Practice Partner

Installation Guide

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Copyright notice

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Product

Practice Partner, Release 11.2

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Revision history

Date	Page (s)	Description
05/11/2016	various	Changed references to McKesson to eMDs.
07/24/2017	10, 13	Updated the Download your Products from the Customer Support Website and Download your License Files sections.
10/04/2017	8, 41	Added a note to remind user to check the Patch Release Notes documents for any database changes.
01/04/2018	9	Added Windows Server 2016 Standard as a supported operating system for Group Policy Management Console.
02/19/2018	43	Added a new task to Post-Installation Tasks.
05/15/2018	9	Clarified that Windows 10 Home is not a supported operating system for Group Policy Management Console.
05/30/2018	43	Added new "Install patches" task to Post-Installation Tasks.

Date	Page (s)	Description
01/18/2019	21, 44, 75	Updated step 10 in the Application Server Installation section. Added new Upgrading to Practice Partner Release 11.2 section. Updated the Practice Partner Add-on Products section.
01/24/2019	15	Added a new entry in the table in the Features and requirements for the Practice Partner installation section.
02/21/2019	79	Added a new Reinstalling the EMR section.
03/27/2019	1	Updated the link for the Support website in the Product documentation and Technical assistance sections.

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Chapter 1 - Introduction

This guide takes you step-by-step through the process of installing Practice Partner on your server and workstations. Before you begin the installation, carefully read and understand all sections in this guide.

This guide references "Practice Partner," a concept that implies that you are installing one of the following.

- Patient Records and/or Appointment Scheduler with Medical Billing (Total Practice Partner)
- Patient Records and Appointment Scheduler
- Patient Records for Windows
- Medical Billing for Windows

Because this guide covers the installation of all the products listed above, pay attention to the product-specific steps in this document. You need to complete only the steps that are applicable to the product you are installing. The product-specific steps or notes will be preceded with the product name in bold type; for example, **Medical Billing Sites only**.

Add-on modules

For step-by-step instructions for installing add-on modules, see the *Practice Partner Add-ons Configuration and Installation Guide*.

Product documentation

You can find the Practice Partner documentation referenced in this guide and the latest product documentation located at https://Supportcenter.emds.com/Richmond.

Comments welcome

We welcome your comments and suggestions on this guide. Feel free to contact eMDs.

Technical assistance

For technical assistance, contact Practice Partner Technical Support at https://Supportcenter.emds.com/Richmond, or by calling the number appropriate to your type of organization. Follow the prompts and listen to all available choices as menu options may change.

- Independent Support: 1-855-IND-TEAM (463-8326)
- VAR Support: 1-855-VAR-TEAM (827-8326)
- Enterprise Support: 1-855-ENT-TEAM (368-8326)

In this chapter

This chapter contains the following topics.

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System Requirements

Running the Practice Partner system requires certain products in the following areas.

- Server operating system

- Client workstations

- Third party software

For a complete list of system requirements, see the *Practice Partner System Requirements Guide*.

Limiting User Access to Practice Partner Programs

Medical Billing for Windows, Patient Records, Appointment Scheduler, Order Entry, and Alpha II CodeWizard are all licensed separately. If you purchased a limited number of licenses, you can limit who has access to the applications to avoid running out of licenses.

On the General tab of the Access Level Configuration screen, when you...	Then a user assigned this access level will use a...
leave the following three items deselected for an access level • Hide AS except Provider Schedule? • Hide PR? • Hide Orders?	Patient Records user license, an Appointment Scheduler user license, and an Order Entry license.
select the **Allow access to MB** item for an access level	Medical Billing for Windows license.

You can configure a user's access to Practice Partner applications by selecting and clearing the appropriate access level items. For example, if you want the user to access only Medical Billing for Windows, select the Access cell for **Hide AS except Provider Schedule**, **Hide PR?**, and **Hide Orders**, and select **Allow access to MB**. The user will use only a Medical Billing user license.

Using Batch Files to Start and Stop Services

If your organization uses batch files to start and stop services (for example, PMSI Application Server), this could adversely affect your organization's ability to send and receive claims with the Electronic Claims functionality, as claims are processed through services. eMDs recommends that you stop and start services manually.

Notes for Electronic Medical Record (EMR) Sites Only

The following notes contain important information for sites installing Patient Records/Appointment Scheduler or Total Practice Partner.

Order Entry

Some Order Entry items (such as the **Hide Orders?** access item) may appear in Patient Records, even if you have not purchased Order Entry licenses. These items are not functional without a license.

Prescription format files

Practice Partner provides an example prescription format file in HTML format (Rx.cfg). This file is designed specifically for use with the Practice Partner HTML Editor. You can modify this file to suit your needs or use it as is.

For more information, see the *Printed Prescription Configuration Guide*.

The example Rx.cfg file includes the following information.

- Date.

- Patient's name and address.

- First six allergies on the patient's allergy list.

- Details of the prescription (including up to six lines of the extended sig and the note).

- Provider name.

- Provider DEA, if the prescription is a controlled substance.

- Practice name, address, phone number, and fax number.

- Two areas for the provider to sign the printed prescription: one labeled 'Substitution Permitted' and one labeled 'Dispense as Written'.

The example Rx.cfg file is located in the database directory (usually p:\ppart) and the \ppeditor directory (usually p:\ppart\ppeditor\).

Note: The Rx.cfg file applies only to printed and faxed prescriptions; it does not apply to transmitted prescriptions (sent using the Practice Partner ePrescribing module).

Chapter 2 - Preparing for your Practice Partner Installation

This chapter provides instructions for the tasks you need to complete prior to installing your Practice Partner product(s), add-on products, interfaces, and licenses.

In this chapter

This chapter contains the following topics.

Preinstallation Tasks

The preinstallation process includes the following tasks.

- Verifying that your server and client specifications meet Practice Partner's minimum requirements.

- Installing Microsoft tools if you want to use Active Directory to install Practice Partner on client workstation(s).

- Installing and configuring your database for Practice Partner on your server and client workstation(s).

- Installing the proper Oracle Data Access Components (ODAC) - this is for Oracle sites only.

- Backing up your server(s).

- Downloading your software from the eMDs Practice Support website.

- Downloading your license files from the eMDs Practice Support website.

Important: Make sure to review the Patch Release Notes documents for any necessary database changes. The Patch Release Notes documents are available on Salesforce.

Verify Minimum Requirements for your Server and Client

Your server and client machine specifications must conform to Practice Partner's minimum suggested requirements.

Each server and client machine must have enough free space to hold the installation. The application server must have at least 2 GB of free space available on the system partition. You can use the Practice Partner Custom Installation option to make sure that you have enough disk space available for the installation.

For more information, see the *Practice Partner System Requirements Guide*.

Install Microsoft Tools for Active Directory

If you want to use Active Directory to install Practice Partner on your client workstation(s), you must have the following Microsoft tools installed.

Tool	Description
Microsoft Visual C++ redistributables	The Microsoft Visual C++ Redistributable package must be installed on each client workstation. Visit the Microsoft Download website for more information.
Orca	The Orca database editor is available in the Windows SDK Components for Windows Installer Developers. You can obtain Orca by downloading and installing the Windows Installer SDK. Visit the Microsoft Download website for more information.

Tool	Description
Group Policy Management Console	If you are a user who has the ability to edit Group Policy (you are a domain administrator or you have been given those rights by your domain administrator), you can install the Group Policy Management Console on the following operating systems. • Windows Vista Business Edition • Windows 7 Professional, Ultimate, or Enterprise Edition • Windows 8 Professional or Enterprise Edition • Windows Server 2008 • Windows Server 2008 R2 • Windows Server 2012 • Windows Server 2016 Standard **NOTE**: Windows 10 Home is not supported. Visit the Microsoft Download website for more information.

Install and Configure your Database for Practice Partner

Depending on what database server your site decides to use for Practice Partner, you must complete the following tasks before the installation. The information you enter here will be required to complete the installation.

Database	What to run:	To complete the installation, you need to know the...	For installation instructions, see:
SQL Server	A script to create file groups.	hostname, instance name, user name, password, and target database name for your Practice Partner SQL Server instance.	"Creating a Microsoft SQL Server Database for Practice Partner" on page 45.
Oracle	The Oracle tablespace script.	hostname, port number, username, password, and service name for your Practice Partner Oracle Server instance.	"Creating an Oracle Database for Practice Partner" on page 53.

Database	What to run:	To complete the installation, you need to know the...	For installation instructions, see:
c-tree Server	The FairCom Server Activation utility. You do not need to run this utility if you already have c-tree Server installed.	location of your c-tree Server binaries (for example the standard path for c-tree Server is **C:\FAIRCOM\v7.12\c-treeserver\c-treeserver**).	"Installing and Administering a c-tree Server for Practice Partner" on page 61.

If you are using c-tree Plus, no additional configuration is required.

Back up your Servers

Have a complete backup of each server before the installation.

Download your Products from the Customer Support Website

This section provides step-by-step instructions for downloading your products from the eMDs Practice Support website and extracting your installer files. Once you are logged into the eMDs Practice Support website, you can view your organization's registered Practice Partner 11.0 products on the Product Downloads and License Files page. To successfully install 11.0, you must download all of your products in the Registered Products list. To do this, repeat the steps below for each of the registered products in the list.

To download your software:

1. Go to the eMDs Practice Support website at https://practicesupport.emds.com.

2. Enter your eMDs Practice Support website user name and password, and then click the **Login** button.

   If you do not have an eMDs Practice Support website account, contact the Project Manager or Install Engineer assigned to your organization to get details for your eMDs Practice Support website account.

3. Under **Quick Links** on the left side of the page, click the **Downloads & License Files** link.
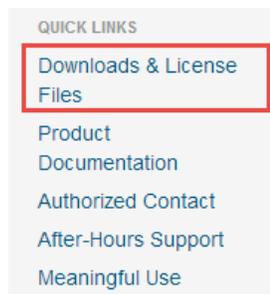
Figure 1. eMDs Practice Support website - Quick Links

The Product Downloads and License Files page appears.

Figure 2. Product Downloads and License Files page

4. To download the current version (11.0) of the application, click the **Download Current Version** button for that application.

   To download the previous version (9.5.2) of the application, click the drop-down arrow on the **Download Current Version** button and select **Download Previous Version** from the menu.

   See the tables in "Practice Partner Supplemental Functionality" for a complete list of product names and the product names as they appear on the website.

Figure 3. Product Downloads and License Files page

Note: If your version number is not 11.0, or a product that you have purchased is not in the list of registered products, call Practice Partner Technical Support as you will be unable to download the latest version.

The PRWIN, MBWIN, and ASWIN products are all the same software. You need to download only one of these from the eMDs Practice Support website. The appropriate options will be installed based on the contents of your license file. There is no content download specific to the Order Entry product. If your organization is licensed for Order Entry, it will be included as part of the Patient Records installation.

5. The File Download - Security Warning dialog box appears. Click the **Save** button.

6. Choose a download location on your hard disk and click **Save**. The download process begins. After the process is complete, the Download Complete dialog box appears.

7. Do one of the following:

   - **Click the Run button.**

   or

   a. Click the **Open Folder** button to open the folder where the system saved the download.

   b. Double-click the .exe file.

8. The default extraction path is **C:\eMDs\11.0**. eMDs recommends that you do not change the default path.

9. Click the **OK** button to start the extraction.

10. The files are extracted to the default location. If the files were extracted successfully, a confirmation message appears. Click the **OK** button.

