

SmartLink™
Installation Guide – Mckesson/Allscripts

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NATIONAL RESEARCH
Corporation

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OVERVIEW

Welcome to the installation guide for OCS SmartLink for use with a McKesson or Allscripts database. This document will guide you through installing and configuring SmartLink step-by-step. The settings listed are the recommended settings as defined by OCS for the majority of installations. It is important that you read and follow these instructions *exactly*.

Before you begin installing, please have your system administrator or your designated technical personnel review the following information in order to properly setup SmartLink on your network.

NOTE: The process described herein does interact with your MIS system, specifically the MIS database. First, the tool runs read-only queries on your database to pull your data and create files for transfer. Second, the OCS-SmartLink Transfer service transmits files to OCS.

The service does not manipulate or change the data contained in the original database. The master record remains in your agency's MIS system. If you have any additional questions, please contact OCS Client Services at 866.641.8324, email ocsservice@nationalresearch.com

HARDWARE & SOFTWARE REQUIREMENTS

Hardware

- CPU -1.5 GHz or better
- 1 GB RAM Minimum (larger as needed)
- 40 GB hard drive (200MB free space)
- Integrated Intel 10/100MB NIC
- Broadband Internet such as cable or DSL required

Software

- Microsoft Windows 2000, 2003, XP, Vista, Windows 7, 8, or 8.1
- Microsoft .NET Framework version 3.5
- MSI Installer 3.1
- Microsoft Internet Explorer 6.0 or higher

IMPORTANT NOTES

- **This installation guide is for a standard installation on a local workstation or server. If you need additional guidance, please contact Client Services at 1.866.641.8324**
- SmartLink uses HIPAA-compliant data transfer methods which automatically compresses and encrypts the files prior to transfer
- SmartLink will upgrade your system to the .NET 3.5 Framework software components if it is not currently installed in the operating system (OS)
 - It will not affect previous versions of the .NET Framework and can be run concurrently
- In a few cases where MSI Installer is missing from your operating system it will be installed
- If .NET 3.5 or MSI Installer need to be installed by SmartLink a **reboot will be required**
- SmartLink must be installed by a domain user with administrative rights on the system to be installed and to the network location(s) where the data files are stored - **We highly recommend that a member of your technical staff perform the installation**

INSTALLATION INSTRUCTIONS

Pre-Installation Information

You must have the following information BEFORE you begin installation

System
<p>SmartLink will be installed on a: <input type="checkbox"/> Server <input type="checkbox"/> Workstation</p> <ul style="list-style-type: none"> Name of system (for your reference): <div style="margin-left: 40px;">NOTE: This should be a system which is rarely rebooted.</div>
Agency Identifiers
<ul style="list-style-type: none"> 7-digit unique ID (defined by OCS): _____ Medicare Provider Number(s) (M0010): _____
Proxy Firewall (if applicable)
<p>If data must pass through a proxy firewall please verify the following information:</p> <ul style="list-style-type: none"> Domain user account that has permission to pass through the firewall <div style="display: flex; justify-content: space-between; margin-left: 40px;"> Username: _____ Password: _____ </div> Domain name of the proxy server: Port number SmartLink should use to access the Internet: IP address of the proxy firewall server:
ODBC Connection
<p>Verify or create an ODBC Connection to your MIS vendor's database in which you agency enters assessments</p> <div style="display: flex; justify-content: space-between; margin-bottom: 10px;"> MIS Vendor: <u>Mckesson or Misys (aka Allscripts)</u> MIS Database Name: _____ </div> <ul style="list-style-type: none"> Sybase Server Name (where MIS database resides): _____
Domain Account setup to run the SmartLink Service
<div style="display: flex; justify-content: space-between; margin-bottom: 10px;"> Username: _____ Password: _____ </div> <p>Verify or create a domain user account with these characteristics:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Configured to run as a service <input type="checkbox"/> Password that never expires <input type="checkbox"/> Access to the internet <input type="checkbox"/> Read Only access to the SQL Database (above) <input type="checkbox"/> NT Authentication to the SQL server (above)
SmartLink Error Email Notification (optional)
<p>This section is optional if you want to be notified by email if issues arise</p> <ul style="list-style-type: none"> SMTP Mail Server Name or IP Address: _____ Email address of Agency Technical Contact: _____

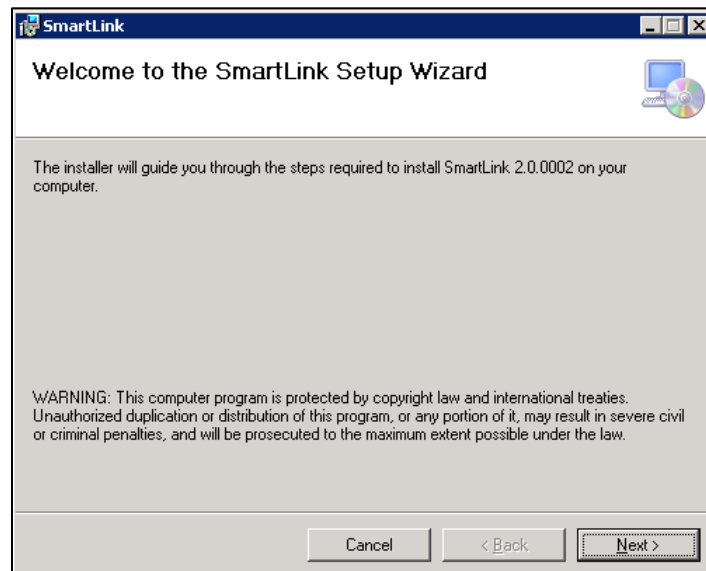
Questions: Please contact OCS Client Services at 866.641.8324, email ocsservice@nationalresearch.com

