VistA Scheduling Enhancements (VSE)

VS GUI  
Installation Guide  
Version 2.0



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Revision History

| Date | Version | Description | Author |
| --- | --- | --- | --- |
| 04/11/2017 | 2.0 | Updated Section 1.4 and added Patch Information Table | VSE PMO |
| 02/09/2017 | 2.0 | Updated the SCCM Build Document Links | VSE PMO |
| 01/06/2017 | 2.0 | Incorporated VA feedback. | D. Vick E. Phelps |
| 12/22/2016 | 1.1 | Updated for VSE Additional Enhancements: Added patch numbers to section 1.5; replaced Figure 1 Log In Screen. Technical edit. | W. Gibbons E. Phelps |
| 05/04/2016 | 1.01 | Removed Manual Install Instruction.  Link to SCCM package was added.  All vista patches associated with this release have been documented in the guide, along with the installation order. | D. Reed |
| 05/01/2016 | 1.0 | Initial Baseline | D. Reed |

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# Getting Started

This section provides an overview of the VistA security keys, VistA server requirements, the client PC requirements and the process for acquiring the GUI software.

## General Information

It is recommended that the terminal output during the installation be captured using an auxport printer attached to the terminal at which software installation is being performed. This provides a printed audit trail if any problems should arise.

## VistA Server Requirements

* Cache version 5.0
* Kernel version 8
* Patient Information Management System (PIMS) version 5.3 patch 1012

## Client PC Requirements

* Microsoft Windows XP or Windows 7
* Microsoft .NET Framework 4.0
* Microsoft Data Access Components (MDAC) current version

## Installation Issues

There are no installation issues to report.  However, patches must be installed in this order **prior to installation of the GUI**:

GMRC\*3.0\*83   
SD\*5.3\*627    
SD\*5.3\*628   
SD\*5.3\*643   
SD\*5.3\*642   
SD\*5.3\*645   
GMRC\*3.0\*86  
SD\*5.3\*651  
SD\*5.3\*658

MBAA\*1\*4

Once Patch SD\*5.3\*628 is installed and the Post Install has started, please do the steps listed below:

* Stop/Terminate the Taskman job that is started by the Patch 628 Post Install
* Unschedule the daily Taskman job (SDEC REPORT DATA) that is scheduled by the Patch 628 Post Install
* Disable the option to manually start SDEC REPORT DATA.

