Preparing Your Network for an MDsuite Installation
**Introduction**

This document is intended for those clients who have purchased the MDsuite Application Server software and will be scheduled for an MDsuite installation appointment. The steps in this document are to ensure that you have the smoothest possible installation and implementation.

It is the responsibility of the client to ensure that:

- All system requirements for servers and workstations that will be running MDsuite are met.
- A supported operating system is installed on all workstations and servers that will be running MDsuite. Refer to the MDsuite System Requirements section for more info.
- Networking is configured correctly and all workstations and servers to be used with MDsuite can communicate with one another.
- IIS is installed on the application server. A supported version of Microsoft SQL Server is installed on the application or data server.
- The application server(s) does not have any conflicting software installed on it that could cause problems with MDsuite, such as Microsoft Exchange, Share Point, and any other applications that use IIS.
- The Microsoft .NET Framework 3.5 and Internet Explorer 8.0 or greater is deployed on all workstations that will be using MDsuite.

An MDsuite installation appointment cannot be made until all system requirements have been met, all prerequisite software has been installed, conflicting software has been completely uninstalled from target workstations and servers and the deployment checklist, workstation information and server information forms have been filled out and returned to us.

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Deployment Checklist

**Prerequisites – Application Server**

- 1. Application server meets minimum system requirements.
- 2. Supported operating system installed on the application server.
- 4. Microsoft Internet Information Services installed on the application server.

**Prerequisites - Workstations**

- 1. All workstations meet minimum system requirements.
- 2. The .Net Framework 3.5 has been installed on all workstations.
- 3. Internet Explorer 8.0 or greater is installed on all workstations.
- 4. For EHR clients, Adobe Flash and Acrobat reader are installed on all workstations.

**Application / Database Server Installation**

- 1. Installed Internet Information Services (IIS).
- 2. Installed a supported edition of Microsoft SQL Server using “Mixed Mode” authentication.
- 3. If SQL Server 2008 (any edition) or SQL Server 2012 (any edition) was deployed, installed the SQL Server 2005 Backward Compatibility Components.

**Post Deployment**

- 1. Complete this checklist and the attached Server/Workstation forms and fax to: (858)486-5493
- 2. Reviewed Post Deployment section.

Print Name: _____________________ Title: _____________________

Signature: _____________________ Date: _____________________
MDsuite System Requirements

System requirements are subject to change. For the latest system requirement information, please visit the MDsuite website at http://www.mdsuite.com/resources/system_requirements.

Deployment Guide

This section will guide you through the installation of the MDsuite prerequisite components.

Step 1: Installing Internet Information Services (IIS)

The MDsuite software depends on Internet Information Services to function correctly. Installation of IIS is the first step in preparing your new server. Follow the below steps to deploy IIS onto your server, using the procedures that correspond to the version of the Windows operating system you are running.

Windows Server 2012

1. Click on Start button and choose Server Manager and single click to launch.
2. The Server Manager dialog appears. From the list on the left, highlight Dashboard.
3. In the right pane, under Quick Start click Add roles and features.
4. The Add Roles and Features Wizard dialog appears. Click Next under Before You Begin. Under Installation Type, select Role-based or feature-based installation and click Next. Under Server Selection, select the current server and click Next.
5. Under Server Roles, choose the following from the list of available roles and then click Next:
   - Web Server (IIS)
     - Common HTTP Features
       - Default Document
       - Directory Browsing
       - HTTP Errors
       - Static Content
       - WebDAV Publishing
     - Health and Diagnostics
       - HTTP Logging
       - Logging Tools
       - ODBC Logging
       - Request Monitor
       - Tracing
     - Performance
       - Static Content Compression
       - Dynamic Content Compression
     - Security
       - Request Filtering
       - URL Authorization
       - Windows Authentication
     - Application Development
       - .NET Extensibility 3.5
       - ASP
       - ASP.NET 3.5
       - ISAPI Extensions
       - ISAPI Filters
       - Server Side Includes
Management Tools

- IIS Management Console
- IIS 6 Management Compatibility
  - IIS 6 Metabase Compatibility
  - IIS 6 Management Console

6. Under **Features**, choose the following from the list of available roles and then click **Next**:  
   - .NET Framework 3.5 Features
     - .NET Framework 3.5
   - SMTP Server

7. Click **Install** to continue with the installation of the server roles and features. Click **Close** once the installation completes.