11. Repeat the steps above to download all of your purchased products from the eMDs Practice Support website.

Download your License Files

New license files are required for each new version of Practice Partner. You can download the product license files from the eMDs Practice Support website.

To download your license files:

1. Under **Quick Links** on the left side of the eMDs Practice Support website, click the **Downloads & License Files** link.
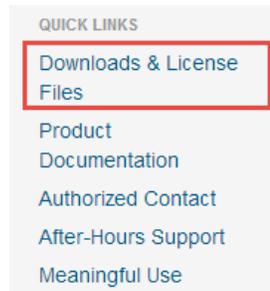
Figure 4. eMDs Practice Support website - Quick Links

The Product Downloads and License Files page appears.

Figure 5. Product Downloads and License Files page

2. To download the current (11.0) license file, click the drop-down arrow on the **Download Current Version** button and select **Download License File** from the menu.

   To download the previous (9.5.2) license file, click the drop-down arrow on the **Download Current Version** button and select **Download Previous License** from the menu.


Figure 6. Product Downloads and License Files page

The license file will be downloaded immediately to your machine.

Chapter 3 - Installing Practice Partner

The installation procedures in this chapter are for new Practice Partner sites.

This chapter takes you step-by-step through the process of installing Practice Partner on your server and workstations.

Note: Do not rename or move the Practice Partner directory after the installation. This directory is used to register Practice Partner files and the program may fail to work if you change the directory name.

Features and requirements for the Practice Partner installation

The following table describes the features/requirements of the Practice Partner installation.

Feature/Requirement	Is user interaction required?
If you do not have Crystal Reports v13 installed, the Practice Partner installer will install it for you.	No.
If you do not have Microsoft .NET Framework 4.0 or Microsoft Windows Installer 4.5 installed on the server and client, the Practice Partner installer will install these components for you. In order to make the necessary updates, your server and client workstation(s) must have a valid Internet connection.	Not unless a reboot is required (typically from the Microsoft Windows installer patch).
Add **download.microsoft.com** to your trusted sites list, or disable Internet Explorer Enhanced Security Configuration (ESC) on your server.	Yes, see Internet Explorer online help for instructions and more information.
If you do not have a logical drive present on your machine, the Typical Installation option will not be available. You must select the Custom Installation option to complete the installation. You cannot install to a mapped drive; you must install on a physical fixed drive.	No.
Three services will be installed and started on the server: PMSI Application Server, PMSI Data Server, and PMSI Interoperability Service.	No.
If you are using a c-tree Server database, c-tree Server will be migrated to a service as part of the installation. The PMSI Ctree Server service will be started on the Server after the installation.	No.

Feature/Requirement	Is user interaction required?
Microsoft Visual C++ Runtime 10.0 will be installed on the client and server.	No.
If you are using an Oracle database and are using any version of Windows Server 2012 or 2016 for your application server, you must install .NET Framework 3.5 Features first and then the Oracle client. The Practice Partner install will NOT automatically install either and the Practice Partner install will fail if .NET Framework 3.5 Features is not installed first. Note that when installing the .NET Framework 3.5 Features in Windows 2012 or 2016 server, you will need to specify an alternate source path to the Windows Server installation media.	Yes.

In this chapter

This chapter contains the following topics.

Application Server Installation

If you are using Windows Terminal Services (WTS) or Citrix, use the `change user` command at a command prompt to switch your Terminal Services server to Install mode.

1. Click Start > **Run**.

2. In the Open box, enter **cmd** and click OK.

3. At the command prompt, enter **change user /install** and press **Enter**. The following message appears: 'User session is ready to install applications'.

4. Enter **exit** and press **Enter**.

5. Add or remove the programs that you want.

To install the application server:

1. Log on as the local administrator on your server.

2. Refer to the following table.

Do you have a CD?	Then...
Yes	insert the Practice Partner - Server CD into the CD-ROM drive on your server. If the CD does not start automatically, complete the following steps. 1. Select **Run** from the Start button on the taskbar. 2. Enter **d:\setup.exe**, where **d** is the location of (or complete path to) the CD-ROM drive. 3. Click **OK**.
No	browse to the folder where you saved the Practice Partner Server setup.exe file when you downloaded it from the eMDs Practice Support website and copy the setup.exe file to your server. Double-click **setup.exe**.

If you do not have Microsoft .NET Framework 4.0 installed, NET 4.0 installs automatically on the server. After .NET is installed, it will determine if a reboot is required. If a reboot is required, a dialog box displays giving you the choice to reboot now or later. You must reboot before continuing with the installation. After the reboot is complete, if the installation does not restart automatically, you should restart the installation.

The Welcome screen appears.
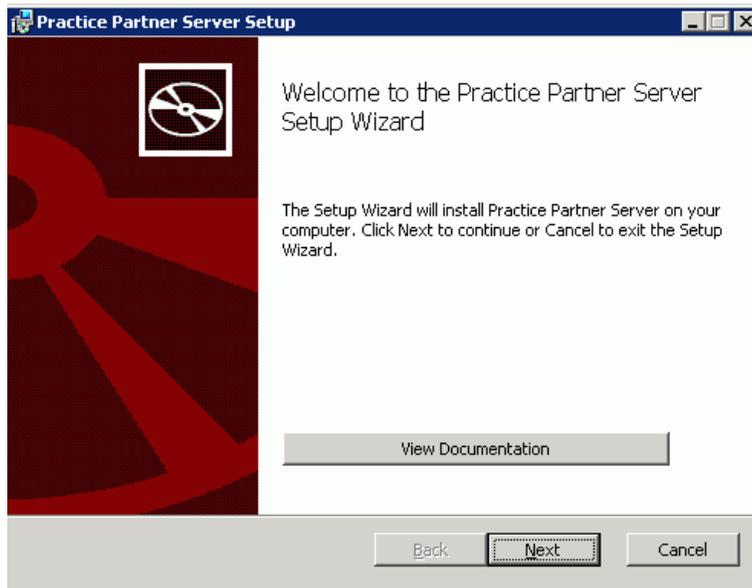
Figure 7. Welcome screen

4. Click **Install Practice Partner Server** to proceed with the Practice Partner installation. The End-User License Agreement screen appears.

Figure 8. End-User License Agreement screen

5. Read the license agreement, select the **I accept the terms in the License Agreement** check box, and click **Next**. (If you want to print the license agreement, click **Print** before you click **Next**.) The Practice Partner License screen appears.
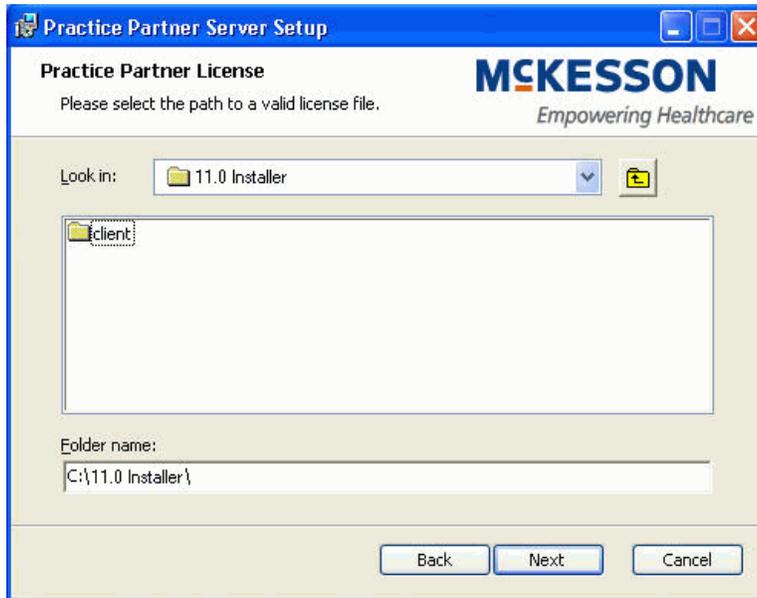
Figure 9. Practice Partner License screen

6. Select the location of the license file.

    a. The default location for the license file is the C: drive. If you are using a license file located at any other location, you can navigate to the license file's location.

    b. After you select the license file folder, click **Next**.

Note: New license files are required for each new version of Practice Partner. If you have not downloaded your license files, exit the installation and download the license files from the eMDs Practice Support website. For complete download instructions, see "Download your License Files" on page 13.

The Initial posting date screen appears.

Figure 10. Initial posting date screen

7. For Medical Billing and Total Practice Partner sites only: Enter the month, day, and year (mm/dd/yyyy format) of the initial posting date in the provided field.

8. Enter a username and password to create a new user account. This account will have complete access to Practice Partner, including the ability to set and change password protection for other users of the program. Practice Partner provides several levels of password protection; the default system level is 'HI'. Complete the fields as indicated in the following table.

Field	Description
Username	Enter a username.
Password	Enter a password.
	For security reasons, your password must be a minimum of eight characters long and consist of a combination of letters and at least one number and one non-alphanumeric character. Your password cannot be the same as your username.
Verify Password	Enter the password you entered in the Password field.

9. Click **Next**. The Clearinghouse activation screen appears.
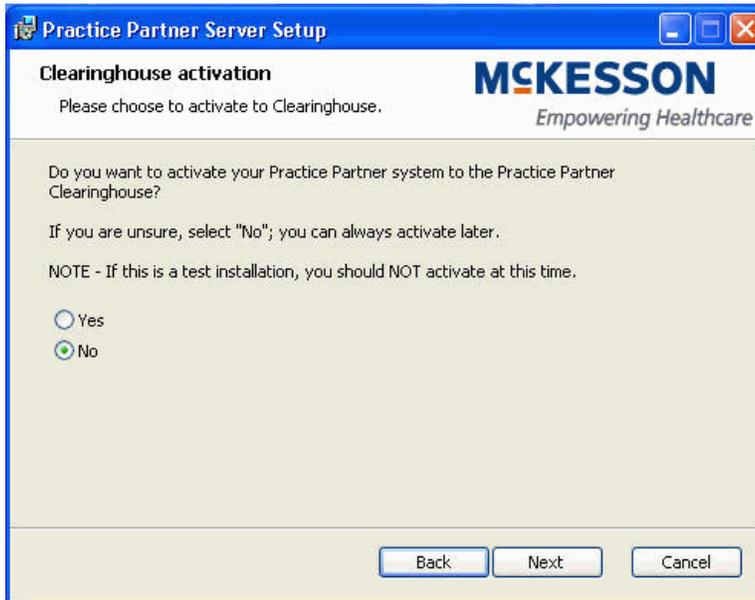
Figure 11. Clearinghouse activation screen

10. Select **No** and click the **Next** button. The Choose Setup Type screen appears.
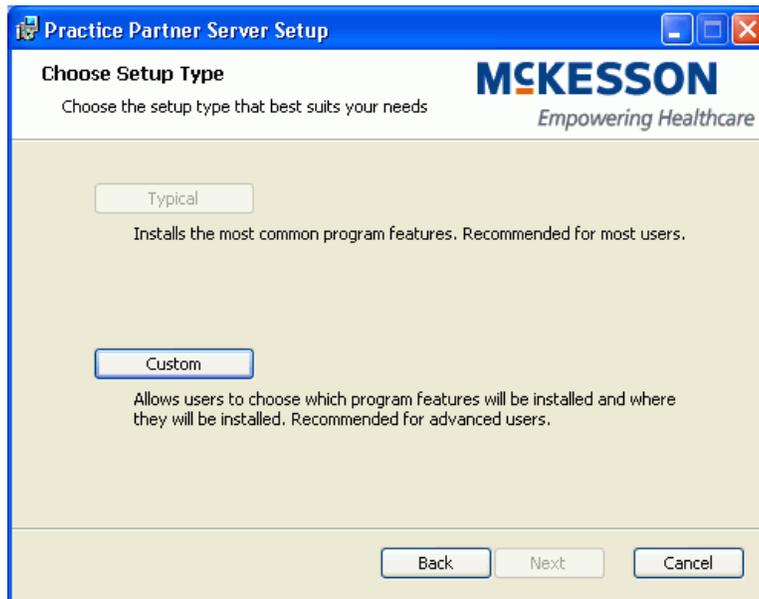
Figure 12. Choose Setup Type screen

11. Use the following table to determine which button to click.

Button	Description
Typical	Installs the most common program features. Click this button only if you are using a c-tree Server database. If you are using an Oracle, Microsoft SQL Server, or c-tree Plus database, you must click **Custom** to complete the installation. If you do not have a logical drive present on your machine, this button is not available. You must click **Custom** to complete the installation. If you click this button, continue with step 14 in "Typical Installation" on page 22.
Custom	Allows you to choose which program features to install and where they will be installed. You must click this button if you are using an Oracle, Microsoft SQL Server, or c-tree Plus database. If you click this button, continue with step 14 in "Custom Installation" on page 23.