**Production Release 1.1 Patch Information**

|  |  |  |  |
| --- | --- | --- | --- |
| Patch | Summary | Compliance Date | Additional concerns |
| [**GMRC\*3.0\*83**](http://vaww.oed.portal.va.gov/pm/iehr/vista_evolution/enhancements/Deployment/Forms/AllItems.aspx?RootFolder=%2Fpm%2Fiehr%2Fvista%5Fevolution%2Fenhancements%2FDeployment%2FFinal%20Documents%2FIG%20Documents) | Consult support fixes for VS GUI | May 5, 2017 | GMRC\*3.0\*83 MUST BE INSTALLED BEFORE SD\*5.3\*627. This patch should not be installed with users on the system and it is recommended that it be installed during non-peak hours  **Average Install Time at IOC sites:**  The installation time will vary from site to site depending on the size of file #123. The duration depends on several factors including the Operating System (VMS/Linux), Hardware Configuration and the number of records stored in REQUEST/CONSULTATION files (#123).  The team collected data from 24 sites and the median install time was 88 minutes**. Two sites reported install times over 50 hours however those sites had over 40 million records in File #123 and ran on VMS. If your site has a high number of records in File #123, runs on VMS and/or has a hardware configuration that shares resources with other instances it is recommended that these patches be installed during off-peak hours or over a weekend. During installation it is recommended that consults be disabled; however, it is not required.** |
| [**SD\*5.3\*627**](http://vaww.oed.portal.va.gov/pm/iehr/vista_evolution/enhancements/Deployment/Final%20Documents/IG%20Documents/SD_5.3_627%20VS%20GUI%20Initial%20Patch.docx) | Initial Patch for VS GUI (creating new files and pointers) | May 5, 2017 | **Issue 1:** A Post-Install error may occur if an appointment has been made that does not have a clinic defined.  **Recommendation:** The Query below should be run prior to install of patch 627.  User should set their terminal to be 132 characters wide.  Note that FileMan will return all of the appointment entries for a patient even if only 1 of them matches the search criteria.  When the search completes, if your site finds records where the CLINIC column shows the IEN (without a clinic name), Option #1 – IT needs to enter a clinic name – example MISSING CLINIC ‘IEN’  Option #2 – enter a CA Ticket  [Suggested Patch 627 Fileman Report](http://vaww.oed.portal.va.gov/pm/iehr/vista_evolution/enhancements/Deployment/Final%20Documents/IG%20Documents/Suggested%20Patch%20627%20Fileman%20Report.docx)    **Issue 2:**  When installing SD\*5.3\*627, the installer validates the integrity of the cross-references the application uses.  If the cross-reference is corrupt, missing or invalid for any reason, the install captures this information for output at the end of installation.  The output then can be used by the site to determine if they need to clean up their data.  At one site, the number of data issues caused the list to use up the entire RAM which is causing the installation process to crash.   Based on the error log, the team determined the “AB” cross-reference in File #200 may be the main culprit.  **Recommendation:**   recommend that the “AB” index of File #200 be re-indexed and the patch reinstalled to see if that solves the problem.  **Issue** **3:** An IOC site had a bad node in the Patient file causing the error. The DPT(4,”S” ) node is defined for a patient that has no DPT(4,0) node defined causing the error.  **Recommendation:** The IOC site killed bad global nodes in DPT and restarted the post-init routine. The error is coming from the Patient file, the node should killed if no other patient data is present. |
| [**SD\*5.3\*628**](http://vaww.oed.portal.va.gov/pm/iehr/vista_evolution/enhancements/Deployment/Final%20Documents/IG%20Documents/SD_5.3_628%20VS%20GUI%20Resource%20Mgmt.docx) | Initial Patch for VS GUI Reports | May 5, 2017 | **The Average Install Time of the patch is approximately 5 minutes or less**  **Once Patch SD\*5.3\*628 is installed and the Post Install has started, please do the steps listed below:**  **Stop/Terminate the Taskman job that is started by the Patch 628 Post Install**  **Unschedule the daily Taskman job (SDEC REPORT DATA) that is scheduled by the Patch 628 Post Install**  **Disable the option to manually start SDEC REPORT DATA.**  This patch contains server functionality to perform the following tasks:  1) Extract appointment and encounter data from VistA Scheduling.  2) Aggregate extracted data for a specified date range.  3) Format the aggregated data in a predefined XML schema.  4) Send the XML data to a requesting application through the RPC Broker. |
| [**SD\*5.3\*643**](http://vaww.oed.portal.va.gov/pm/iehr/vista_evolution/enhancements/Deployment/Final%20Documents/IG%20Documents/SD_5.3_643%20VSE%20Recall%20Reminder%20ENH.docx) | 5 Recall Reminder Enhancements | May 5, 2017 | **Pre-Install (a request has gone out to all MC (PAS ADPAC) to run this prior to release)-** Every site using Recall Reminder must validate that all of the clinics using the application are in the RECALL REMINDER LETTERS file (#403.52). It is recommended that this task be accomplished prior to installing SD\*5.3\*643 to eliminate any problems with adding Recall Reminders. A FileMan routine that will return a list of all Recall Reminder clinics that currently have pending Recall entries is attached.  [Patch SD\*643 Clarifaction](http://vaww.oed.portal.va.gov/pm/iehr/vista_evolution/enhancements/Deployment/Final%20Documents/IG%20Documents/Patch%20SD_643%20clarification.docx)    **Average Install Time at IOC sites:**  Install time should be 5 minutes or less.  \*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*  **PLEASE TAKE NOTE OF THE FOLLOWING KNOWN ISSUE**  After the install of SD\*5.3\*643, the following error may be produced when running ^%INDEX for Routine checks: SDEC \* \* 275 Lines, 18609 Bytes, Checksum: B119470269  CAP+1 F - Reference to routine '^SDEC58'. That isn't in this UCI.  This is due to a change in the load sequence of SD\*5.3\*643 and SD\*5.3\*642 where a routine reference to SDEC58 was left in SD\*5.3\*643. Since the RPC that uses this code is introduced in SD\*5.3\*642, it will not cause a functional error. After SD\*5.3\*643 has been installed, please proceed with the install of SD\*5.3\*642. After SD\*5.3\*642 has been loaded/installed, this error will no longer show in ^%XINDEX. |
| [**SD\*5.3\*642**](http://vaww.oed.portal.va.gov/pm/iehr/vista_evolution/enhancements/Deployment/Final%20Documents/IG%20Documents/SD_5.3_642%20VS%20GUI%20Release.docx) | 14 Additional VS GUI functionality | May 5, 2017 | **Average Install Time at IOC sites:**  There are 5 xrefs added, so install time could be 15-20 minutes. |
| [**SD\*5.3\*645**](http://vaww.oed.portal.va.gov/pm/iehr/vista_evolution/enhancements/Deployment/Final%20Documents/IG%20Documents/SD_5.3_645%20VS%20GUI%20-%20CID%20Preferred%20Date%20E.docx) | Changes Desired Date to CID/PREFERRED DATE in Scheduling | May 5, 2017 | **Average Install Time at IOC sites:**  Install time should be 5 minutes or less. |
| [**GMRC\*3.0\*86**](http://vaww.oed.portal.va.gov/pm/iehr/vista_evolution/enhancements/Deployment/Final%20Documents/IG%20Documents/GMRC_30_86%20Patch%20Description_v5.docx) | VS GUI CONSULT Processing Updates for Consults | May 5, 2017 | This installation will update routines that support VistA Scheduling GUI API's. **This patch should not be installed with VistA Scheduling GUI users on the system** and it is recommended that it be installed during non-peak hours to minimize potential disruption to other users.  **Average Install Time at IOC sites:**  The installation time for this patch will vary depending on the size of the REQUEST/CONSULTATION file (#123). Install time should be about the same as GMRC\*3.0\*83 above. |
| [**SD\*5.3\*651**](http://vaww.oed.portal.va.gov/pm/iehr/vista_evolution/enhancements/Deployment/Final%20Documents/IG%20Documents/SD_5.3_651%20VS%20GUI%20Post%20Warrenty%20Support.docx) | This patch contains 25 sustainment fixes for VS GUI | May 5, 2017 | **Average Install Time at IOC sites:**  Install time should be 5 minutes or less. |
| [**SD\*5.3\*658**](http://vaww.oed.portal.va.gov/pm/iehr/vista_evolution/enhancements/Deployment/Final%20Documents/IG%20Documents/sd_5.3_658v11.docx) | This patch contains 10 Enhancements and 35 bug fixes | May 5, 2017 | **Average Install Time at IOC sites:** Several comments, as follows:  a.      There are several new xrefs added, so patch install times can be up to an hour at a large site.  b.      The Taskman job that’s part of the Post Install can take up to 10 hours or more at a large site, based on experience with the Production installs during IOC.  A new PARAMETER DEFINITION (XPAR) added in Patch 658 called SDEC DEFAULT FONT SIZE which will hold the default Font. (Recommended default fault = 13)  Two new RPCs have been added –  - SDECU4 GETFONT allows the VS GUI to get the current default font size.  - SDECU4 PUTFONT allows the VS GUI to set a new default font size to the new XPAR. |
| [**MBBA\*1\*4**](http://vaww.oed.portal.va.gov/pm/iehr/vista_evolution/enhancements/Deployment/Final%20Documents/IG%20Documents/MBAA_1_4%20v1%20Patch%20Description.docx) | Enhancement Fixes for VAR Receiver | May 5, 2017 | **Average Install Time at IOC sites:**  Install time should be 5 minutes or less. |