**Windows Server 2008**

1. Click on the **Start** button and choose **Control Panel**. When the Control Panel appears, choose **Administrative Tools**.
2. In the Administrative Tools section, locate **Server Manager** and double click to launch.
3. The **Server Manager** dialog appears. From the list on the left, highlight **Roles**.
4. In the right pane, under **Roles Summary** click **Add Roles**.
5. The **Add Roles Wizard** dialog appears. In the list of available roles, check the box next to **Web Server (IIS)**. Click **Next**.
6. The **Select Server Roles** dialog appears. From the list of available roles, click the checkbox next to **Web Server (IIS)**. Click **Next**.
7. The **Web Server (IIS)** dialog appears with information about IIS 7.0. Click **Next**.
8. The **Select Role Services** dialog appears. From the list of available **Role services**, select the following services and then click **Next**:
   - Static Content
   - WebDAV Publishing*
   - Default Content
   - Directory Browsing
   - HTTP Errors
   - ASP.NET
   - .NET Extensibility
   - ASP
   - ISAPI Extensions
   - ISAPI Filters
   - Server Side Includes
   - HTTP Logging
   - Logging Tools
   - Request Monitor
   - Tracing
   - Windows Authentication
   - URL Authorization
   - Request Filtering
   - Static Content Compression
   - Dynamic Content Compression
   - IIS Management Console
   - IIS Management Scripts and Tools
   - Management Service
   - IIS 6 Management Compatibility

9. The **Confirm Installation Selections** dialog appears. Review your selections and verify that the selections shown match the list in Step 8. Click **Install** to proceed.
10. The wizard will install role and services as specified. You may be prompted to reboot the server at the end of the process. If so, reboot the server before continuing to the next step.

11. Click on the Start button and choose Control Panel. When the Control Panel appears, choose Administrative Tools.

12. In the Administrative Tools section, locate Server Manager and double click to launch.

13. The Server Manager dialog appears. From the list on the left, click on Features and then click the Add Features button in the right pane.

14. The Add Features Wizard appears. From the list of available features, locate SMTP Server, .NET Framework 3.5.1 Features and check the boxes for each one.

15. A dialog may appear asking to install additional required features. Click Add Required Features if it does and click Next.

16. Click Install to continue with the installation of the SMTP Server Service. Click Close once the installation completes.

* Please note, if you are using the non R2 version of Windows 2008 Server, you will need to install and enable the WebDAV extensions for Internet Information Services (IIS). Refer to: http://learn.iis.net/page.aspx/350/installing-and-configuring-webday-on-iis-7/ for information on how to do this.

### Windows 2003 Server

1. Click on Start, select Control Panel, and choose Add or Remove Programs.
2. Double-click on Add/Remove Windows Components.
3. The Windows Components Wizard dialog appears. Highlight the Application Server entry and click Details.
4. The Application Server dialog appears. Highlight Internet Information Services (IIS) and click Details.
5. Select only Common Files, Internet Information Services Manager, SMTP Service, and World Wide Web Service. Do not check any other boxes.
6. Click OK to close the Internet Information Services (IIS) dialog.
7. Click OK to close the Application Server dialog.
8. Click Next to proceed with installation. Insert your Windows 2003 Server installation media if prompted.
9. When the install is complete, click Finish.

### Windows 7:

1. Click on Start and then select Control Panel.
2. When the Control Panel appears, double click on Programs and Features.
3. The Programs and Features window appears. From the Tasks list on the left, click on Turn Windows features on or off.
4. The Windows Features dialog appears with a list of available features. Locate the Internet Information Services entry and click the + sign to expand the tree.
5. Check the box next to Web Management Tools.
6. Click the + next to Web Management Tools to expand the feature tree.
7. Check the box next to IIS 6 Management Compatibility.
8. Click the + next to IIS 6 Management Compatibility and check the following items:
   - IIS 6 Management Console
   - IIS Metabase and IIS 6 configuration compatibility
9. Click the + next to World Wide Web Services to expand the feature tree.
10. Click the + sign next to Application Development Features and check off the following items:
   - .NET Extensibility
   - ASP
• ASP.NET  
• ISAPI Extensions  
• ISAPI Filters  
• Server-Side Includes.