Installation Step-by-Step:

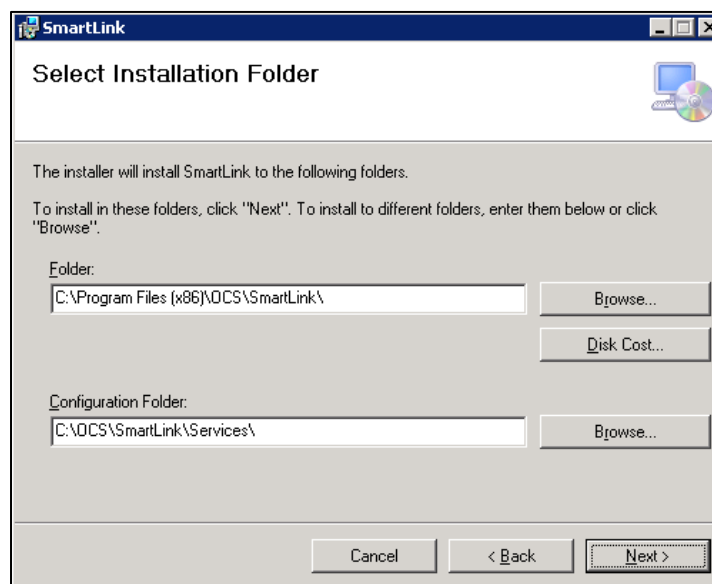
1. Contact OCS Client Services at 866.641.8324, email ocsservice@nationalresearch.com to find out where to download the software

NOTE: This file will be in .zip format

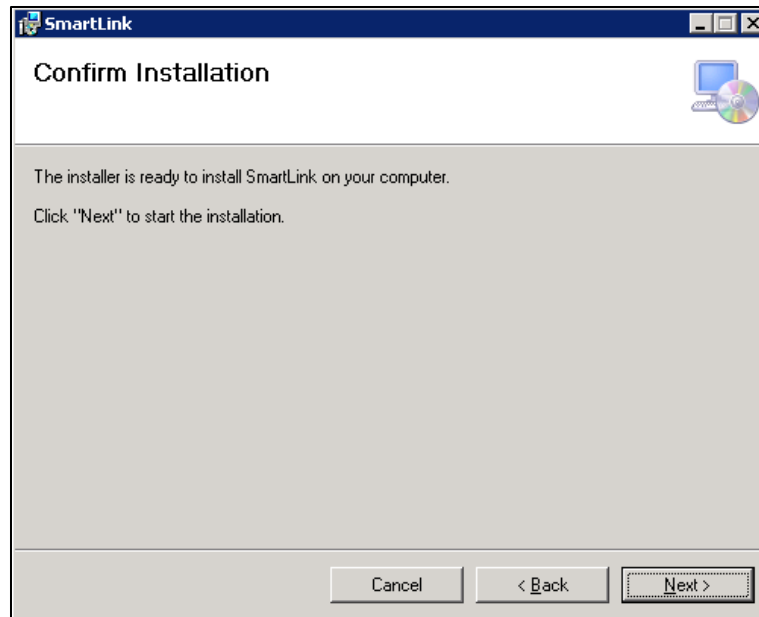
2. Extract the zip file onto the desktop of the system to be installed (must be on a local drive)
3. Launch the installation by double-clicking **OCS.SmartLink.msi**
4. The Start Installation screen will appear, click [**Next**] to begin



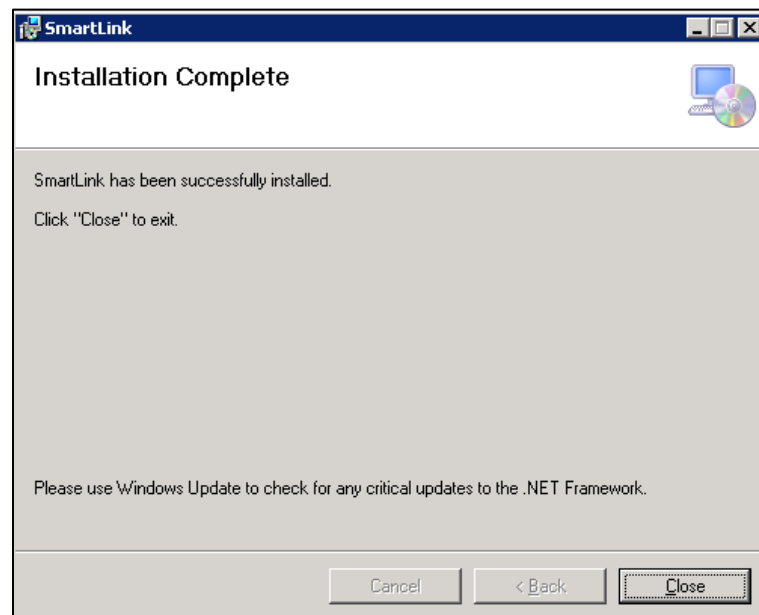
5. Select your Installation Folder – The first folder is the location of the program and the second folder is the location of your configuration files – Click [**Next**] to continue



