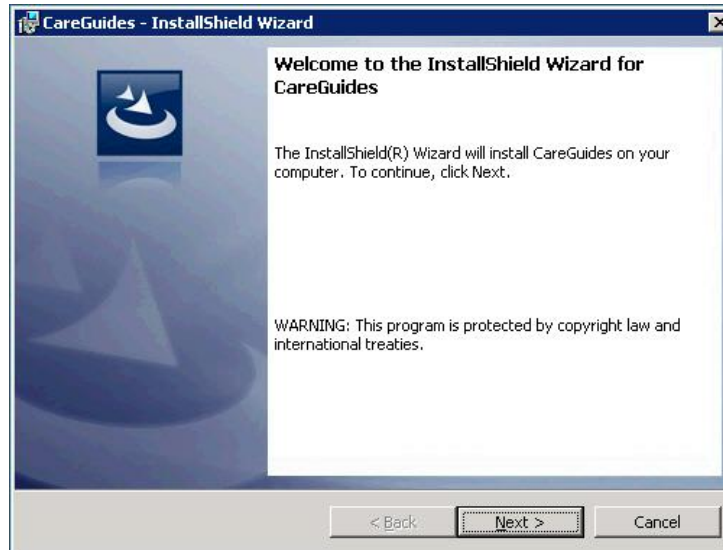
A result set containing the drive letters for the cluster shared drives will be returned:

Results		Messages
	DriveName	
1	T	
2	L	
3	D	

You must use one of these drives when determining where to install the CareGuides.

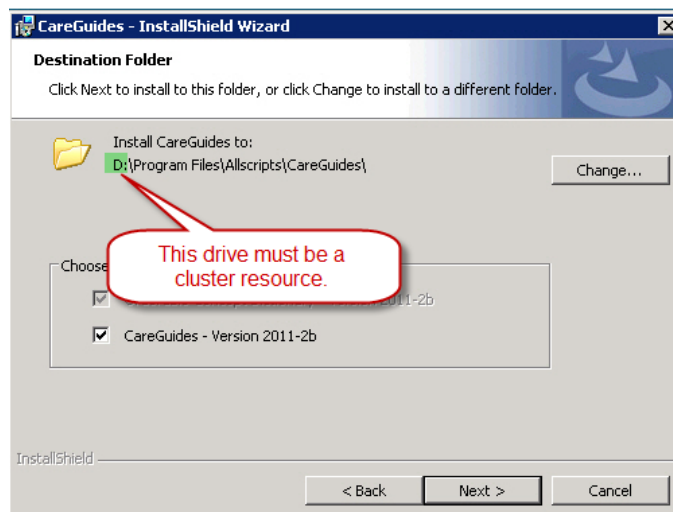
## Running the Install Package

1. Double-click the **15.2\_CareGuides.msi** file to begin the installation.
2. On the first screen of the installer, click the next button to begin the installation process.



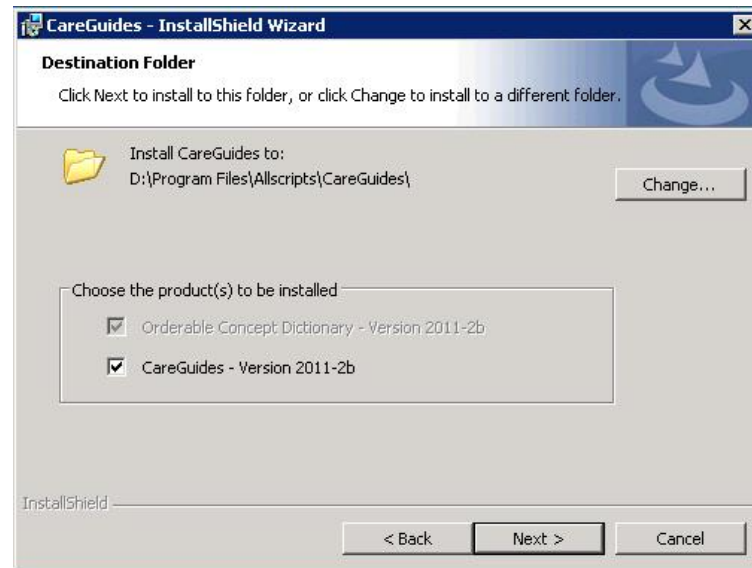
3. On the Destination Folder screen, accept the default installation location or click the **Change...** button to select a different destination folder. This location is used for support files used during the installation process. You may need to change Destination Drive if you are installing in a clustered environment.