11. Click the + sign next to Common HTTP Features and check off the following items:
   • Default Document  
   • Directory Browsing  
   • HTTP Errors  
   • Static Content  
   • WebDAV Publishing

12. Click the + sign next to Health and Diagnostics and check off the following items:
   • HTTP Logging  
   • Logging Tools  
   • Request Monitor  
   • Tracing

13. Check the box next to Performance Features.
14. Click the + sign next to Security and check off the following items:
   • Request Filtering  
   • URL Authorization  
   • Windows Authentication

Step 2: Installing Microsoft SQL Server

Microsoft SQL Server must be installed prior to installing MDsuite. While most clients deploy Microsoft SQL Server onto the same computer that they will install MDsuite, a separate database server with Microsoft SQL Server installed is also supported. Keep in mind that the procedures for installing your version of SQL Server may differ slightly than the steps outlined below. If installing a version of SQL Server Express, please be aware that while it is supported, the Advanced Services package is also required.

Installing SQL Server 2012

1. From the installation media location containing SQL Server 2012, run setup.exe. You may be prompted to install an update for Microsoft .NET Framework and the Windows Installer. Choose OK to install these necessary updates. You may be required to reboot the computer once installation of the prerequisite software is completed.

2. If you had to reboot the computer, restart the setup.exe program. The setup program will display the SQL Server Installation Center dialog.

3. From the list on the left, choose Installation. From the list of installation types on the right, choose New SQL Server stand-alone installation or add features to an existing installation.

4. The SQL Server 2012 setup will present a Setup Support Rules dialog that will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click OK to continue.

5. The SQL Server 2012 Setup dialog appears and will prompt you to either provide a product key or specify an evaluation version. Select Enter the product key: and provide your SQL Server 2012 product key. Click Next to continue.

6. The License Terms dialog appears. If you accept the terms of Microsoft’s license, check the box next to I accept the license terms. Click Next to continue.

7. The Setup Support Files dialog appears. Click Install to initialize installation of the SQL Server 2012 Setup Support Files. The Product Updates dialog box may appear if there are updated installation files available. Select “Include SQL Server product updates” and select Next. The updated installation files will begin downloading if an update is available. If no update is found online, click next to proceed.
8. The **Setup Support Rules** dialog appears and will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click **Next** to continue.

9. The **Setup Role** dialog will appear. “SQL Server Feature Installation” should be selected. Click **Next**.

10. The **Feature Selection** dialog will appear. Check the box next to the following items and click **Next**:

   - Database Engine Services
   - SQL Server Replication
   - Full-Text and Semantic Extractions for Search
   - Client Tools Connectivity
   - Client Tools Backwards Compatibility
   - Management Tools – Basic
   - Management Tools – Complete

11. The **Instance Configuration** dialog appears. You can specify SQL Server 2012 to be installed as the **Default instance** or specify a **Named instance**. You can also change the installed directory for SQL Server by specifying the desired path in the **Instance root directory** field. Click **Next** to continue.

12. The **Disk Space Requirements** dialog appears. Click **Next** to continue.

13. The **Server Configuration** dialog appears. You must specify an account for the services to run under. Provide the account name and password for **SQL Server Agent** and **SQL Server Database Engine**. Set the **SQL Server Browser** startup type to **Automatic**. Click **Next** to continue.

14. The **Database Engine Configuration** dialog appears. Select **Mixed Mode (SQL Server authentication and Windows Authentication)** and specify a password for the SQL Server “sa” account. Click the **Add** button and specify a local or domain account to add as an additional administrator. Click **Next** to continue.

15. The **Error and Usage Reporting** dialog will appear. If you want to send information to Microsoft about SQL Server 2012 errors and usage, check the boxes. Otherwise, just click **Next** to continue.

16. The **Installation Rules** dialog appears that will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click **Next** to continue.

17. The **Ready to Install** dialog appears with a list of features you selected for installation. Review your selections. If you need to make any changes, click **Back**, otherwise click **Install** to begin installation.

18. The **Installation Progress** dialog will appear and show you the progress of the installation processed. Once finished, click **Next** to continue.

19. The **Complete** dialog will appear. Click **Close** to end the installation. SQL Server 2012 is now installed.


21. Once you complete the installation of SQL Server 2012, you must download and install the SQL Server 2005 Backward Compatibility Components from the MDSuite ftp site: [ftp://dsiclient@ftp.mdsuite.com](ftp://dsiclient@ftp.mdsuite.com). When prompted for a password, enter: install (all lowercase).