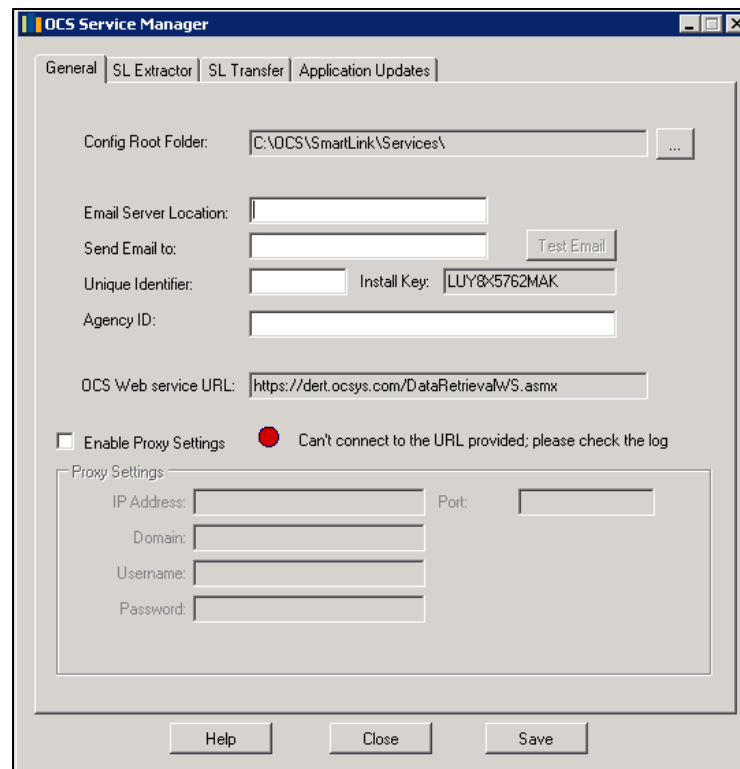
6. Confirm the installation of SmartLink by clicking [**Next**]



7. The installation is now complete – click **[Close]**



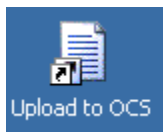
8. The installation wizard will close and the OCS Service Manager window will open automatically. Now we are ready to continue on to Configuration.



The screenshot shows the 'OCS Service Manager' application window. It has a tabbed interface with 'General', 'SL Extractor', 'SL Transfer', and 'Application Updates'. The 'General' tab is active. It contains several configuration fields: 'Config Root Folder' (set to 'C:\OCS\SmartLink\Services\'), 'Email Server Location' (empty), 'Send Email to:' (empty) with a 'Test Email' button, 'Unique Identifier' (empty), 'Install Key' (set to 'LUY8X5762MAK'), 'Agency ID' (empty), and 'OCS Web service URL' (set to 'https://dert.ocsys.com/DataRetrievalWS.asmx'). There is a checkbox for 'Enable Proxy Settings' which is unchecked. Below it, a red circle icon is next to the text 'Can't connect to the URL provided; please check the log'. A 'Proxy Settings' section is collapsed, showing fields for 'IP Address', 'Port', 'Domain', 'Username', and 'Password'. At the bottom are 'Help', 'Close', and 'Save' buttons.

CONFIGURATION INSTRUCTIONS

Upon completing your installation, you will find two new folders on your desktop.



Any file placed in your Upload folder will automatically be submitted to OCS via a secure web service mechanism.



Use the OCS SmartLink Service Manager to modify the configuration settings that you selected during installation.

There are FOUR main steps in configuration:

1. SmartLink General Settings Configuration in OCS Service Manager
2. SmartLink Extractor Settings Configuration in OCS Service Manager
3. SmartLink Transfer Settings Configuration in OCS Service Manager
4. SmartLink Service Configuration in Windows Computer Management

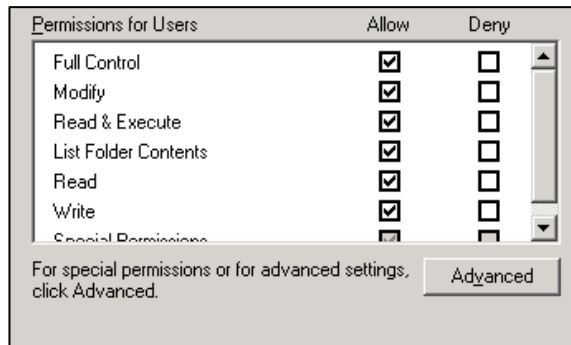
Before moving on to Configuration

You will need the domain user account name and password for the account that will be running the services. This account must be setup with the following:

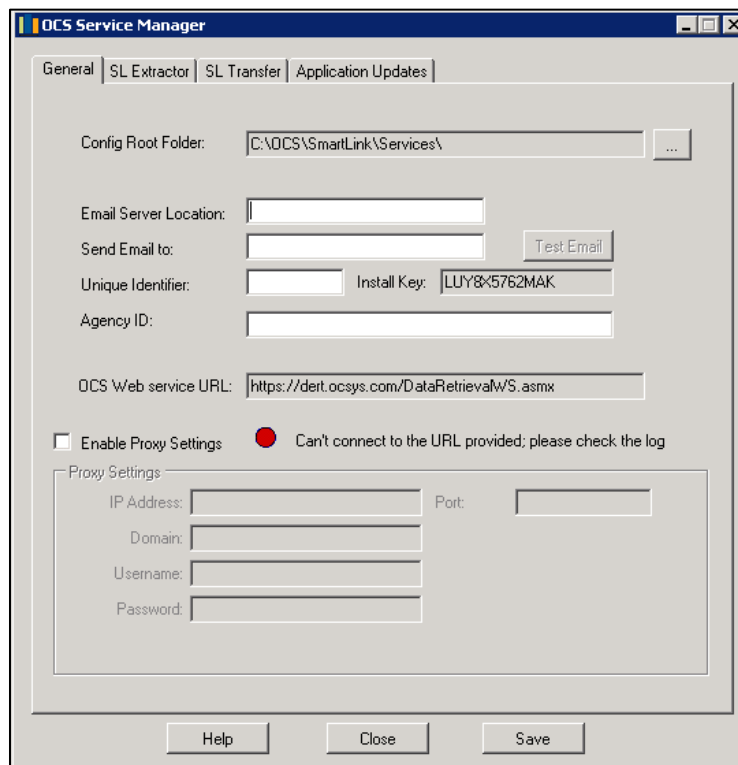
- Configured to run as a service
- Password that never expires
- Access to the internet

SmartLink Installation Guide - Cerner

- Must have full control to the C:\OCS and C:\Program Files\OCS (Or alternate installation directories that you defined in step 5)
 - Verify by right-clicking on these directories, selecting properties, and going to the Security tab. Highlight the domain account you have setup from the user list (or add the domain account here) and make sure the permissions are as follows:



SmartLink General Settings Configuration



You will need to edit the following fields:

**Email Server
Location**
(optional)

The name or IP address of your SMTP mail server so SmartLink can send notification emails if there is a problem (optional but recommended)

SmartLink Installation Guide - Cerner

Send Email to (optional)	The email address of the person at your agency who should receive the notification email if there is a problem (optional but recommended)
Unique Identifier	7-digit alpha numerical code unique to your agency as defined by OCS
Agency ID	6-digit Medicare Provider ID (M0010)

Proxy Settings

SmartLink will automatically try to access the internet via port 443. If port 443 traffic is restricted by a Proxy Firewall on your network, you will need to check **[Enable Proxy Settings]**.

The screenshot shows the 'OCS Service Manager' window with the 'General' tab selected. The 'Config Root Folder' is set to 'C:\OCS\SmartLink\Services\'. The 'Email Server Location' is empty. The 'Send Email to' field is empty, with a 'Test Email' button next to it. The 'Unique Identifier' is empty, and the 'Install Key' is 'LUY8X5762MAK'. The 'Agency ID' is empty. The 'OCS Web service URL' is 'https://dert.ocsys.com/DataRetrieval/WS.asmx'. The 'Enable Proxy Settings' checkbox is checked, and a red error icon with the text 'Can't connect to the URL provided; please check the log' is visible. Below this, the 'Proxy Settings' section is expanded, showing fields for 'IP Address', 'Port', 'Domain', 'Username', and 'Password', all of which are currently empty. At the bottom of the window are 'Help', 'Close', and 'Save' buttons.

You will need to edit the following fields to configure the proxy settings:

IP Address	The name or IP address of your proxy server
Port	The port SmartLink should use to pass through your firewall and access the internet
Domain	The domain your proxy resides on
Username	The username SmartLink should use to pass through your firewall and access the internet
Password	The password SmartLink should use to pass through your firewall and access the internet

NOTE: If you are unsure of your proxy settings, contact your network administrator

SmartLink Extractor Settings Configuration

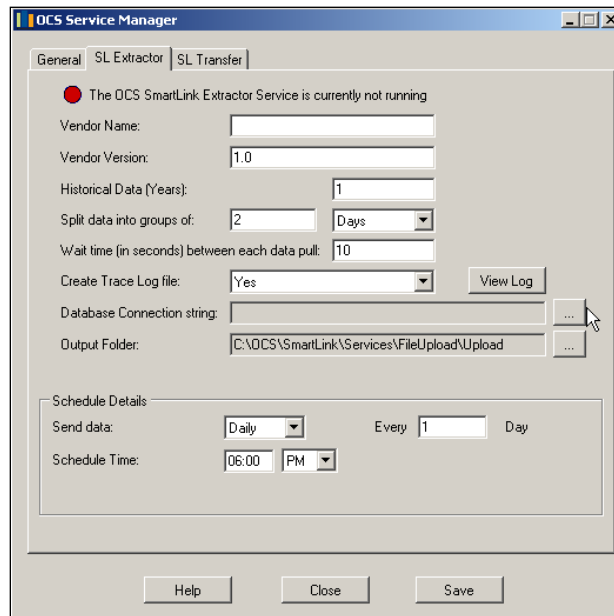
The screenshot shows the 'OCS Service Manager' window with the 'SL Extractor' tab selected. The 'General' sub-tab is active. At the top, there is a checkbox labeled 'Activate SmartLink Extractor Service' which is checked. Below this, a green status indicator and text state 'The OCS SmartLink Extractor Service is currently Running', with 'Stop' and 'Restart' buttons to the right. The configuration fields include: 'Vendor Name' (empty text box), 'Vendor Version' (text box with '1.0'), 'Historical Data (months)' (text box with '12'), 'Split data into groups of:' (text box with '1' and a dropdown menu set to 'Days'), 'Wait time (in seconds) between each data pull:' (text box with '10'), 'Create Trace Log file:' (dropdown menu set to 'Yes' with a 'View Log' button), 'Database Connection string:' (text box with an empty field and an ellipsis button), and 'Output Folder:' (text box with 'C:\OCS\SmartLink\Services\FileUpload\Upload' and an ellipsis button). A 'Schedule Details' section contains 'Send data:' (dropdown set to 'Daily'), 'Every' (text box with '1') 'Day', and 'Schedule Time:' (text box with '06:00' and a dropdown set to 'PM'). At the bottom are 'Help', 'Close', and 'Save' buttons.