*Clustered Database Note: If you are installing in a clustered environment, please refer to the “Special Considerations for Database Clusters” section of this document immediately before this section.*

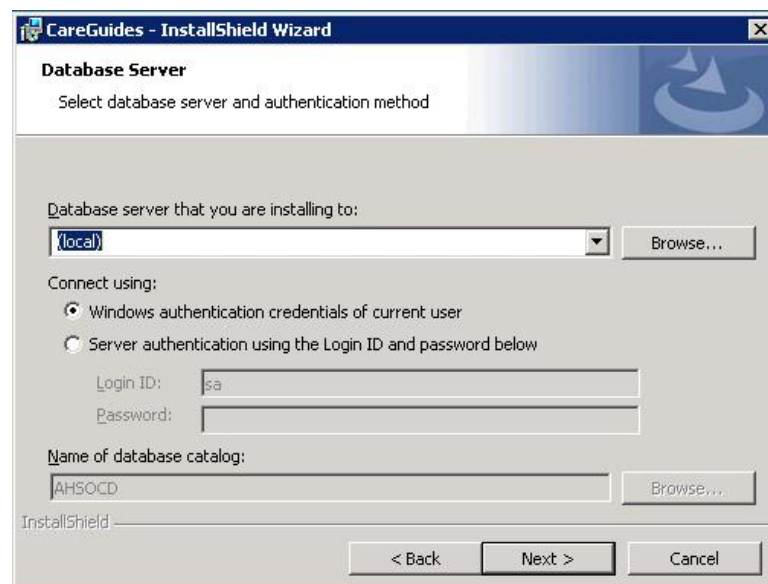


4. On this same screen, select the product(s) to be installed. The Orderable Concepts Dictionary (OCD) is required for all installations, and by default CareGuides are

selected as well. Confirm that the version information is appropriate and click **Next** to continue. *If CareGuides are selected, you will be prompted to confirm that the site is licensed for CareGuides before continuing.*

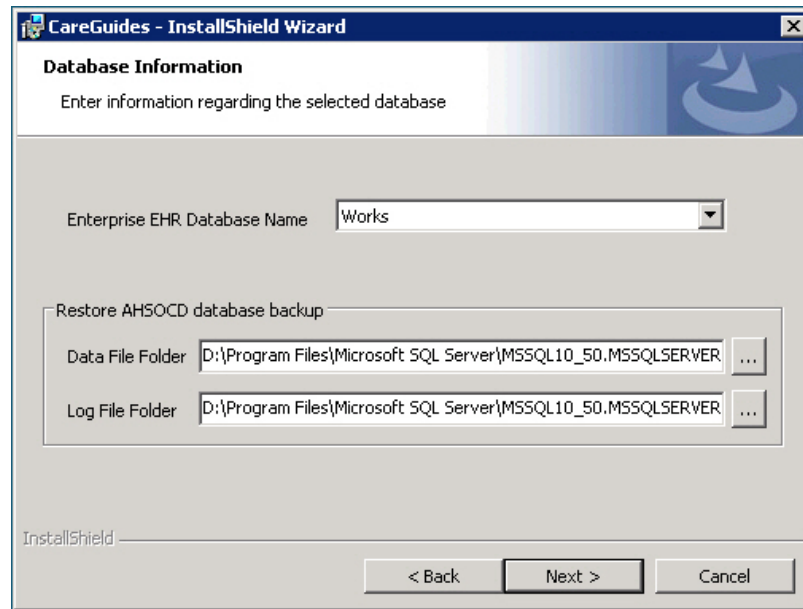


5. Enter the database server name and select the authentication method. If “Server authentication using the Login ID and password below” is selected, enter the SQL Server Login ID and Password. Note that for this installation, the ‘Name of database catalog’ field is set to AHSOCD and cannot be changed. Click the **Next** button to continue.