   Download and install: **SQLSERVER2005_BC.MSI**

### Installing SQL Server 2008

1. These instructions are the same for both SQL Server 2008, and SQL Server 2008 R2.
2. From the installation media location containing SQL Server 2008, run **setup.exe**. You may be prompted to install an update for Microsoft .NET Framework and the Windows Installer. Choose **OK** to install these necessary updates. You may be required to reboot the computer once installation of the prerequisite software is completed.
3. If you had to reboot the computer, restart the **setup.exe** program. The setup program will display the **SQL Server Installation Center** dialog.
4. From the list on the left, choose **Installation**. From the list of installation types on the right, choose **New SQL Server stand-alone installation or add features to an existing installation**.

5. The SQL Server 2008 setup will present a **Setup Support Rules** dialog that will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click **OK** to continue.

6. The **SQL Server 2008 Setup** dialog appears and will prompt you to either provide a product key or specify an evaluation version. Select **Enter the product key**: and provide your SQL Server 2008 product key. Click **Next** to continue.

7. The **License Terms** dialog appears. If you accept the terms of Microsoft’s license, check the box next to **I accept the license terms**. Click **Next** to continue.

8. The **Setup Support Files** dialog appears. Click **Install** to initialize installation of the SQL Server 2008 Support Files.

9. The **Setup Support Rules** dialog appears and will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click **Next** to continue.

10. The **Feature Selection** dialog will appear. Check the box next to the following items:
    - Database Engine Services
    - SQL Server Replication
    - Full-Text Search
    - Client Tools Connectivity
    - Client Tools Backwards Compatibility
    - Management Tools – Basic

11. The **Instance Configuration** dialog appears. You can specify SQL Server 2008 to be installed as the **Default instance** or specify a **Named instance**. You can also change the installed directory for SQL Server by specifying the desired path in the **Instance root directory** field. Click **Next** to continue.

12. The **Disk Space Requirements** dialog appears. Click **Next** to continue.

13. The **Server Configuration** dialog appears. You must specify an account for the services to run under. Provide the account name and password for **SQL Server Agent** and **SQL Server Database Engine**. You can also specify one account for all services by clicking on **Use the same account for all SQL Server services** and providing an account name and password. Set the **SQL Server Browser** startup type to **Automatic**. Click **Next** to continue.

14. The **Database Engine Configuration** dialog appears. Select **Mixed Mode (SQL Server authentication and Windows Authentication)** and specify a password for the SQL Server “sa” account. Click the **Add** button and specify a local or domain account to add as an additional administrator. Click **Next** to continue.

15. The **Error and Usage Reporting** dialog will appear. If you want to send information to Microsoft about SQL Server 2008 errors and usage, check the boxes. Otherwise, just click **Next** to continue.

16. The **Installation Rules** dialog appears that will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click **Next** to continue.

17. The **Ready to Install** dialog appears with a list of features you selected for installation. Review your selections. If you need to make any changes, click **Back**, otherwise click **Install** to begin installation.

18. The **Installation Progress** dialog will appear and show you the progress of the installation processed. Once finished, click **Next** to continue.

19. The **Complete** dialog will appear. Click **Close** to end the installation. SQL Server 2008 is now installed.

20. Install the latest Service pack for SQL Server:
    a. For SQL Server 2008: [http://support.microsoft.com/kb/968382](http://support.microsoft.com/kb/968382)
    b. For SQL Server 2008 R2: [http://support.microsoft.com/kb/2527041](http://support.microsoft.com/kb/2527041)

21. Once you complete the installation of SQL Server 2008, you must download and install the **SQL Server 2005 Backward Compatibility Components** from the MDsuite ftp site:
Installing SQL Server 2005:

1. Launch the SQL Server 2005 Setup from your installation media.
2. The Microsoft SQL Server 2005 Setup dialog appears. Check the box next to I accept the licensing terms and conditions and click Next to continue.
3. The Installing Prerequisites dialog may appear. Click Install to have the prerequisite software copied to the server and click Next to continue.
4. The welcome dialog will appear. Click Next to proceed.
5. The System Configuration Check will run and inform you of any problems with your system configuration that need to be addressed before installing.
6. The Registration Information dialog appears. Provide name and company information and, if required, the Product Key that came with your SQL Server installation. Click Next to continue.
7. The Components to Install dialog appears. Check off SQL Server Database Services and Workstation Components, Books Online and Development Tools. Leave all others unchecked and click Next.
8. The Instance Name dialog appears. Choose Default Instance and click Next.
9. The Service Account dialog appears. Change to Use the built-in System Account and check the boxes next to SQL Server Agent and SQL Browser. Click Next to continue.
10. In the Authentication Mode dialog, set to Mixed Mode and specify a password for the SA account. Confirm this password and click Next to proceed.
11. When the Collation Settings dialog appears, make no changes. Just click Next to continue.
12. When the Error and Usage Report Settings appears, leave both boxes unchecked and click Next to continue.
13. When the Ready to Install dialog appears, click Install. Click Next and then click Finish to complete the installation.
14. The installation should begin. When it finishes, click Next and then click Finish.

Installing SQL Server 2012 Express with Advanced Services:

1. Launch the SQL Server 2012 Express installer. You may be prompted to install an update for Microsoft .NET Framework and the Windows Installer. Choose OK to install these necessary updates. You may be required to reboot the computer once installation of the prerequisite software is completed.
2. If you had to reboot the computer, restart the setup program. The setup program will display the SQL Server Installation Center dialog.
3. From the list on the left, choose Installation. From the list of installation types on the right, choose New SQL Server stand-alone installation or add features to an existing installation.
4. The SQL Server 2012 setup will present a Setup Support Rules dialog that will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click OK to continue.
5. The Product Key dialog will appear. However, the options should be greyed out with Specify a free edition selected by default. Click Next to continue.
6. The License Terms dialog appears. If you accept the terms of Microsoft’s license, check the box next to I accept the license terms. Click Next to continue.
7. The Setup Support Files dialog appears. Click Install to initialize installation of the SQL Server 2012 Setup Support Files. The Product Updates dialog box may appear if there are updated installation files available. Select “Include SQL Server product updates” and select Next. The updated installation files will begin downloading if an update is available. If no update is found online, click next to proceed.
8. The Setup Support Rules dialog appears and will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click Next to continue.
9. The Feature Selection dialog will appear. Check the box next to the following items:
   - Database Engine Services
   - Full-Text Search
   - SQL Server Replication
   - Management Tools – Basic

10. The Instance Configuration dialog appears. You can specify SQL Server 2012 to be installed as the Default instance or specify a Named instance. You can also change the installed directory for SQL Server by specifying the desired path in the Instance root directory field. Click Next to continue.

11. The Disk Space Requirements dialog appears. Click Next to continue.

12. The Server Configuration dialog appears. You must specify an account for the services to run under. Provide the account name and password for SQL Server Database Engine. Set the SQL Server Browser startup type to Automatic. Click Next to continue.

13. The Database Engine Configuration dialog appears. Select Mixed Mode (SQL Server authentication and Windows Authentication) and specify a password for the SQL Server “sa” account. Click the Add button and specify a local or domain account to add as an additional administrator. Click Next to continue.

14. The Error and Usage Reporting dialog will appear. If you want to send information to Microsoft about SQL Server 2012 errors and usage, check the boxes. Otherwise, just click Next to continue.

15. The Installation Rules dialog appears that will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click Next to continue.

16. The Ready to Install dialog appears with a list of features you selected for installation. Review your selections. If you need to make any changes, click Back, otherwise click Install to begin installation.

17. The Installation Progress dialog will appear and show you the progress of the installation processed. Once finished, click Next to continue.

18. The Complete dialog will appear. Click Close to end the installation. SQL Server 2012 Express is now installed.


Installing SQL Server 2008 Express with Advanced Services:

1. Launch the SQL Server 2008 Express installer. You may be prompted to install an update for Microsoft .NET Framework and the Windows Installer. Choose OK to install these necessary updates. You may be required to reboot the computer once installation of the prerequisite software is completed.

2. If you had to reboot the computer, restart the setup program. The setup program will display the SQL Server Installation Center dialog.

3. From the list on the left, choose Installation. From the list of installation types on the right, choose New SQL Server stand-alone installation or add features to an existing installation.

4. The SQL Server 2008 setup will present a Setup Support Rules dialog that will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click OK to continue.

5. The Product Key dialog will appear. However, the options should be greyed out with Specify a free edition selected by default. Click Next to continue.