Activate the SmartLink Extractor Service by checking the box at the top. You can now configure your SmartLink Extractor Service.

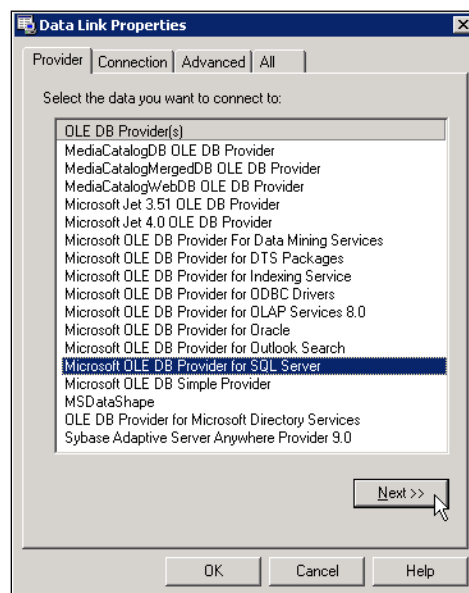
You will need to edit the following fields:

Vendor Name	Enter Misys or Mckesson (case sensitive)
Vendor Version	1.0
Historical Data (months)	Defaulted to 12 months – if you want to send less data, specify the number of months (from ‘today’s date’ you wish to send to OCS)
Database Connection String	See Page 12 for detailed Instructions
Schedule Details	Schedule Time – Enter a time after business hours for your agency when data extraction will not interfere with other processes. We recommend choosing a time between 7 and 9 PM .

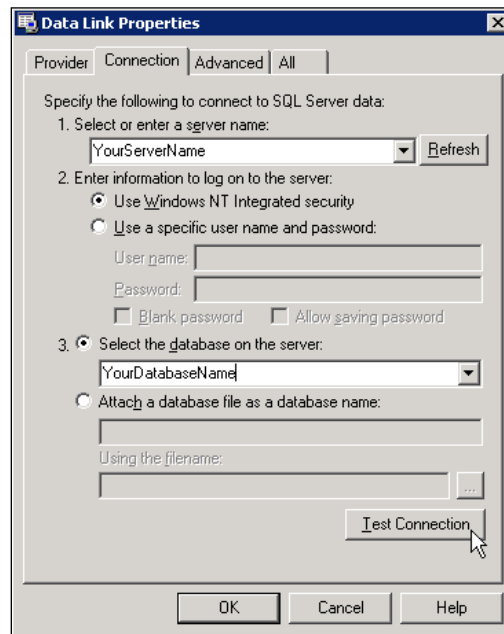
1. Click on the ellipsis [...] to continue



2. The Data Link Properties screen will appear. On the Provider tab, select Microsoft OLE DB Provider for SQL Server and click **[Next]**



3. On the Connection tab, enter the SQL database connection information.



Select or enter a server name

Enter the name of the SQL server your MIS database is on

Enter information to log on to the server

Select one of two authentication methods:

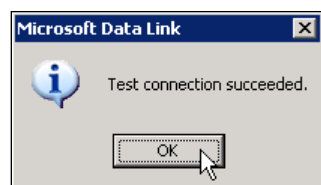
- 'Use Windows NT Integrated security' (recommended)
- 'Use a specific user name and password' and enter the SQL user account with access to the MIS database