Typical Installation

12. Click **Typical**. The Ready to Install Practice Partner Server screen appears.

13. Click **Install** to begin the installation. The Installing Practice Partner screen displays the status of the installation.

    If you chose to activate your system to the Practice Partner Clearinghouse, a confirmation message appears if the activation is successful. If the activation fails, an error message appears explaining what caused the error. To retry the activation, click **Retry Activation**. If you want to activate later, click **Activate Later**. You can activate your system later by double-clicking **pmsi.ch.activation.exe** located in the \ppart directory.

14. When the installation is complete, click **Finish**.

    The installation placed required registry keys in the registry of your application/file server. Reboot your server before production use of the Practice Partner application to ensure that these settings are enabled.

15. Install the client components. See "Client Workstation Installation" on page 31.

16. If you want to use the auto-generate demographic IDs feature, see "Auto-Generate Demographic IDs" on page 69.

Custom Installation

14. Click **Custom**. The Custom Setup screen appears.
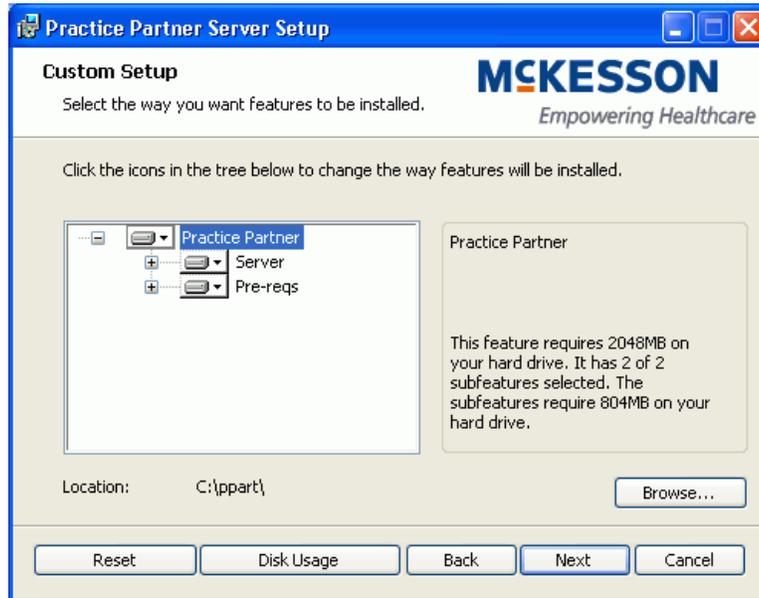
Figure 13. Custom Setup screen

15. The following table describes how the options on this screen allow you to set your preferences for the way features will be installed on your computer.

Click...	To...
the plus signs (+) in the tree structure	view all available features for which you can set preferences.
a feature icon	open a menu with the installation options that you can select for the feature. Click a menu item on the list to select it.
a feature	see the amount of disk space that is required to install the feature and its sub-features on your computer.
the Disk Usage button	make sure that you have enough disk space available on the selected disk drive. This button opens the Disk Space Requirements screen that lists • all disk drives (volumes) you have on your computer. • the total disk size for each disk volume. • the available space. • the required space. • the disk space that will remain available after you install the respective feature.

Click...	To...
the Browse button	select a different destination folder for the installation.
the Reset button	clear all of your selections, if needed.

16. Click **Next**. The Select Database Type screen appears.
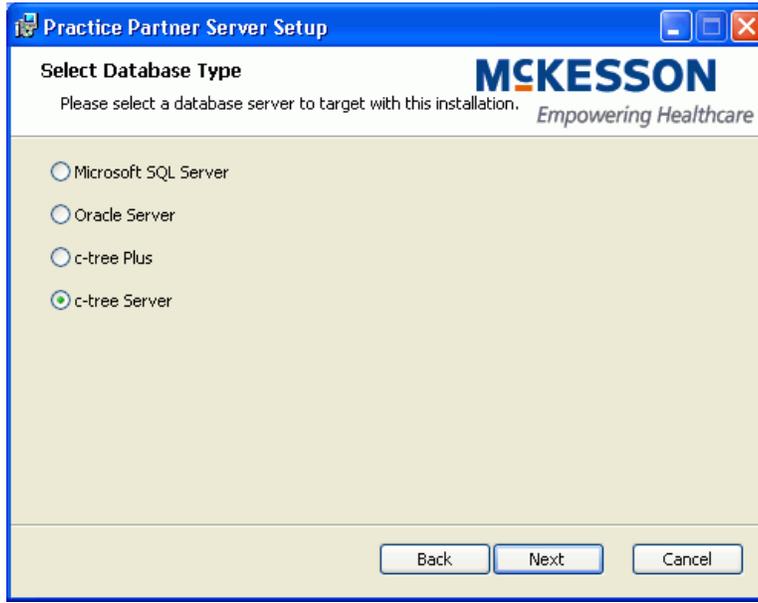
Figure 14. Select Database Type screen

17. Select the database type that you are using and click **Next**. The following table lists the screen that appears depending on what database type you selected.

If you selected...	Then this screen appears...
Microsoft SQL Server	MSSQL Instance Info. See "Setting up Microsoft SQL Server" on page 26 to complete the installation.
Oracle Server	Oracle Instance Info. See "Setting up Oracle Server" on page 28 to complete the installation.

If you selected...	Then this screen appears...
c-tree Plus	Ready to install Practice Partner Server. 1. Click **Install** to begin the installation. The Installing Practice Partner screen displays the status of the installation. If you chose to activate your system to the Practice Partner Clearinghouse, a confirmation message appears if the activation is successful. If the activation fails, an error message appears explaining what caused the error. To retry the activation, click **Retry Activation**. If you want to activate later, click **Activate Later**. You can activate your system later by double-clicking **pmsi.ch.activation.exe** located in the \ppart directory. 2. When the installation is complete, click **Finish**. The installation placed required registry keys in the registry of your application/file server. Reboot your server before production use of the Practice Partner application to ensure that these settings are enabled. 3. Install the client components. See "Client Workstation Installation" on page 31.
c-tree Server	c-tree Server Information. See "Setting up c-tree Server" on page 29 to complete the installation.

Setting up Microsoft SQL Server

If you selected the Microsoft SQL Server option on the Select Database Type screen, the MSSQL Instance Info screen appears. Use this screen to enter the information needed for a connection to a Microsoft SQL instance.


Figure 15. MSSQL Instance Info screen

Before the installation, you must create a SQL Server Practice Partner database and run a script to create file groups. See the "Creating a Microsoft SQL Server Database for Practice Partner" on page 45 for step-by-step instructions.

The Practice Partner installation will create a Microsoft SQL Server username and password (for example, **pp_dbname_app** and **pp_dbname_upd**, where **dbname** is the name of the Microsoft SQL Server database). Once the installation creates the username and password, do not delete or change them in the database.

To set up your MSSQL Server:

1. Refer to the following table to complete the fields on the MSSQL Instance Info screen.

Field	Value
Host	Enter the hostname of the database server (the name of the host instance of SQL Server).
Instance	Enter the SQL Server instance name (the name of the server on the host) that you want to use with Practice Partner.

Field	Value
Username	Enter **PPINSTALL**. This is the SQL Server username created for your SQL Server instance. The username allows the installer to log onto SQL Server. The user must be a member of the securityadmin fixed server role and have privileges to create users and roles.
Password	Enter the SQL Server user account password. This is the password created for your SQL Server instance. The password allows the Practice Partner installer to log onto SQL Server.
Target DB	Enter the name of the target database. This is the name you entered when you created the database, and will be the database on which Practice Partner will be created.

2. Click **Next**. The Ready to install Practice Partner Server screen appears.

3. Click **Install** to begin the installation. The Installing Practice Partner screen displays the status of the installation.

   If you chose to activate your system to the Practice Partner Clearinghouse, a confirmation message appears if the activation is successful. If the activation fails, an error message appears explaining what caused the error. To retry the activation, click **Retry Activation**. If you want to activate later, click **Activate Later**. You can activate your system later by double-clicking **pmsi.ch.activation.exe** located in the \ppart directory.

4. When the installation is complete, click **Finish**.

   The installation places required registry keys in the registry of your application/file server. Reboot your server before production use of the Practice Partner application to ensure that these settings are enabled.

Setting up Oracle Server

If you selected the Oracle Server option on the Select Database Type screen, the Oracle Instance Info screen appears. Use this screen to enter the information needed for a connection to an Oracle instance.


Figure 16. Oracle Instance Info screen

Before the installation, you must create an Oracle Server Practice Partner database and run a script to create the proper tablespaces. See the "Creating an Oracle Database for Practice Partner" on page 53 for step-by-step instructions.

The Practice Partner installation will create an Oracle username and password (for example, **pp_dbname_app** and **pp_dbname_upd**, where **dbname** is the name of the Oracle database). Once the installation creates the username and password, do not delete or change them in the database.

To set up your Oracle Server:

1. Refer to the following table to complete the fields on the Oracle Instance Info screen.

Field	Value
Host	Enter the hostname of the database server. This field defaults to the name of the machine on which the installation in running.
Port	Enter the network port number.
Username	Enter the username for the Oracle instance. This is the username created when the database was created. The name must be **sys**.
Password	Enter the user password for the Oracle instance.

Field	Value
Service Name	Enter the Oracle instance name (the name of the server on the host). This is the name of the Oracle instance that your site wants to use with Practice Partner.

2. Click **Next**. The Ready to install Practice Partner screen appears.

3. Click **Install**. The installation begins and the Installing Practice Partner screen displays the status of the installation.

   If you chose to activate your system to the Practice Partner Clearinghouse, a confirmation message appears if the activation is successful. If the activation fails, an error message appears explaining what caused the error. To retry the activation, click **Retry Activation**. If you want to activate later, click **Activate Later**. You can activate your system later by double-clicking **pmsi.ch.activation.exe** located in the \ppart directory.