6. The License Terms dialog appears. If you accept the terms of Microsoft’s license, check the box next to I accept the license terms. Click Next to continue.
7. The **Setup Support Files** dialog appears. Click **Install** to initialize installation of the SQL Server 2008 Setup Support Files.

8. The **Setup Support Rules** dialog appears and will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click **Next** to continue.

9. The **Feature Selection** dialog will appear. Check the box next to the following items:
   - Database Engine Services
   - Full-Text Search
   - SQL Server Replication
   - Management Tools – Basic

10. The **Instance Configuration** dialog appears. You can specify SQL Server 2008 to be installed as the **Default instance** or specify a **Named instance**. You can also change the installed directory for SQL Server by specifying the desired path in the **Instance root directory** field. Click **Next** to continue.

11. The **Disk Space Requirements** dialog appears. Click **Next** to continue.

12. The **Server Configuration** dialog appears. You must specify an account for the services to run under. Provide the account name and password for **SQL Server Agent** and **SQL Server Database Engine**. You can also specify one account for all services by clicking on **Use the same account for all SQL Server services** and providing an account name and password. Set the **SQL Server Browser** startup type to **Automatic**. Click **Next** to continue.

13. The **Database Engine Configuration** dialog appears. Select **Mixed Mode (SQL Server authentication and Windows Authentication)** and specify a password for the SQL Server “sa” account. Click the **Add** button and specify a local or domain account to add as an additional administrator. Click **Next** to continue.

14. The **Error and Usage Reporting** dialog will appear. If you want to send information to Microsoft about SQL Server 2008 errors and usage, check the boxes. Otherwise, just click **Next** to continue.

15. The **Installation Rules** dialog appears that will inform you of any problems that would obstruct installation. If any failures are detected, you must correct these and re-run setup. Otherwise, if all checks pass, click **Next** to continue.

16. The **Ready to Install** dialog appears with a list of features you selected for installation. Review your selections. If you need to make any changes, click **Back**, otherwise click **Install** to begin installation.

17. The **Installation Progress** dialog will appear and show you the progress of the installation processed. Once finished, click **Next** to continue.

18. The **Complete** dialog will appear. Click **Close** to end the installation. SQL Server 2008 Express is now installed.

19. Install the latest Service pack for SQL Server:
   a. For SQL Server 2008: [http://support.microsoft.com/kb/968382](http://support.microsoft.com/kb/968382)
   b. For SQL Server 2008 R2: [http://support.microsoft.com/kb/2527041](http://support.microsoft.com/kb/2527041)

20. Once you complete the installation of SQL Server 2008 Express, you must download and install the **SQL Server 2005 Backward Compatibility Components** from the MDsuite ftp site: [ftp://dsiclient@ftp.mdsuite.com](ftp://dsiclient@ftp.mdsuite.com). When prompted for a password, enter: install (all lowercase).

  Download and install: SQLSERVER2005_BC.MSI

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**Ready to Schedule Installation Appointment**

You are now ready to schedule your MDsuite installation appointment. You will need to fill out the attached Deployment Checklist, Server Information Form and Workstation Information Forms before an appointment can be scheduled. Once all forms are completed and signed please fax to: 858-486-5493 or scan and email to: mod00@mdsuite.com. Once PDS has received these documents our Systems Administrator will review and contact you to schedule your installation. Please have all necessary information available at the time of your appointment. This includes any logins and passwords that will be needed to complete the product installation.
Post Deployment

You have now finished the entire deployment process. You should review this section for further information on backup, remote access, and other areas of interest.

Remote Access

Clients upgrading their application server may be interested in remote access to their MDsuite software from home and abroad. There are many ways in which to accomplish this but the two most effective ways to setup remote access is to either:

2. Use a separate, dedicated Terminal Server for Remote Desktop services.

While we recommend either of these two methods, it is entirely up to the client to implement remote access, regardless of which medium is chosen. Whichever medium is chosen must provide sufficient security and encryption to satisfy HIPAA regulations.

Backing Up Data

Backing up mission critical data is important to the success of any practice or billing service. There are many different ways that data can be backed up, from tape and optical storage to online services. Some recommendations are:

1. An enterprise backup software package used in conjunction with external storage (removable hard drive, tape, etc…)
2. Backing up data to optical media such as blank CDs or DVDs.
3. Utilizing an online backup service for continuous backup protection.