Select the database on the server

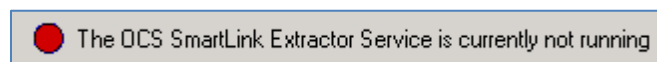
Enter the name of your MIS SQL database

4. Click on **[Test Connection]**

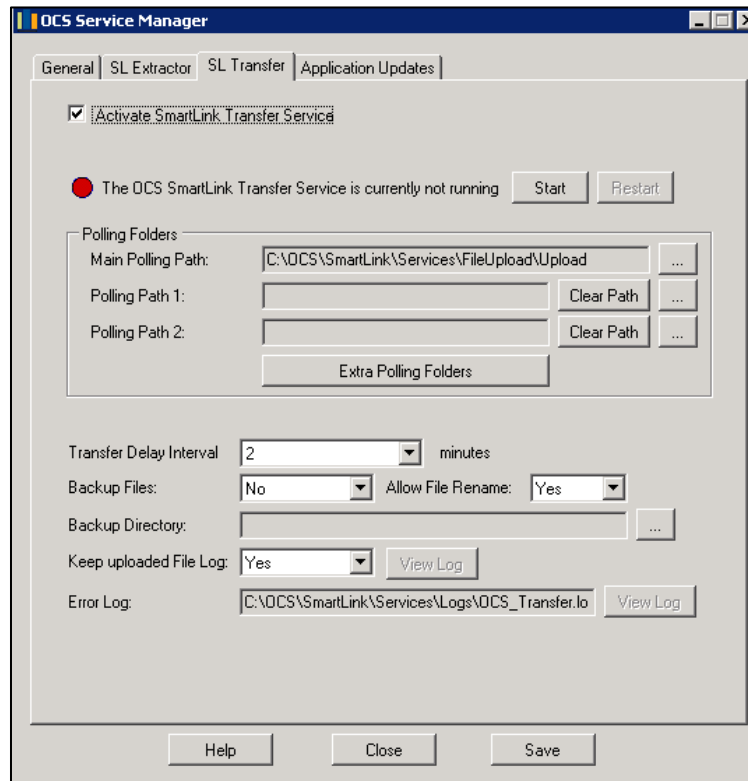
5. The Test connection succeeded message should pop-up. Click **[OK]**



The Extractor Settings tab may still show a message that the SmartLink Extractor Service is currently not running. That is expected at this point. We will now continue on to the SmartLink Transfer Settings configuration.



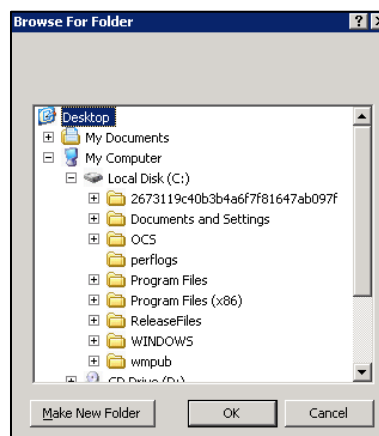
SmartLink Transfer Settings Configuration



Activate the SmartLink Transfer Service by checking the box at the top. You can now configure your SmartLink Transfer Service.

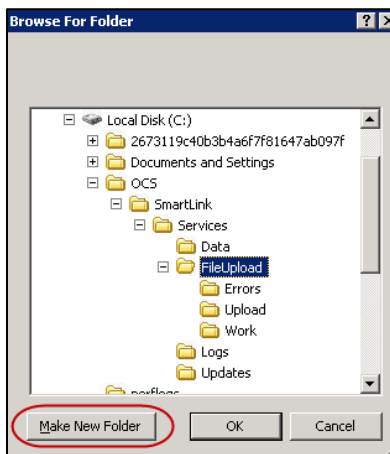
If you would like to keep a backup of the files that are transmitted to OCS (optional), complete steps 1 through 5. If you prefer not to keep a backup of the transmitted files, skip to step 6.

1. Under **Backup Files** select the dropdown menu and select **Yes**
2. Select the [...] button next to **Backup Directory**
3. The Browse For Folder window will open

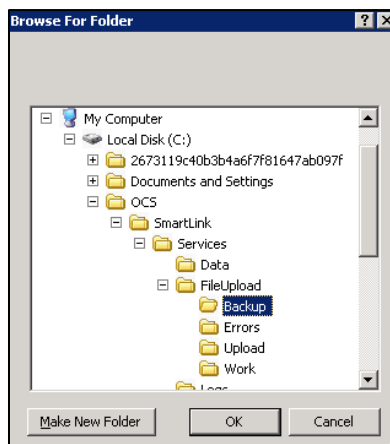


4. We recommend that you create a new folder called **Backup** in your C:\OCS\SmartLink\Services\FileUpload directory

1. Click on the + next to 'My Computer'
2. Click on the + next to 'Local Disk (C:)'
3. Click on the + next to 'OCS'
4. Click on the + next to 'SmartLink'
5. Click on the + next to 'Services'
6. Click on 'FileUpload' to highlight it and then click on **[Make New Folder]**



7. Create a folder named **Backup** and click **[OK]**



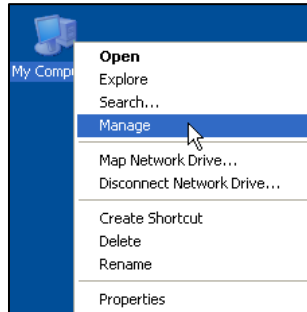
5. You will find yourself back on the SL Transfer tab and notice that the **Backup Directory** field is now filled in
6. Now click **[Save]**. You should receive a message that settings have been successfully saved. You can **[Close]** the OCS Service Manager at this point.