4. When the installation is complete, click **Finish**.

   The installation places required registry keys in the registry of your application/file server. Reboot your server before production use of the Practice Partner application to ensure that these settings are enabled.

Setting up c-tree Server

If you selected the c-tree Server option on the Select Database Type screen, the c-tree Server information screen appears. Use this screen to enter the information needed for a connection to your c-tree Server database.
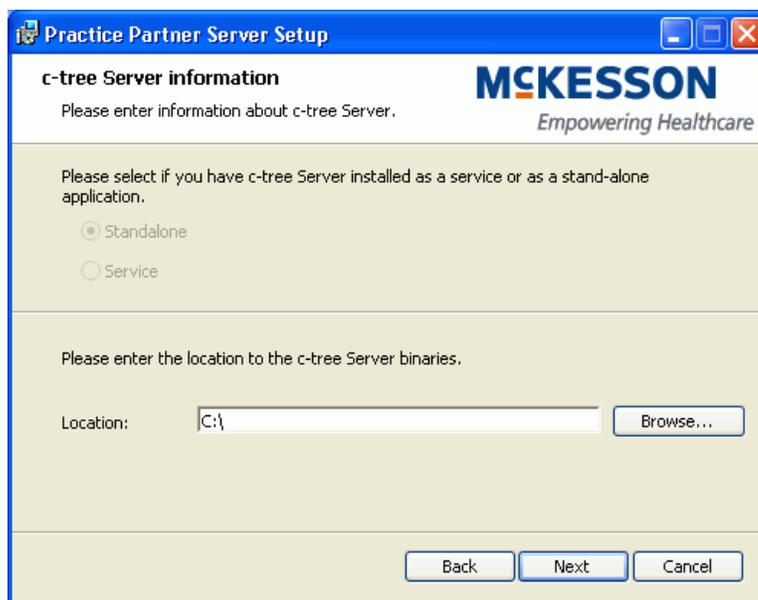

Figure 17. c-tree Server information screen

Before the installation, you must install c-tree Server and configure c-tree Server and clients for use with Practice Partner. You can skip this step if you already have c-tree Server installed. See "Installing and Administering a c-tree Server for Practice Partner" on page 61 for more information.

Important: You must run the FairCom Server Activation utility prior to the Practice Partner installation. See the "Running the FairCom Server Activation Utility" on page 64 for more information.

To set up c-tree Server:

1. In the Location field, enter or browse to the path to the c-tree Server binaries on your machine (for example, the standard path for c-tree Server is **C:\FAIRCOM\v7.12\c-treeserver\c-treeserver**).

2. Click **Next**. The Ready to install Practice Partner Server screen appears.

3. Click **Install**. The installation begins and the Installing Practice Partner screen displays the status of the installation.

   If you chose to activate your system to the Practice Partner Clearinghouse, a confirmation message appears if the activation is successful. If the activation fails, an error message appears explaining what caused the error. To retry the activation, click **Retry Activation**. If you want to activate later, click **Activate Later**. You can activate your system later by double-clicking **pmsi.ch.activation.exe** located in the \ppart directory.

4. When the installation is complete. click **Finish**.

   The installation places required registry keys in the registry of your application/file server. Reboot your server before production use of the Practice Partner application to ensure that these settings are enabled.

Client Workstation Installation

Complete Practice Partner client workstation installations directly on the client machines on which you want to install Practice Partner. You cannot install Practice Partner on the client workstations from the Server. If your site has access to Active Directory, you can use Active Directory to install Practice Partner on your client workstations. See "Using Active Directory® to Install Practice Partner on Client Workstations" on page 37 for step-by-step instructions.

Set up and customize Practice Partner before you install Practice Partner on the client workstations.

The client workstations must be running Windows Vista Business Edition; Windows 7 Professional, Ultimate, or Enterprise Edition; or Windows 8 Professional or Enterprise Edition.

To install the Oracle client, see "Install the Oracle Client" on page 58.

To install Practice Partner on a client workstation:

1. Log on to the client workstation as a user with administrative privileges.

2. Browse to the folder where you saved the Practice Partner Client setup.exe file. The executable file is downloaded from the eMDs Practice Support website, and the default locations to which the file is extracted are:

   - **C:\McKesson\11.0\ASWIN\Practice Partner Client** (Appointment Scheduler)

   - **C:\McKesson\11.0\MBWIN\Practice Partner Client** (Medical Billing)

   - **C:\McKesson\11.0\PRWIN\Practice Partner Client** (Patient Records)

3. Copy the Practice Partner Client setup.exe file to the client workstation.

4. Double-click **setup.exe**.

   If you have a Practice Partner - Client CD, insert it in the CD-ROM drive and complete the following steps.

   a. On the Windows Start menu, click **Run**.

   b. Enter **d:\setup.exe**, where **d** is the location of (or complete path to) the CD-ROM drive.

   c. Click **OK**.

Note: Do not use the **Run as administrator** option to start the installation.

---

5. Refer to the following table.

If you do not have this installed...	Then...
Crystal Reports v13	the Practice Partner Client Setup screen appears. *Figure 18. Practice Partner Client Setup screen* Click **Accept** to automatically install Crystal Reports v13 on your system and to continue with the Practice Partner installation.
Microsoft .NET Framework 4.0	NET 4.0 installs automatically on the client. After .NET is installed, it will determine if a reboot is required. If a reboot is required, a dialog box displays giving you the choice to reboot now or later. You must reboot before continuing with the installation. Once the reboot is complete, if the installation does not restart automatically, you should restart the installation.
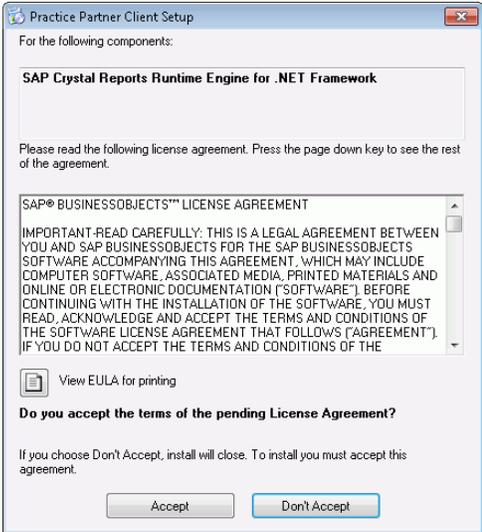
The Welcome to the Practice Partner Client Setup Wizard screen appears.

Figure 19. Practice Partner Client Setup Wizard screen

6. Click **Next**. The End-User License Agreement screen appears.

Figure 20. End-User License Agreement screen

7. Read the license agreement, select the **I accept the terms in the License Agreement** check box, and click **Next**. The Choose Setup Type screen appears.
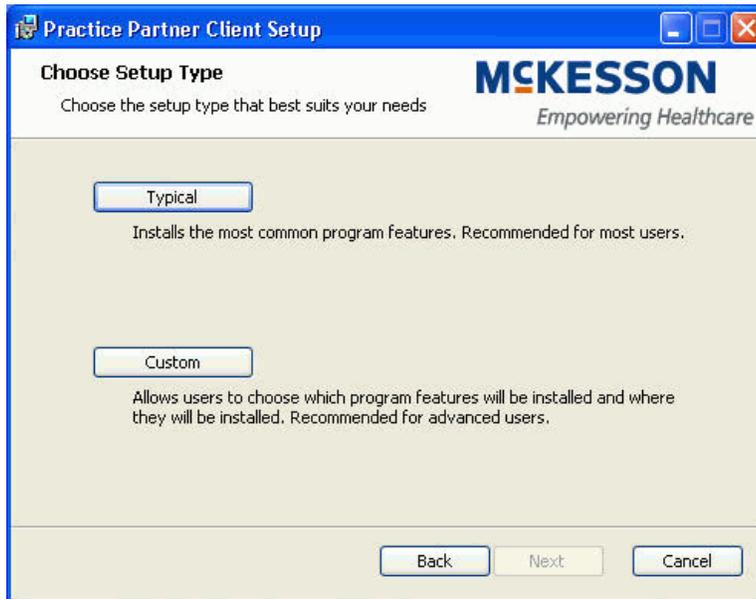

Figure 21. Choose Setup Type screen

8. Refer to the following table to determine the appropriate installation option.

| Button	Description
Typical	Click this button to install the most common program features.
	The client will be installed in **C:\Program Files\eMDs\Practice Partner** for 32-bit operating systems and in **C:\Program Files(x86)\eMDs\Practice Partner** for 64-bit operating systems.
	Skip to step 12 to complete the installation.
Custom	Click this button to choose which program features to install and where they will be installed. eMDs recommends that only advanced users select this option.
	Continue with step 9 to complete the installation.

9. The Custom Setup screen appears.
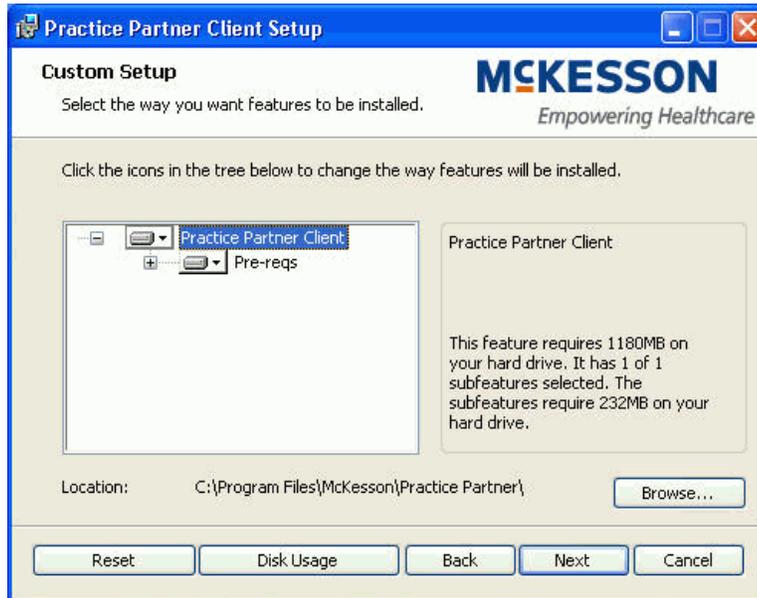
Figure 22. Custom Setup screen

The following table describes the items on this screen that you can use to set your preferences for the installation.

Item	Description
Plus signs in the tree structure	Click these to view all available features for which you can set preferences.
Feature icon	Click these to open a menu with the installation options that you can select for the feature. Click a menu item on the list to select it.

Item	Description
Feature	Click a feature to view the amount of disk space required to install the feature and its sub-features on your computer. Click the **Disk Usage** button to make sure that you have enough disk space available on the selected disk drive. The Disk Usage button accesses the Disk Space Requirements screen, which lists • all disk drives (volumes) you have on your computer. • the total disk size for each disk volume. • available space. • required space. • disk space that will remain available after you install the feature.
Browse button	Click this button to select a different destination folder for the Practice Partner client, and then click **OK**. The default location is **C:\Program Files\eMDs\Practice Partner** for 32-bit operating systems and **C:\Program Files(x86)\eMDs\Practice Partner** for 64-bit operating systems.
Reset button	Click this button to clear all of your selections, if needed.