While we recommend these options, it is entirely up to the client to implement any backup solution. Currently the most cost effective and recommended backup solution would be a combination of back up to disk and online backup. If that solution is cost prohibitive, we recommend that you use an enterprise level online backup solution such as Carbonite Pro or Mozy Pro. PDS cannot provide support for third party backup solutions, regardless of which method is used and is not responsible for any data loss. Refer to the third party software or service vendor for information and support and information.

Regardless of which solution you choose to back up data, you must ensure the following items are backed up:

- All MDsuite databases in SQL Server.
- The application installation directory (default: C:\Program Files\DSI\MDsuite Application Server)
- The Document Storage Folder (default (C:\DSI\DSF)
Server Information Form: Non-Virtualized

This form is used by Data Strategies, Inc. to facilitate the rapid deployment of MDsuite. The information provided on this form is kept secure and confidential. Please fill out this form completely and accurately. **Note:** An MDsuite installation appointment cannot be scheduled nor training dates finalized until we have a completed, signed copy of this form with all fields filled in with correct and accurate information. Please fax to 858-486-5493 with attention set to the Implementation Coordinator.

New Client □  Existing Client, New Server □

<table>
<thead>
<tr>
<th>Account #:</th>
<th>Client Name:</th>
<th>Implemented By:</th>
<th>Date:</th>
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</table>

**Application Server Information:**

Make:                      | Model: | Operating System: | 32 Bit | 64 Bit |
---------------------------|--------|-------------------|--------|--------|
CPU Brand:                 | CPU Type: | Speed (MHz): | CPU Qty.: | Cores per CPU: |
RAM:                      | Hard Drive Size: | # of Hard Drives: | RAID Level: | 0 | 1 | 5 | 10 | 50 | 60 |
Server Name:              | IP Address: | Domain Member: | Yes | No | Domain Name: |
SQL Server Version:       | SA Password: | SQL Data Path: |
Additional Info:          |          |                  |

**Database Server (If separate from App Server):**

Make:                      | Model: | Operating System: | 32 Bit | 64 Bit |
---------------------------|--------|-------------------|--------|--------|
CPU Brand:                 | CPU Type: | Speed (MHz): | CPU Qty.: | Cores per CPU: |
RAM:                      | Hard Drive Size: | # of Hard Drives: | RAID Level: | 0 | 1 | 5 | 10 | 50 | 60 |
Server Name:              | IP Address: | Domain Member: | Yes | No | Domain Name: |
SQL Server Version:       | SA Password: | SQL Data Path: |
Additional Info:          |          |                  |

**Transimssion Server (If required)**

Make:                      | Model: | Operating System: | 32 Bit | 64 Bit |
---------------------------|--------|-------------------|--------|--------|
CPU Brand:                 | CPU Type: | Speed (MHz): | CPU Qty.: | Cores per CPU: |
RAM:                      | Hard Drive Size: | # of Hard Drives: | RAID Level: | 0 | 1 | 5 | 10 | 50 | 60 |
Server Name:              | IP Address: | Domain Member: | Yes | No | Domain Name: |
SQL Server Version:       | SA Password: | SQL Data Path: |
Additional Info:          |          |                  |

**Remote Access Information**

Connectivity Type: VNC RDP Citrix PPTP VPN SSL VPN Other (specify):

IP Address: | Username: | Password: |

Additional Info: |

Print Name: ___________________  Title: ___________________
Signature: ___________________  Date: ____________

Note: If you have multiple application servers or multiple data servers, attach a separate copy of this form with the appropriate areas filled out.
## Server Information Form: Virtualized

This form is used by Data Strategies, Inc. to facilitate the rapid deployment of MDsuite. The information provided on this form is kept secure and confidential. Please fill out this form completely and accurately. **Note:** An MDsuite installation appointment cannot be scheduled nor training dates finalized until we have a completed, signed copy of this form with all fields filled in with correct and accurate information. Please fax to 858-486-5493 with attention set to the Implementation Coordinator.