## Software Download

The VS GUI will automatically be installed on the user’s PC via a push from the SCCM Administrator team.

SCCM Build Document:

Production Build Document: <http://vaww.eie.va.gov/SysDesign/CS/Shared%20Documents/Build%20Documents/Application%20Field%20Testing/ESE%20VA%20VistA%20Scheduling%20GUI_P%20Build%20Document.pdf>

Test Build Document: <http://vaww.eie.va.gov/SysDesign/CS/Shared%20Documents/Build%20Documents/Application%20Field%20Testing/ESE%20VA%20VistA%20Scheduling%20GUI_T%20Build%20Document.pdf>

## Security Keys

The VistA Scheduling (VS) Graphical User Interface (GUI) uses security keys to limit the user’s ability to change system set-up parameters and patient information.

**Note**: Not all VS GUI options are available to all users. Contact the site administrator to determine or change security keys.

All VistA users are required to observe the Department of Veterans Affairs (VA) Rules of Behavior regarding patient privacy and the security of both patient information and VA computers and networks.

Perform the following steps in VistA to configure the VS GUI security profile:

1. All Scheduling users must have the SDECZMENU security key.
2. Users who are Scheduling Managers must have the SDECZMGR key assigned. The SDECZMGR key permits access to the **Systems** tab in the VS GUI application. This menu supports the creation of clinic groups and assignment of Privileged Users to Prohibited clinics. See the *VS GUI User Manual* for detailed instructions.
3. Users who perform scheduling tasks and have the responsibility of managing the Veteran Appointment Request (VAR) mobile request will need the SDECZ REQUEST key assigned. The SDECZ REQUEST key permits access to the **Mobile Request** icon on the ribbon bar of the task tab. See the *VS GUI User Manual* for detailed instructions. ***Note: Do not assign the*** SDECZ REQUEST key ***in the VistA TEST environment.***
4. When setting up users in **VistA Menu XUSEREDIT**, users must have a **Default Division** defined, **Multiple Sign-on** must be set to **Allowed**, **Restrict Patient Selection** must be set to **NO**, and **CPRS GUI** **core** tabs must be defined in the **CPRS Access Tab**.
5. Make the **SDECRPC** menu options available to Scheduling users. These options must be somewhere in the user’s path, either as a secondary option or as members of a menu to which the user has access.

# Logging on to the VS GUI

Use the following steps to log on to the VS GUI, using the **VistA Scheduling** shortcut.

1. On the desktop, double-click the **VistA Scheduling - Shortcut** icon. The VS GUI application opens and the log in screen displays.

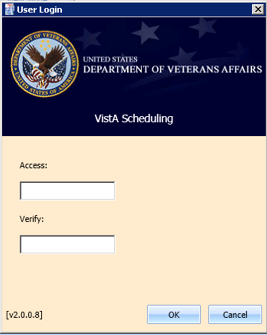


Figure 1: VistA Scheduling Log In Screen

1. Enter valid **Access** and **Verify** codes.
2. Click **OK** to complete logging in to the VS GUI.