NOTE: If you get an error message when trying to save, please contact OCS Client Services at 866.641.8324, email ocsservice@nationalresearch.com

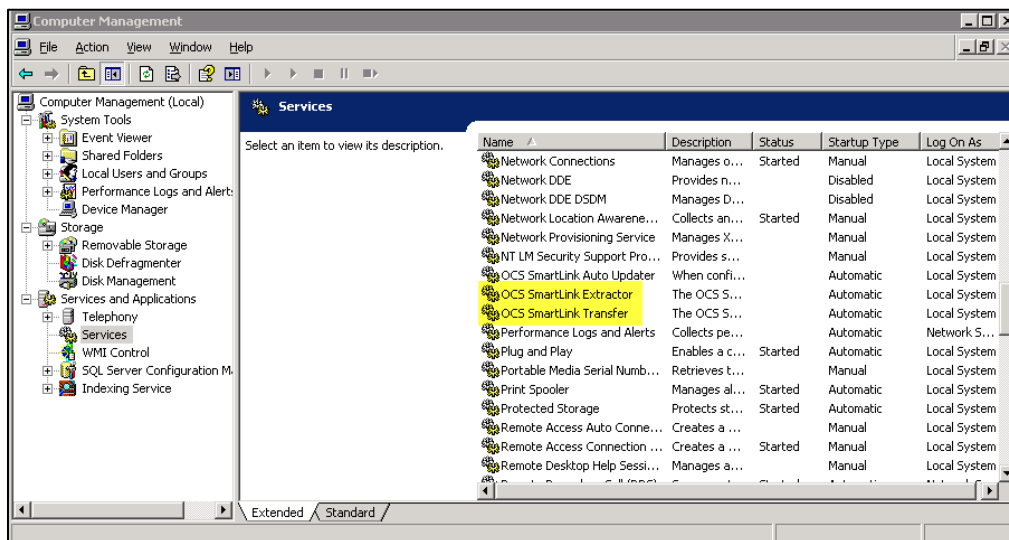
SmartLink Service Configuration in Windows Computer Management

Now we will work to make sure SmartLink is configured properly to allow the services to run

1. Right-click on **My Computer** on the desktop and select **[Manage]**

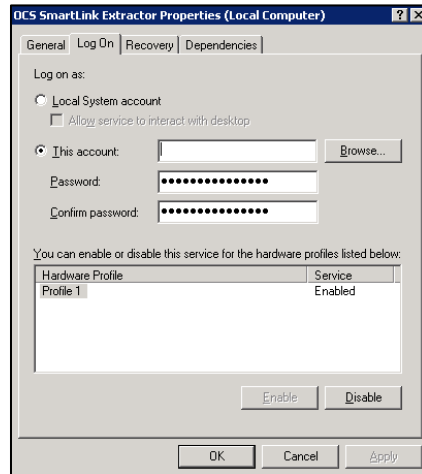


2. The **Computer Management** window will open. Go to **Services and Applications** and select **Services**. You will see the OCS SmartLink Extractor and OCS SmartLink Transfer services in the list on the right.

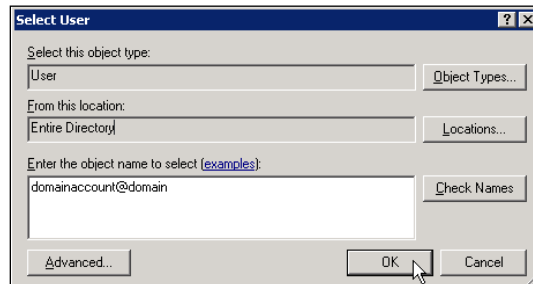


For both services complete steps 3 through 8:

3. Double-click on the service. The Properties window will open. Go to the **Log On** tab. Select 'This account' and click the **[Browse]** button

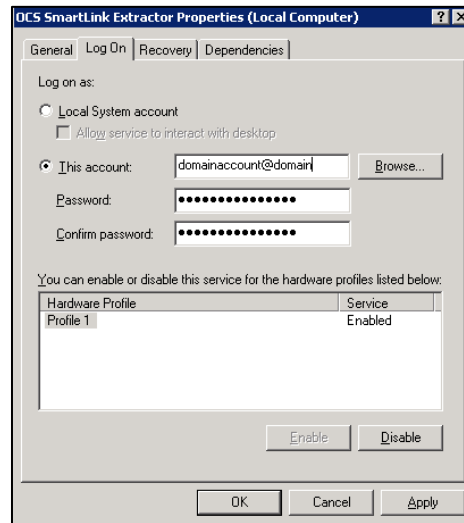


4. The Select User window will open. Make sure **[Locations...]** is set to Entire Directory. Enter the object name (domain name) and click **[Check Names]**. The name should say something like "domainaccount@domain". Click **[OK]**

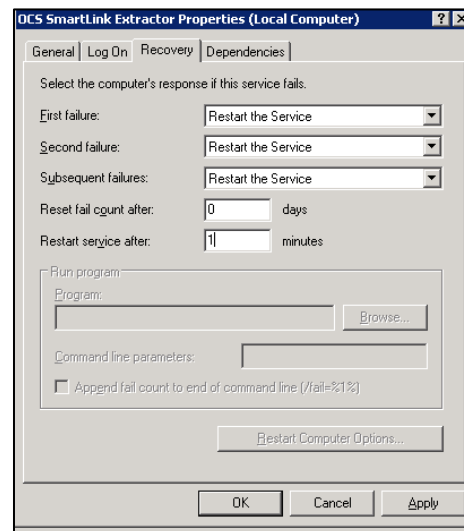


NOTE: If you get an error message when you click Check Names, make sure the Location is set as Entire Directory. Consult your Network Administrator if the domain account is still not recognized.