### New Client ☐   Existing Client, New Server ☐

<table>
<thead>
<tr>
<th>Account #</th>
<th>Client Name</th>
<th>Implemented By</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

### Virtualization Platform

<table>
<thead>
<tr>
<th>Virtualization Software</th>
<th>☐ VMWare ESX</th>
<th>☐ Citrix Xen</th>
<th>☐ Hyper-V</th>
<th>☐ Other (specify):</th>
</tr>
</thead>
</table>

### Host Virtualization Server

<table>
<thead>
<tr>
<th>Make</th>
<th>Model</th>
<th>Operating System</th>
<th>CPU Brand</th>
<th>CPU Type</th>
<th>Speed (MHz)</th>
<th>CPU Qty.</th>
<th>Cores per CPU</th>
<th>RAM</th>
<th>Hard Drive Size</th>
<th># of Hard Drives</th>
<th>RAID Level: 0 1 5 10 50 60</th>
<th>Server Name</th>
<th>IP Address</th>
<th>Domain Member</th>
<th>Yes ☐ No ☐</th>
<th>Domain Name</th>
<th>Additional Info</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

### Clustered Environment

- If Clustered, # of Nodes: ☐
- *Clustered nodes are as specified above?: Yes ☐ No ☐

### Application Server Instance

<table>
<thead>
<tr>
<th># of Application Server Instances</th>
<th>CPUs per Instance</th>
<th>RAM per Instance</th>
<th>Storage per Instance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>☐ 32 Bit</td>
<td>☐ 64 Bit</td>
<td></td>
</tr>
<tr>
<td>Operating System:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domain Member: Yes ☐ No ☐</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domain Name:</td>
<td></td>
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<tr>
<td>SQL Version:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SA Password:</td>
<td></td>
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</tbody>
</table>

### Database Server Instance (if separate)

<table>
<thead>
<tr>
<th># of Database Server Instances</th>
<th>CPUs per Instance</th>
<th>RAM per Instance</th>
<th>Storage per Instance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>☐ 32 Bit</td>
<td>☐ 64 Bit</td>
<td></td>
</tr>
<tr>
<td>Operating System:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domain Member: Yes ☐ No ☐</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domain Name:</td>
<td></td>
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<tr>
<td>SA Password:</td>
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</tbody>
</table>

### Remote Access Information

<table>
<thead>
<tr>
<th>Connectivity Type</th>
<th>☐ VNC</th>
<th>☐ RDP</th>
<th>☐ Citrix</th>
<th>☐ PPTP VPN</th>
<th>☐ SSL VPN</th>
<th>☐ Other (specify):</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>IP Address</th>
<th>Username</th>
<th>Password</th>
<th>Additional Info</th>
</tr>
</thead>
</table>

### Print Name: ___________________________  Title: ___________________________

### Signature: ___________________________  Date: ___________________________

*Note: If you have multiple application servers or multiple data servers, attach a separate copy of this form with the appropriate areas filled out.*
Workstation Information Form

This form is used by Data Strategies, Inc. to facilitate the rapid deployment of MDsuite. The information provided on this form is kept secure and confidential. Please fill out this form completely and accurately. **Note:** An MDsuite installation appointment cannot be scheduled nor training dates finalized until we have a completed, signed copy of this form with all fields filled in with correct and accurate information. Please fax to 858-486-5493 with attention set to the Implementation Coordinator.

New Client [ ] Existing Client [ ]

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<tr>
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</table>

**Workstation Information:**

<table>
<thead>
<tr>
<th>Make:</th>
<th>Model:</th>
<th>Operating System:</th>
<th>32 Bit</th>
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<table>
<thead>
<tr>
<th>CPU Brand:</th>
<th>CPU Type:</th>
<th>Speed (MHz):</th>
<th>CPU Qty.:</th>
<th>Cores per CPU:</th>
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<table>
<thead>
<tr>
<th>RAM:</th>
<th>Hard Drive Size:</th>
<th># of Hard Drives:</th>
<th>RAID Level:</th>
<th>0</th>
<th>1</th>
<th>5</th>
<th>10</th>
<th>50</th>
<th>60</th>
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<table>
<thead>
<tr>
<th>Computer Name:</th>
<th>Anti Virus:</th>
<th>Domain Member:</th>
<th>Yes [ ]</th>
<th>No [ ]</th>
<th>Domain Name:</th>
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<thead>
<tr>
<th>Local:</th>
<th>Remote:</th>
<th>If remote, how:</th>
<th>Wired:</th>
<th>Wireless:</th>
<th>Access Point:</th>
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Print Name: ___________________________ Title: ___________________________
Signature: ___________________________ Date: ___________________________

Note: If you have multiple workstations exceeding this page, attach a separate copy of this form with the appropriate areas filled out.