10. Click **Next**. The Practice Partner Server Location Info screen appears.
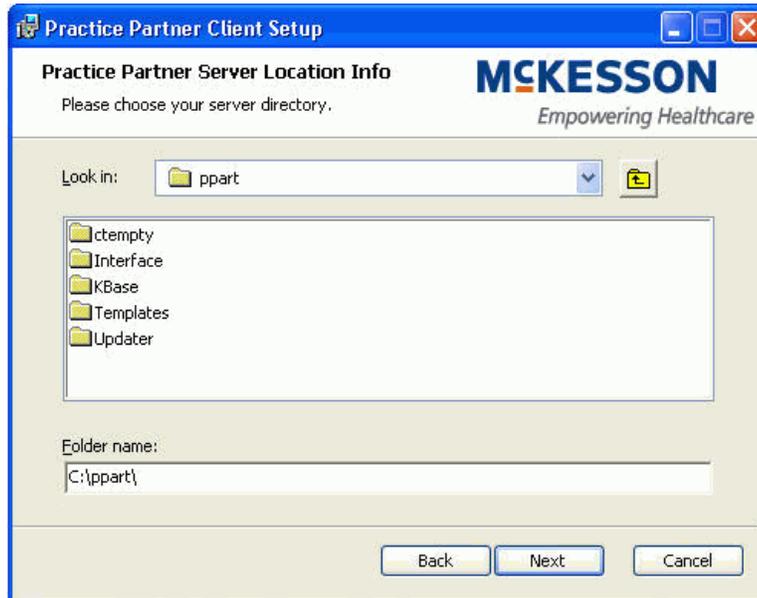
Figure 23. Practice Partner Server Location Info screen

11. Select the directory where the Practice Partner server is located (this is the directory you selected during the Practice Partner server installation). Click **Next**.

12. Click **Install**. The installation begins and the Installing Practice Partner Client screen displays the status of the installation.

13. When the installation is complete, click **Finish**.

14. Repeat this procedure for each client workstation on which you want to install Practice Partner.

Using Active Directory® to Install Practice Partner on Client Workstations

Installing Practice Partner on client workstations using Active Directory includes the following procedures.

1. Creating a shared drive

2. Creating a transform using Orca

3. Creating or editing an existing group policy

4. Restarting the client workstations

Creating a Shared Network Drive

Create a shared network drive with full access to the workstations on which you want to install the Practice Partner client. This drive also can be the shared drive on which you installed Practice Partner. If you choose to use an existing shared drive, you can skip this procedure as long as you give full access to the workstations on which you want to install the client.

Note: You must have administrative rights to create a shared directory.

To create a shared network drive:

1. Open **My Computer**.

2. Navigate to the drive you want to share.

3. Right-click on the hard drive icon and click **Sharing and Security**.

4. Select the **Share this folder** option. In the Share name field, enter a name by which you want to share this folder.

5. Click **Permission** and select the users on which you want to install the client.

6. Click **OK**. The Properties screen appears.

7. Click **Apply**.

8. On the shared drive, create a folder named **Software**.

   - **To create a folder, right-click My Computer and select New > Folder.**

9. Save the Practice Partner Client Installer (Practice Partner Client.exe) in the Software folder.

Creating a Transform for the Practice Partner Client Workstation Installer

Create a transform for the Practice Partner Client Workstation Installer and save it on the shared drive.

To create a transform for the Practice Partner Client Workstation Installer:

1. Open Orca.

2. In Orca, select File > **Open**. Browse to where Practice Partner Client.exe is saved in the Software folder on the shared drive.

3. Select Transform > **New Transform**.

4. In the left pane, click **LaunchCondition**.

5. Right-click **Installed OR VC8INSTALLED OR VersionNT < 600** and select **Drop Row**. A confirmation message displays.

6. Click **OK** to continue.

7. In the left pane, click **Property**.

8. Select the Value cell for **NETWORKINSTALL** and press **Enter**.

9. Change the value from 0 to **1**.

10. Upgrade only Select the Value cell for **EXISTINGPRWIN** and press **Enter**.

11. Change the value to the path of the existing 9.4.x client. For example, **c:\prwin**.

12. Upgrade only Select the Value cell for **LEGACYCLIENTUPGRADE** and press **Enter**.

13. Change the value to **1**.

14. Right-click anywhere in the property view (right pane) and select **Add Row**. The Add Row screen appears.

15. Click **Property** and enter **PPARTNETDIR** in the Property field.

16. Click **Value** and enter the UNC path for the \ppart directory on the server. For example, **\\dvtestdc\p\ppart**. When you are finished, click OK.

17. Select the Value cell for **PPARTMAPDIR** and press **Enter**. Change the value to what the client will map to the server as. For example: **P:\ppart**. When you are finished, click **OK**.

18. Select Transform > **Generate Transform**. The Save Transform As screen appears.

19. In the File name field, enter the desired name of the file (for example, **Client network install**) and save the transform on the shared drive.

Adding or Editing Group Policy Settings to Deploy the Client Installer

Add or edit an existing group policy using the Group Policy Management Console to add the installation package to your settings and deploy the package to your client workstations.

To add or edit a group policy to deploy the client installer:

1. Open the Group Policy Management Console.

2. Complete one of the following procedures.

To...	Then complete these steps...
add a group policy	1. Right-click on the Practice Partner folder and select **Create a GPO in this domain, and link it here**. The New GPO screen appears. 2. Enter the name of the new GPO (for example, **PP Software**) and select a source starter GPO from the drop-down menu. Click **OK**.
edit an existing group policy	• In the left pane, right-click the policy name and select **Edit**.

3. In the console tree, double-click Computer Configuration > Policies > Software Settings > **Software installation**.

4. In the console tree, right-click **Software installation** and select New > **Package**.

5. In the Open dialog box, click Practice Partner Clients, and then click **Open**.

6. In the Deploy Software dialog box, click Advanced, and then click **OK**.

   If you are upgrading Practice Partner Zoom, the IQmark^{TM} Digital ECG Module, or the IQmark^{TM} Digital Spirometer Module on your client workstations, click Assigned and then click **OK**. You then can restart your client workstations to upgrade to the latest version of Zoom.

7. In the Properties dialog box, click the **Modifications** tab.

8. Click **Add**. In the Open dialog box, browse to the transform file (.mst) you created in "Creating a Transform for the Practice Partner Client Workstation Installer" on page 38 and then click **Open**.

9. When you are finished, click **OK** and then close the Group Policy Management Editor.

Restarting Client Workstations to Complete the Practice Partner Client Installation

After you complete the steps in the previous sections, Active Directory requires you to restart your client workstations to upgrade to the latest version of Practice Partner. After you restart the workstations, users can log in to Practice Partner. The deployments of the installer as outlined in the previous steps may take a considerable amount of time. You may want to wait a while before restarting your client workstations.

Post-Installation Tasks

The following table lists general tasks to complete after installing Practice Partner.

Important: Make sure to review the Patch Release Notes documents for any necessary database changes. The Patch Release Notes documents are available on Salesforce.

Task	Description
Launch the application and log in	Confirm that the installation was properly completed and that the system is operational by launching the application and logging in.
Read the Practice Partner online help for information on configuring Practice Partner	For information on configuration Practice Partner for your practice, see the configuration topics in the Medical Billing, Patient Records, and Appointment Scheduler online help. You can access Practice Partner Help from any of the applications by clicking the Help button or by pressing F1 from any of the Practice Partner screens. Some of the options you can set up include: • Access levels • Operators • Demographic settings • Demographic guides • Ledger templates • Address defaults • Printers and printer fonts
Read the Release Notes	Refer to the Release Notes for descriptions of the new features.

Task	Description

Modify additional patient information types	Practice Partner is configured with four patient information types:
	
	• Alias
	
	• 1st Type
	
	• 2nd Type
	
	• 3rd Type
	
	These types are placeholders, and you should modify them to meet your needs. The **[Demographics]** section of the ppart.ini file contains the following line:
	
	`AddInfoType=Alias,1st Type,2nd Type,3rd Type`
	
	You can change these type or add additional types. For example, you might have:
	
	`AddInfoType=Alias,Summer Home,Winter Home,Grandmother's Home`
	
	Be careful about changing or deleting the types once you start using Practice Partner. Once data has been entered for a type, the data can be retrieved only if that type still exists in the ppart.ini file.

Task	Description
Update the properties for your network card (NIC)	In the properties of your network adapter, clear the **Internet Protocol Version 6** check box; otherwise, you may experience slowness in your application.
Install patches	Complete the following steps to avoid having to install all pre-2017 patches. 1. Install ALL 2017 patches in order, making sure to OMIT the 04/05/2017 Client/Server patches until there are no more 2017 patches left. **NOTE**: All of the pre-2017 patches will be in the list. Do not be alarmed - this is normal. 2. Once there are only the 04/05/2017 patches left, install both Client/Server patches, leaving all the pre-2017 patches uninstalled. 3. Once the Update Manager reboots after installing patches, all of the post-04/05/2017 patches will be available as you now are pointing to another bucket. You then can install all the remaining patches in order through the current patch. If you have questions, contact Practice Partner Support.

Upgrading to Practice Partner Release 11.2

Once you have Practice Partner Release 11.0 installed, you must upgrade to release 11.1, then to release 11.2.

Complete the following steps.

Install patches to upgrade to 11.1

1. Install ALL of the 2017 patches in order, starting with the 2/2017 cumulative patch, making sure to OMIT the 4/5/2017 client/server patches until there are no more patches left.

    NOTE: All of the other pre-2017 patches will be on the list. Do not be alarmed; this is normal.

2. When there are only the 4/5/2017 patches left, install both client/server patches, leaving all the pre-2017 patches uninstalled.

3. Once the Update Manager reboots after installing patches, all of the post-4/5/2017 patches will be available, as you now are pointing to another bucket. You then can install all the remaining patches through current.

    NOTE: eMDs recommends that you install the server patches first in order one-by-one post-4/5/2017 patch so that you can verify that the database changes are made without error. The error will be noticeable in the command prompt window but also is recorded in the ppart\ligs\MaintenanceEngine.log text file. If you have an error, contact Technical Support.

4. Once the server has updated, you can accept all other patches together by selecting all.

NOTE: Be aware that there are release notes for all patches after GA release; this database change must be done on all NEW installs. Refer to the *Practice Partner Resolved Issues - 3rd Quarter 2015* document for these instructions. If you are an Oracle or SQL user, refer to the SocialKB article titled 'TFS 167576 SetHealthMaintDataUID for SQL or Oracle' to obtain scripts to resolve this.

If you have questions, please contact Technical Support.

Upgrade to 11.2

Upgrade to Practice Partner Release 11.2 by following the instructions in *Practice Partner Upgrade and Configuration Guide* for Release 11.2.

This upgrade guide is available on the eMDs Practice Support website.

Appendix A - Creating a Microsoft SQL Server Database for Practice Partner

The following table indicates whether this appendix applies to your situation.

What database are you using?	Appendix to use to create your database:
Microsoft SQL Server	This appendix.
Oracle	"Creating an Oracle Database for Practice Partner" on page 53.
c-tree	"Installing and Administering a c-tree Server for Practice Partner" on page 61.

This appendix provides step-by-step instructions for creating a new Microsoft® SQL Server® database for Practice Partner.

You must create a new database before installing Practice Partner.

Technical assistance

If you need technical assistance or have questions regarding these instructions, contact Practice Partner Technical Support at https://practicesupport.emds.com or by calling the number appropriate to your type of organization. Follow the prompts and listen to all available choices as menu options may change.