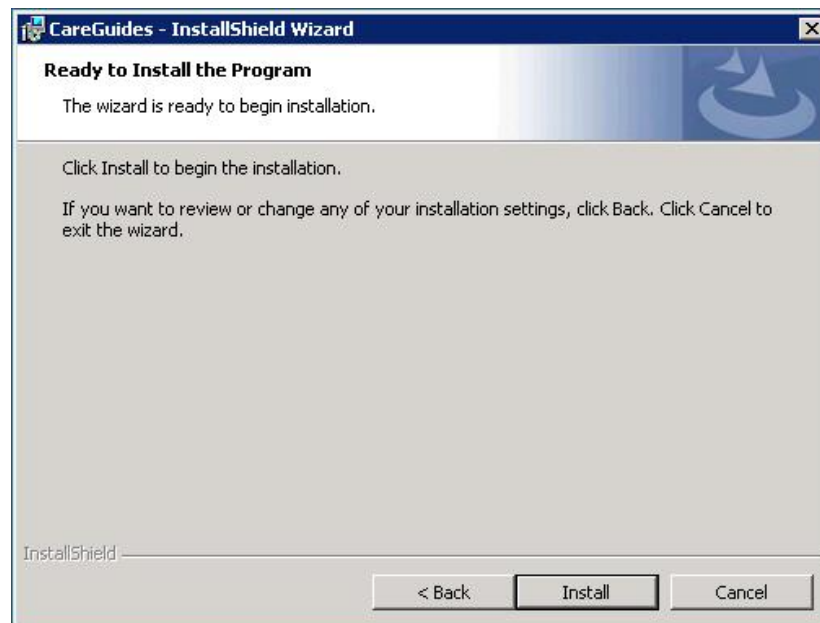


6. The installer will attempt to connect to your Allscripts TouchWorks EHR database using the information provided. If successful, the Database Information screen will be presented.

7. In the Enterprise/TouchWorks EHR Database Name field, **all** Clinical (Works) databases present on the target server will be listed. Select the database to which you are installing.
8. In the Restore AHSOCD database backup fields, select the desired location for the data and log files. By default, the locations for the existing AHSOCD (if any) on the target server are presented. When finished, select the **Next** button to continue.

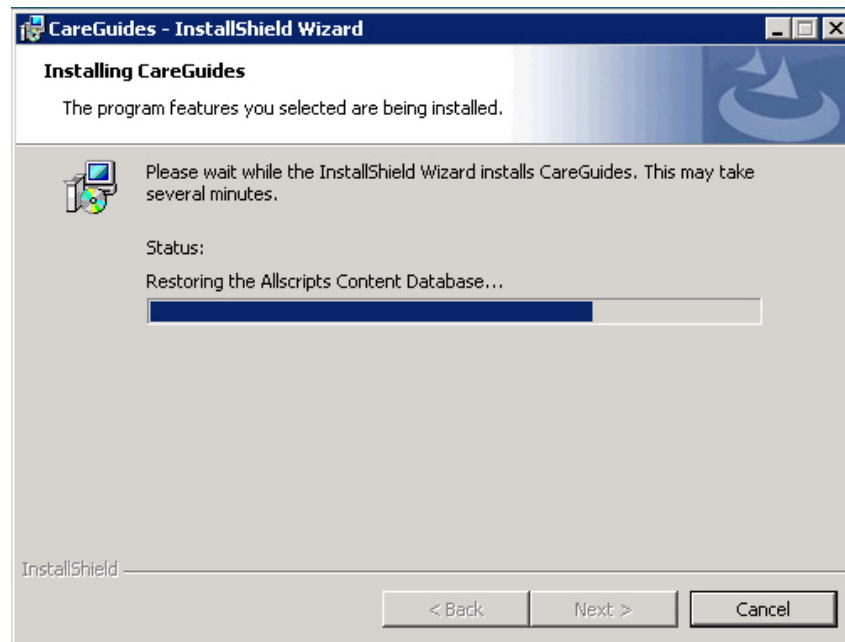


9. The installer will confirm the availability of sufficient disk space on the target folder(s) and present the Ready to Install the Program screen. Click **Next** to continue.