5. Back on the service Properties screen, enter and confirm the password for the domain user account.

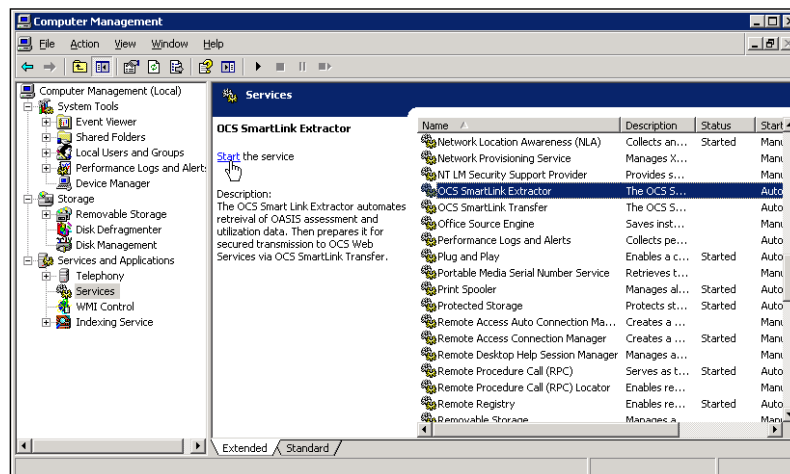


6. Go to the **Recovery** tab and select 'Restart the Service' as the failure response in all three drop-down boxes. Click [OK]



- You may get a message that the user account has been granted the Log on as Service permission. If so, click [OK]
- You may also get a message that the new logon name will not take effect until you stop and restart the service. If so, click [OK]

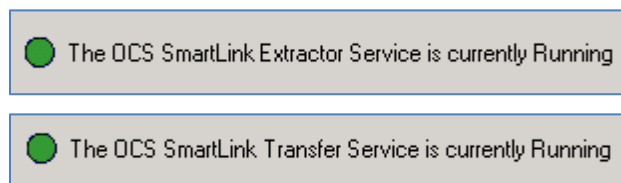
- On the Computer Management window, make sure the service is highlighted in the list and click on the **[Start]** button



- If the service successfully starts, the Status column on the Computer Management window will say 'Started'.

NOTE: If you receive any error messages, make sure the domain account information is correct and that the domain account has full read/write permissions to C:\OCS and C:\Program Files\OCS. Consult your Network Administrator to make sure permissions are correct. For further assistance, please contact OCS Client Services at 866.641.8324, email ocsservice@nationalresearch.com

- Complete steps 3 through 8 for both OCS SmartLink services and then open the OCS Service Manager on the desktop.
- Verify that the SmartLink Extractor and SmartLink Transfer services are both running per the OCS Service Manager.



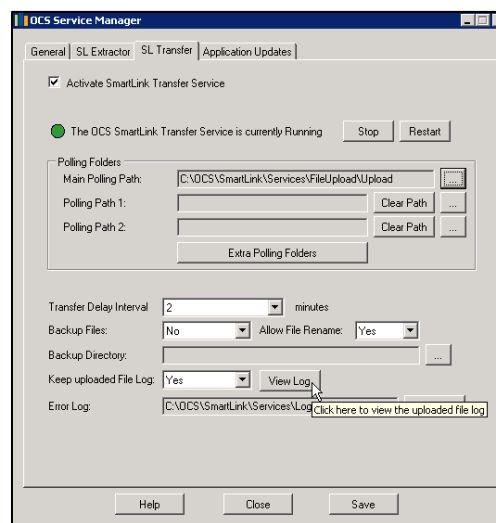
NOTE: If one or both of the services are not running, please close the OCS Service Manager. You should receive a message stating that the services are not running and asking if you would like to start them. Click **[Yes]**. Then re-open the OCS Service Manager on the desktop to verify the services are now running. If you are unable to start the services, please contact OCS Client Services at 866.641.8324, email ocsservice@nationalresearch.com for further troubleshooting assistance.

- You can **[Close]** the OCS Service Manager at this point.

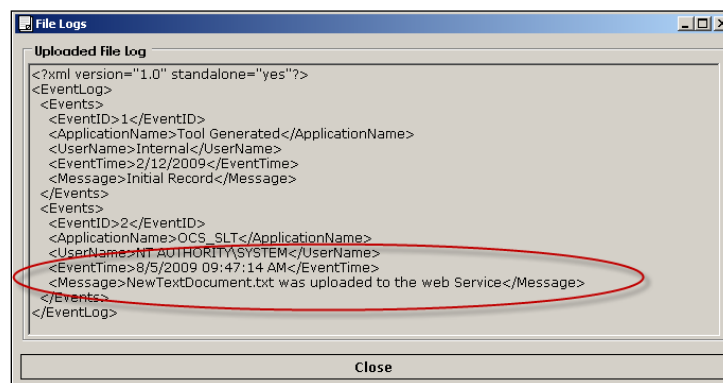
TEST UPLOAD INSTRUCTIONS

Once you have completed installing and configuring SmartLink, it is important to make sure SmartLink is working properly.

1. Create a new text file in the Upload folder on the desktop (the file name is not important)
2. Open the text file & type in some characters so that the file size is greater than 0kb
3. Save the file & watch the Upload folder, the file should disappear in 2-5 minutes
4. In OCS Service Manager on the SL Transfer tab, click on the **[View Log]** button next to **Keep uploaded File Log**



5. At the end of the log, look for the message stating that the file was uploaded today



6. The installation and configuration of SmartLink for your agency is now complete! Contact OCS Client Services by phone 866.641.8324, or email ocsservice@nationalresearch.com to perform a test upload and activate your reports.