- Independent Support: 1-855-IND-TEAM (463-8326)
- VAR Support: 1-855-VAR-TEAM (827-8326)
- Enterprise Support: 1-855-ENT-TEAM (368-8326)

Installing Microsoft SQL Server Software

You must install Microsoft SQL Server software on your database server before creating a database for Practice Partner.

Before installing the software, complete a full system backup of your current production environment. The backup must include everything needed to recreate your production environment. Do not proceed to the following steps until your backup is complete and verified.

When you install SQL Server, you can use the default installation options in most circumstances, with the following exceptions.

- For database components, select the **Database Engine services** and the **Management Tools**.

- Select **Mixed Mode Authentication** for the Authentication Method.

See your Microsoft SQL Server documentation for SQL Server installation instructions.

Creating the Database Directory Structure

To create the Practice Partner database, you must build an initial directory structure to house the data files and log files. The example below depicts a standard single drive installation of the database and the necessary file structure.

eMDs' recommended SQL Server configuration is to place data files and log filed on different logical drives (arrays, LUNs, or disks). For example, **F:\PROD\DATA** and **G:\PROD\LOG**. The following steps follow this recommendation.

To create the database directory structure:

1. Open Windows Explorer and navigate to the drive where your database is located (for example, F:\).

2. Create a PROD folder on the database drive.

    a. Create a new folder by right-clicking a blank area in a folder window or on the desktop, pointing to New, and clicking **Folder**.

    b. Rename the default folder to **PROD** and press **Enter**.

3. Create a **DATA** folder in the **PROD** folder.
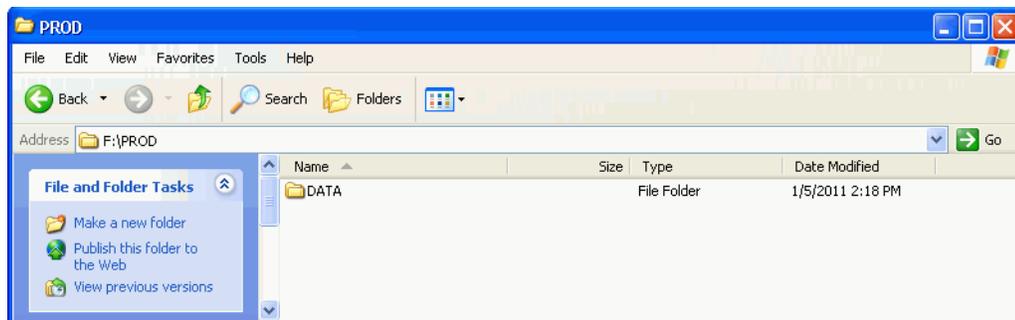
4. Navigate to your log drive (for example, G:\).

5. Create a PROD folder on the log drive.

    a. Create a new folder by right-clicking a blank area in a folder window or on the desktop, pointing to New, and clicking **Folder**.

    b. Rename the default folder to **PROD** and press **Enter**.

6. Create a **LOG** folder in the **PROD** folder.
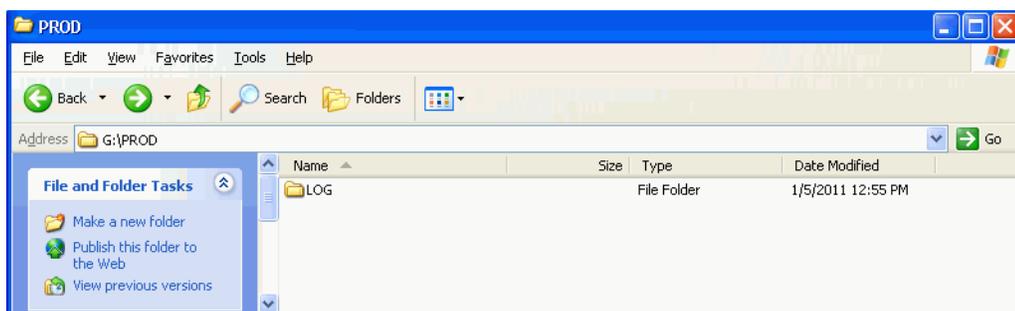
7. Close Windows Explorer.

Creating the Empty Database

Complete the following steps to create an empty database.

To create a new database:

1. Log on to the server as an administrator.

2. Select Start > Programs > Microsoft SQL Server > **Microsoft SQL Server Management Studio**. The Connect to Server screen appears.

Figure 24. Connect to Server screen

3. In the Server name field, enter or select the server name. Click **Connect**. The Microsoft SQL Server Management Studio screen appears.
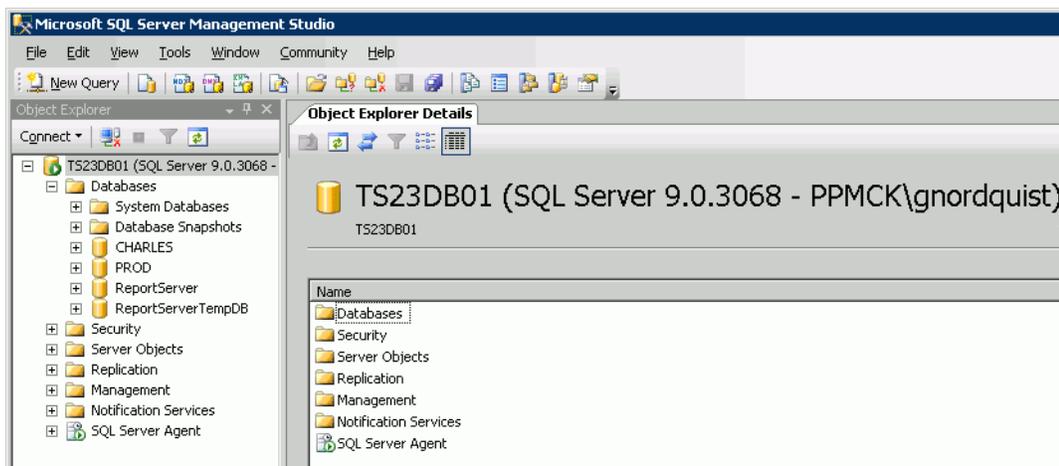
Figure 25. Microsoft SQL Server Management Studio screen

4. In the Object Explorer area on the left side of the window, expand the **Databases** folder.

5. Right-click the Databases folder and select **New Database**. The New Database screen appears.
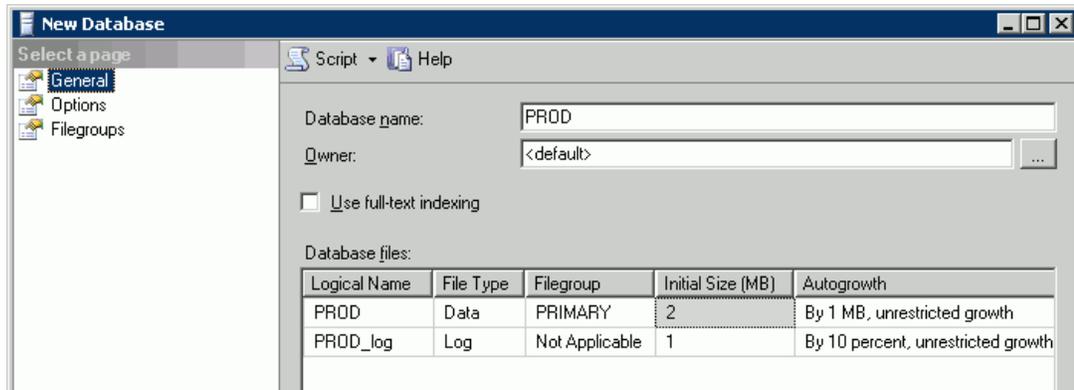
Figure 26. New Database screen

6. In the Database name field, enter the preferred name of your SQL database. As a general rule, **PROD** is the default name for the Production copy of the database.

7. In the Database files section, scroll to the right until you reach the **Path** heading. Change the path of the related database files as shown below based on the directory structure of the system.

   eMDs recommends that you place the **DATA** folder and the **LOG** folder on different disks. For example, **F:\PROD\DATA** and **G:\PROD\LOG**.
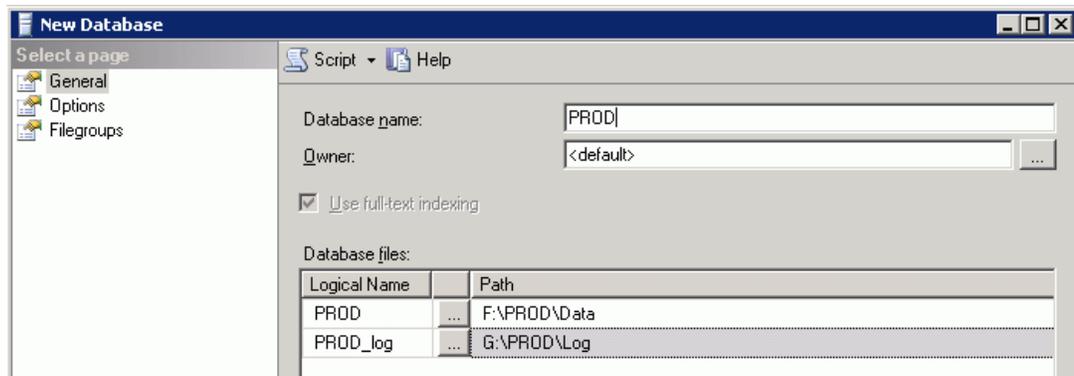
Figure 27. New Database screen

8. Click **OK** and wait for the database creation process to complete.

   When the process is complete, the database name is listed under the Object Explorer database section on the Microsoft SQL Server Management Studio screen.

Creating the Practice Partner File Groups

After you create the database, you must create the Practice Partner file groups. This requires running the SQL110 script file located in the Oracle SQL folder on the Practice Partner - Server CD.

To run the SQL110.sql script:

1. Highlight the database name and select File > Open > **File**. The Open File screen appears.
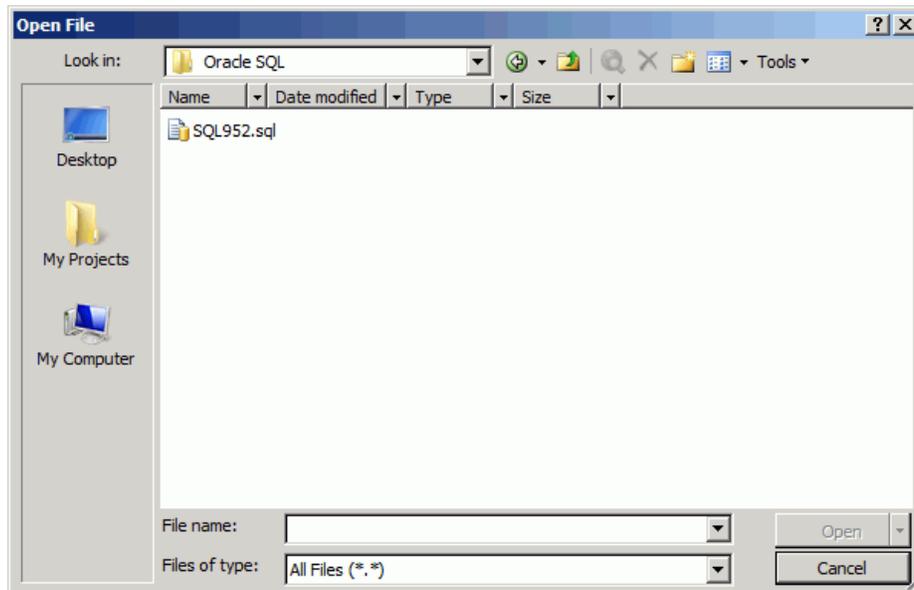
Figure 28. Open File screen

2. Navigate to the Oracle SQL folder on the Practice Partner - Server CD, select the SQL110.sql script, and click **Open**. The initial creation script for the Practice Partner database loads.