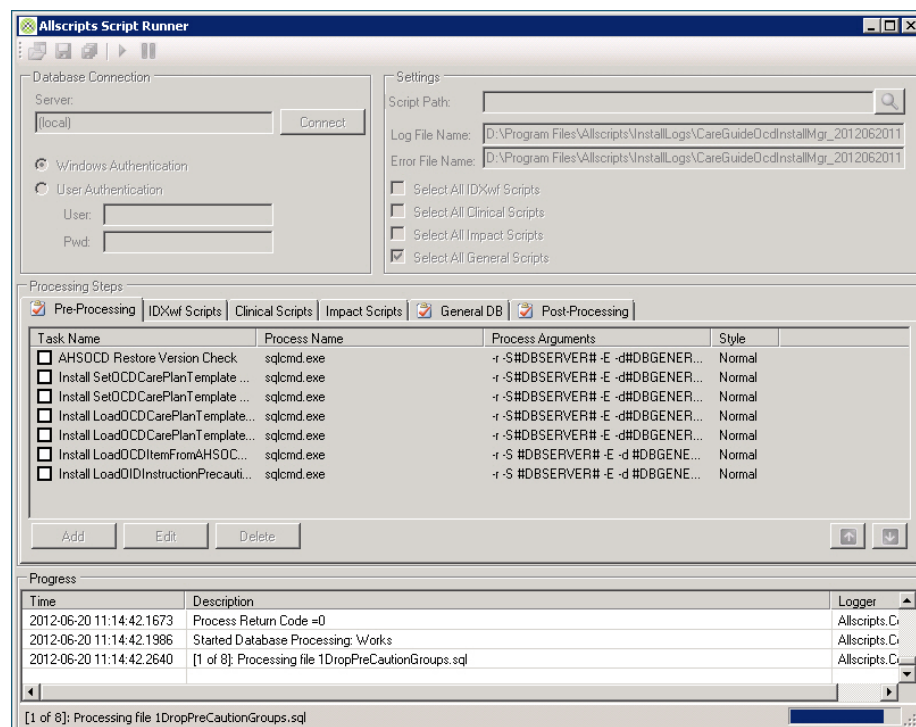




10. The Installing CareGuides progress screen will be displayed as files are copied and the AHSOCD database is restored.

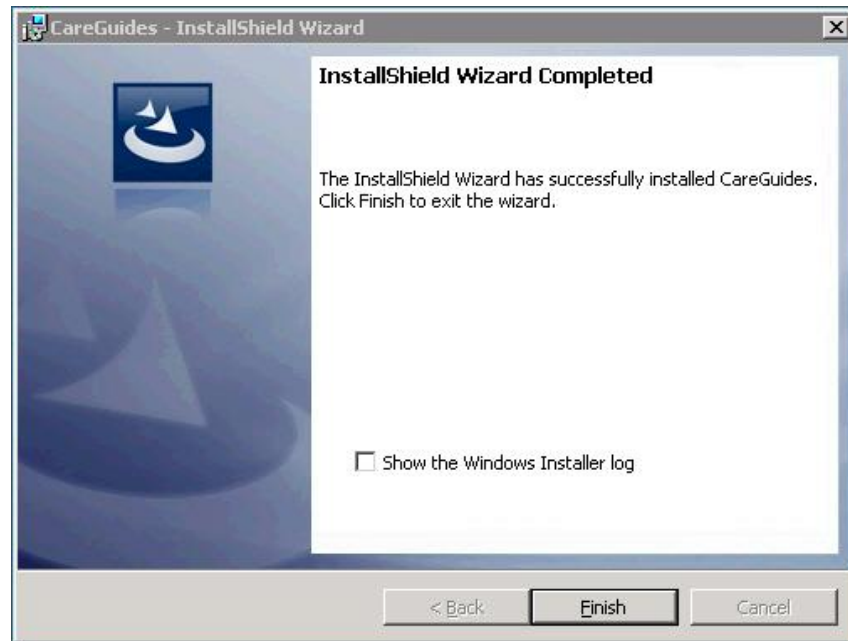


11. Once the AHSOCD database has been restored, the Allscripts Script Runner application is invoked. In this stage, a series of scripts are executed which install the OCD and CareGuides (if selected) to the target clinical database.



12. Once the database scripts have completed, control is returned to the installer application and a confirmation window is presented. Click **Finish** to exit the installer

application.



## End State

- The revised CareGuides now appear as the new "Allscripts" version of the CareGuide templates in the CareGuide Admin space.
- The "Enterprise" version and any Personal versions of the revised CareGuide templates are still active – they will not be overwritten in this process.
- Clinical Administrators should review the Allscripts delivered content prior to publishing any CareGuides.

## Appendix A: Using the CareGuide Release

For complete information on managing CareGuides, refer to the CareGuide Administrator's Guide which is available in the Product Documentation section of the Client Portal. A brief summary of next steps is provided here.

- To use a new Allscripts version of a CareGuide, right-click on the CareGuide and select "Save Allscripts as Enterprise". This will replace your current Enterprise version of this CareGuide with the revised Allscripts version of the CareGuide.
- If you edited the Enterprise version of a CareGuide, we recommend that you review the new Allscripts version before you publish it. Depending on the options you select, any edits that you made to the Enterprise CareGuide may be overwritten when you publish the Allscripts version of the same CareGuide.
- If your providers are currently using a CareGuide, and you want to edit the new version of the CareGuide, save the Allscripts version as Enterprise "Draft". This will create a draft Enterprise version of the CareGuide for you to edit without interrupting the use of the current version of the CareGuide actively being used by your providers. When you are finished making edits, choose Activate from the right-click menu to make the CareGuide available to your providers. This will replace the current Active version of the Enterprise CareGuide.
- If your providers are not currently using a CareGuide, and you want to edit the new version before releasing it for use, save the Allscripts version as Enterprise "Inactive". This will create an inactive Enterprise version of the CareGuide for you to edit. When you are finished, choose **Activate** from the right-click menu to make the CareGuide active and available to your providers.
- Publishing the new Allscripts version of a CareGuide to Enterprise will not, by default, replace the Personal versions of the same CareGuide. There is a separate action on the right-click menu that you can use to "force" the Enterprise version to publish over the Personal versions. We recommend that you notify your users before taking this step.