3. Replace **<password>** with the password you want to use for your SQL Server instance. This is the password you will enter during the Practice Partner Application Server installation. The username you will enter during the installation is **PPINSTALL**. See "Setting up Microsoft SQL Server" on page 26 for more information.

4. Replace ***DRIVE*** with the appropriate drive letter for the database files and replace ***DBNAME*** with the appropriate name of the database that you created in step 6 in "Creating the Empty Database" on page 49.

   a. Select Edit > Find and Replace > **Quick Replace**. The Find and Replace screen appears.

   b. Enter ***DBNAME*** or ***DRIVE*** in the **Find what** field and enter the name of the database or drive letter in the **Replace with** field. Use the Find Next, Replace, and Replace All buttons to find and replace the database name and drive.

5. Click **Execute** and wait for the script to complete.

6. You now can install Practice Partner. Continue with "Back up your Servers" on page 10.

Appendix B - Creating an Oracle Database for Practice Partner

The following table indicates whether this appendix applies to your situation.

What database are you using?	Appendix to use to create your database:
Microsoft SQL Server	"Creating a Microsoft SQL Server Database for Practice Partner" on page 45
Oracle	This appendix.
c-tree	"Installing and Administering a c-tree Server for Practice Partner" on page 61.

This appendix provides step-by-step instructions for creating a new Oracle® database for Practice Partner.

You must create a new database and install and configure the Oracle client on your workstations before installing Practice Partner.

Technical assistance

If you need technical assistance or have questions regarding these instructions, contact Practice Partner Technical Support at https://practicesupport.emds.com or by calling the number appropriate to your type of organization. Follow the prompts and listen to all available choices as menu options may change.

- Independent Support: 1-855-IND-TEAM (463-8326)

- VAR Support: 1-855-VAR-TEAM (827-8326)

- Enterprise Support: 1-855-ENT-TEAM (368-8326)

Creating a New Database

Before you create a new Oracle database, complete a full cold backup of your Oracle database server. This backup must include everything you need to re-create your production environment. Do not continue until the backup is complete and verified.

To create a new Oracle database:

1. Install the Oracle 11g Release 2 software on your server. eMDs recommends Oracle 11g version 11.2.0.4 or later.

2. Create an Oracle database using the Oracle 11g Database Configuration Assistant tool. See your Oracle documentation for more information on creating an Oracle database.

    When you create the database, configure the following:

On this screen...	Do this...
Step 1 - Database Operations	Select the **Create a Database** option.

On this screen...	Do this...
Step 8 - Recovery Configuration	Change the default value for Flash Recovery Area Size to **51200 M Bytes** (or larger if possible; see bulleted items below for best sizing). eMDs recommends that you select a value for the flash recovery area that is large enough to hold a copy of all of your control files, online redo logs, the archived redo log files, and possible backup files needed to recover your database. • The larger the flash recovery area, the more useful it becomes; however, eMDs recommends not selecting a value larger than your disk partition size or ASM disk group size. • Setting the flash recovery area limit smaller than your disk partition size or disk group size allows you to use the remaining disk space for other purposes and not to dedicate a complete disk for the flash recovery area. • If possible, use the **Browse** button to select a dedicated file system partition or an ASM disk group to place the flash recovery area. The optimum recovery area size depends on the interval time between two processes (scheduled by the site) that purge both backed-up archive log files and obsolete backup files according to redundancy policy.
Step 8 - Recovery Configuration	Select the **Enable Archiving** check box.

On this screen...	Do this...
Step 10 - Initialization Parameters	1. Click the Character Set tab and select the **Choose from the list of character sets** option. Select **WE8ISO8859P1 - ISO 8859-1 West European** from the drop-down list.
	2. Click the **All Initializations Parameters** button. The All Initializations Parameters screen appears.
	3. Click **Show Advanced Parameters**. Scroll to **db_files** and change the value from **200** to **600**. Scroll to **db_securefile** and change the value from **PERMITTED** to **ALWAYS**.
Step 13 - Database Storage	Modify the path for Oracle datafiles, control files, redo logs, and archive logs to reflect your system.

4. Log into the Oracle database you just created as a system user and run the Oracle tablespace script (located in the Oracle SQL folder on the Practice Partner - Server CD) to create tablespace.

To run the Oracle tablespace script:

a. With a text editor such as Notepad, open the **ORACLE110.sql** file located in the Oracle SQL folder on the Practice Partner - Server CD.

b. Replace ***DRIVE*** with the appropriate drive letter for the database files. eMDs recommends that you use your database name in the file path (for example, **e:\database name**).

If your Oracle database uses Automatic Storage Management (ASM), replace ***DRIVE*** with the ASM disk group name (for example, **+DISKGROUP**).

To find and replace the drive:

a. Select Edit > **Replace**. The Replace screen appears.

b. Enter ***DRIVE*** in the **Find what** field and enter the drive letter in the **Replace with** field.

c. Click **Replace All**.

c. Log in to SQL*Plus on the database server as the user **sys**.

From a Windows or Unix command prompt, complete the following steps.

a. Enter **sqlplus sys/<password> as sysdba**, where **<password>** is the user sys password

b. Press **Enter**.

c. Enter **@ORACLE110.sql** and press **Enter**.

SQL*Plus reports whether each tablespace was created successfully.

Install the Oracle Client

You must install the Oracle Database 11g Release 2 Client for Microsoft Windows (32-bit) on your Practice Partner server and each client workstation on which you want to run Practice Partner. You also must install the Oracle Database Client on any interface computer (server or workstation). See your Oracle documentation for instructions.

Oracle Client Configuration

After you install the Oracle 11g Release 2 Client software on each client workstation on which you want to run Practice Partner, make sure you have the correct Oracle character set in the system registry and that your Oracle home environment variable is pointing to your preferred Oracle client. See your Oracle documentation for Oracle installation instructions, and complete the steps below to make sure the following configurations are set for your Oracle 11g R2 client.

After you verify the configurations below, you can install the Practice Partner client. See "Client Workstation Installation" on page 31 for step-by-step instructions. The Practice Partner client installation automatically sets up the Oracle client connection. A new entry in the tnsnames.ora file will appear after the installation.

To confirm you have the correct Oracle character set in the system registry:

1. Select Start > **Search**.

2. Enter **regedit** and click **Search**.

3. Double-click the **regedit.exe** file. The Registry Editor appears.

4. Refer to the following table to complete this step.

If you have a...	Then select...
32-bit machine	**HKEY_LOCAL_MACHINE > SOFTWARE > ORACLE > *ORACLE_HOME* entry** (the exact entry is different for each site).
64-bit machine	**HKEY_LOCAL_MACHINE > SOFTWARE > Wow6432Node > ORACLE > *ORACLE_HOME* entry** (the exact entry is different for each site).

5. Make sure that the NLS_LANG entry is **AMERICAN_AMERICA.WE8ISO8859P1**. If you need to update the entry, complete the following steps.

   a. Right-click the NLS_LANG entry and select **Modify**. The Edit String screen appears.

   b. In the Value data field, replace the existing entry with **AMERICAN_AMERICA.WE8ISO8859P1**.

6. On your client machine, make sure that your Oracle home environment variable is pointing to your preferred Oracle client.

   a. Select Start, right-click My Computer, and click **Properties**. The System Properties screen appears.

b. On the Advanced tab, click **Environment Variables**. The Environment Variables screen appears.

c. In the System Variables list, scroll to **Path entry**. Make sure the path entry points to your preferred Oracle client's path.

Appendix C - Installing and Administering a c-tree Server for Practice Partner

The following table indicates whether this appendix applies to your situation.

What database are you using?	Appendix to use to create your database:
Microsoft SQL Server	"Creating a Microsoft SQL Server Database for Practice Partner" on page 45.
Oracle	"Creating an Oracle Database for Practice Partner" on page 53.
c-tree	This appendix.

This appendix describes how to install and administer c-tree Server for Practice Partner.

The primary advantage to switching to c-tree Server is reliability. Instead of every Practice Partner user opening and writing to a data file, each file is opened only once by the c-tree Server process. The Practice Partner clients communicate with c-tree Server, which then writes the data to the files.

You must install c-tree Server and run the FairCom Server Activation Utility before installing Practice Partner.

Installing c-tree Server for Practice Partner

To install c-tree Server for Practice Partner:

1. On the c-tree Servers explorer screen, click the **Install c-tree Servers** link.

2. Click the Install button next to **Windows NT/2000/XP (Intel)**.

Figure 29. Windows Systems screen

3. Select **setup.exe**. The Welcome to c-tree Server V7 for Windows Setup screen appears.

4. Click **Next**. The FairCom Server Licensing Agreement Reminder screen appears.

5. Click **Yes**. The Choose Destination Location screen appears.

6. Accept the default destination folder or specify the drive and path for the server files. You can use the Browse button to navigate to the folder. Click **Next**. The FairCom Server Configuration screen appears.
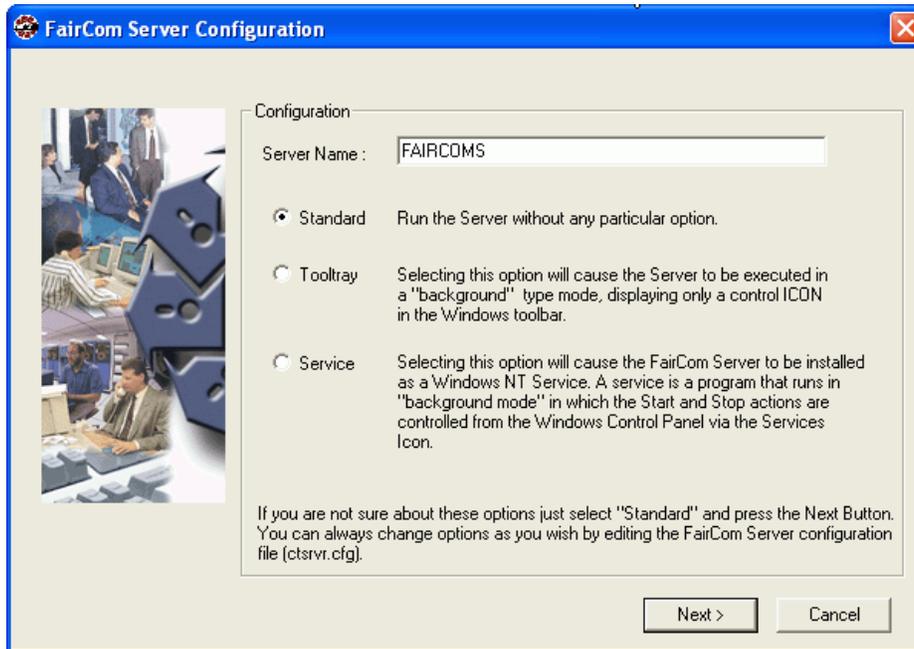
Figure 30. FairCom Server Configuration screen

7. In the Server Name field, enter a name for the server. If you are unsure what name to enter, leave the default **FAIRCOMS**. You can always change the name later by editing the server configuration file (ctsrvr.cfg).

8. Select the **Standard** option and click **Next**.

9. When the server files are installed, click **Finish**.

Running the FairCom Server Activation Utility

You must run the FairCom Server Activation Utility prior to installing Practice Partner. Complete the steps below to run the utility.

To run the FairCom Server Activation Utility:

1. Double-click **fcactvat.exe**, located at C:\Faircom\v7.12\c-treeServers\c-treeServer. The FairCom Server Activation Utility screen appears.

Figure 31. FairCom Server Activation Utility screen

2. Enter the serial number and activation key provided by Practice Partner.

   When you enter the serial number, do not enter the leading **88**. For example, if your serial number is **88123456**, enter **123456**.

3. Click **Activate**.

4. Click **OK** to confirm that you have activated the server.

Appendix D - Downloading License Files

You will not receive a License disk. Instead, you must download the product license from the eMDs Practice Support website. New license files are required for each new version of Practice Partner.

To download your license files:

1. Go to the eMDs Practice Support website at https://practicesupport.emds.com.

2. Enter your eMDs Practice Support website username and password.

3. Click the **Login** button.

4. Under **Quick Links** on the left side of the eMDs Practice Support website, click the **Downloads & License Files** link.
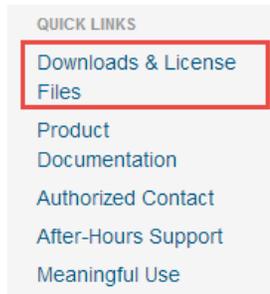
Figure 32. eMDs Practice Support website - Quick Links

The Product Downloads and License Files page appears.

Figure 33. Product Downloads and License Files page

5. To download the current (11.0) license file, click the drop-down arrow on the **Download Current Version** button and select **Download License File** from the menu.

To download the previous (9.5.2) license file, click the drop-down arrow on the **Download Current Version** button and select **Download Previous License** from the menu.

Figure 34. Product Downloads and License Files page

The license file will be downloaded immediately to your machine.

Installing your License Files for Practice Partner

Read the following instructions carefully.

If you are...	Then refer to...
installing or upgrading Practice Partner to a new version	.
changing the number of licensed users of Practice Partner	.

Download your license files before you begin your installation of Practice Partner.

To install Practice Partner:

1. Create a License folder on the drive that the ppart folder is on (typically, the P:\ drive).

   a. Go to Start > All Programs > Accessories > **Windows Explorer**.

   b. Browse to the drive that the ppart folder is on.

   c. Create a new folder by right-clicking a blank area in a folder window or on the desktop, pointing to New, and then clicking **Folder**.

   d. Rename the default folder to **License** and press **Enter**.

2. Save the files attached to the e-mail to the License folder (usually P:\License). One of the files is named **pplic.txt**. If this file doesn't exist (some e-mail programs remove this file), save the other file in the License folder and rename it to **pplic.txt**.

3. Begin your installation of Practice Partner. During the installation, you will be prompted to browse to the License folder where your license files are located.

To change the number of licensed users:

Prerequisites: You must know the path to your Practice Partner data files directory (typically p:\ppart) and all users must exit all Practice Partner applications.

1. Create a License folder on the drive that the ppart folder is on (typically, the P:\ drive).

   a. Go to Start > All Programs > Accessories > **Windows Explorer**.

   b. Browse to the drive that the ppart folder is on.

   c. Create a new folder by right-clicking a blank area in a folder window or on the desktop, pointing to New, and then clicking **Folder**.

   d. Rename the default folder to **License** and press **Enter**.

2. Save the files attached to the e-mail to the License folder (usually P:\License). One of the files is named **pplic.txt**. If this file doesn't exist (some e-mail programs remove this file), save the other file in the License folder and rename it to **pplic.txt**.

   a. Go to Start > **Run**.

   b. Enter the path to your Practice Partner data file directory followed by **\SETUSER2**. For example, if your data is located in p:\license, enter:

      p:\ppart\setuser2 p:\license

3. Click **OK**.

Appendix E - Auto-Generate Demographic IDs

You can configure Practice Partner to automatically generate unique demographic identification numbers. This means that each time you add a new account, guarantor, or patient, Practice Partner automatically assigns a unique ID based on the settings you have selected.

To set up demographic ID settings and turn on the auto ID feature:

1. Open the **ppart.ini** file (typically located in p:\ppart).

2. In the **[DemographicIDs]** section, indicate

   - **the number of characters for each ID (the ID's length).**

   - **the increment between each unique ID.**

   - **whether each ID should have a prefix (for example, enter A for account IDs, G for guarantor IDs, P for patient IDs, and M for message IDs).**

3. Open a command prompt.

   a. Click Start > **Run**.

   b. In the Open field, enter **cmd** and click **OK**.

4. The following table describes what to enter at the command prompt.

To turn on the automatic demographic IDs feature for...	Then enter...
account IDs	**p:\ppart\plugnxid auto A** and press **Enter**.
guarantor IDs	**p:\ppart\plugnxid auto G** and press **Enter**.
patient IDs	**p:\ppart\plugnxid auto P** and press **Enter**.
message IDs	**p:\ppart\plugnxid auto M** and press **Enter**.

Appendix F - Header Repair Utility

This appendix applies to you ONLY if you use a c-tree Server database.

The Header Repair utility fixes c-tree files that need to be reset when the c-tree Server process ends unexpectedly (as in the server does not close properly). C-tree Server files must be set to a certain value for the files to be opened. These files will not reopen if the c-tree Server process closes unexpectedly. This utility rewrites the header of the files that need to be reset with the header of another file. You may reopen the server once all files that need to be fixed have been reset by the utility.

To use the Header Repair utility:

1. Open Windows Explorer and browse to the ppart directory.

2. Double-click **fixhdr.bat**.

   You also can start the utility by opening a DOS prompt and navigating to the drive where the ppart directory is located. Enter **fixhdr.bat** and press **Enter**.

   The Header Repair utility starts.

   While the utility runs, you may see the error message **error open : call=043** in the DOS prompt. This message displays when the utility is trying to correct a .pht file. This message does not affect the utility's performance and can be ignored.

3. When the utility completes, restart the database.

4. Restart c-tree Server.

Appendix G - Practice Partner Supplemental Functionality

The following tables list the product name, the product name as seen under the Product column on the eMDs Practice Support website, and the name of the downloaded installer files.

Patient Records, Appointment Scheduler, and Medical Billing

The PRWIN, MBWIN, and ASWIN products all are the same software. You need to download only one of these from the eMDs Practice Support website. The appropriate options are installed based on the contents of your license file. There is no content download specific to the Order Entry product. If your organization is licensed for Order Entry, it is included as part of the Patient Records installation.

Practice Partner Product Name	Product Name	Installer Name (Server/ Client)
Patient Records	PRWIN	Server: setup.exe Client: setup.exe
Medical Billing	MBWIN	Server: setup.exe Client: setup.exe
Appointment Scheduler	ASWIN	Server: setup.exe Client: setup.exe

Practice Partner Add-on Products

Add-on Product Name	Add-on Product Name	Add-on Installer Name
AMA Code Updater	CPT-ICD9	AMA Code Updater v11.0.7571.msi
Brentwood EKG module	EKG	Brentwood EKG v11.0.7571.msi
Brentwood Spirometry module	SPIRO	Brentwood Spiro v11.0.7571.msi
Clinical Tools	ClinicalTools	Clinical Tools - Drug Interaction.msi setup.exe Clinical Tools - Templates v11.0.7571.msi
Instant Medical History	IMH	TextLoadScheduler.exe
Patient Education	PATEDU-5	Patient Education v11.0.7571.msi
Practice Partner Zoom	Zoom	PPZoom v11.0.7571.msi
Updox	Updox	Refer to the Updox chapter in the *Practice Partner Add-ons Configuration and Installation Guide*.
XFire - Demographics Interface XFire - Maintenance Interface	XFire - Demographics XFire - Maintenance	XFire - Demographics v11.0.7571.exe XFire - Maintenance v11.0.7571.exe

Practice Partner Interfaces

Interface Product Name	Interface Product Name	Interface Installer Name
PerSe Billing Bridge	PPC-PerSeBillingBridge	PerSe Billing Bridge v11.0.7571.msi
PPConnect	PPConnect	PPConnect v11.0.7571.exe
PPConnect - Billing Bridge	PPC-Billing Bridge	Billing Bridge v11.0.7571.msi
PPConnect - GE EKG	PPC-GEEKG	GE EKG v11.0.7571.msi
PPConnect - Immunization Registry	PPC-Immunization	ImmunizationRegistry v11.0.7571.msi
PPConnect - LabCorp	PPC-LabCorp	LabCorp v11.0.7571.msi
PPConnect - LabCorp Billing Bridge	PPC-LabCorpBridge	LabCorp Bridge v11.0.7571.msi
PPConnect - Paragon	PPC-Paragon	Paragon v11.0.7571.msi
PPConnect - RelayHealth	PPC-RelayHealth	RelayHealth v11.0.7571.msi
QuestToro Billing Bridge	PPC-QuestToro	Quest Toro Billing Bridge v11.0.7571.msi

Practice Partner Templates

Template Collection Name	Name	Extraction File Name
Practice Partner Cardiology Specialty Template Collection	Templates-Cardio	Templates-Cardio07-09.exe
Practice Partner Chiropractic Template Collection	Templates-CHIRO	Templates-CHIRO03-10.exe
Practice Partner Dermatology Specialty Template Collection	Templates-Derm	Templates-Derm05-09.exe
Practice Partner Endocrinology Specialty Template Collection	Templates-Endo	Templates-Endo05-09.exe
Practice Partner Gastroenterology Specialty Template Collection	Templates-Gastro	Templates-Gastro12-08.exe
Practice Partner Neurosurgery Specialty Template Collection	Templates-NS	Templates-NS01-09.exe
Practice Partner GYN Specialty Template Collection	Templates-OBGYN	Templates-OBGYN02-09.exe
Practice Partner Orthopaedics Specialty Template Collection	Templates-Ortho	Templates-Ortho02-09.exe
Practice Partner Podiatry Specialty Template Collection	Templates-Podiatry	Templates-Podiatry08-10.exe
Practice Partner Urology Specialty Template Collection	Templates-Urology	Templates-Urology02-09.exe

If your organization is registered to receive the Practice Partner Templates, they will display in your list of registered products on the Product Downloads and License Files page.

Are you a new site?	Then you must download the templates...
yes	when you download the rest of your Practice Partner software.
no	only when there is an update to a template.

After you have downloaded and extracted your registered Template Sets, refer to the corresponding Practice Partner Template documentation for more information.

To download and extract your templates from the eMDs Practice Support website:

1. Click the appropriate template link on the Product Downloads and License Files page. The Product Information page appears.

2. Click the **Download Updates** link. The Download Update for page appears.

3. Under the **Current Version** section, click the template link. The File Download - Security Warning dialog box appears.

4. Click the **Save** button.

5. Choose a download location on your hard disk and click the **Save** button. The download process begins. When the process is complete, the Download Complete dialog box appears.

6. Do one of the following:

   - **Click the Run button.**

   or

   a. Click the **Open Folder** button to open the folder where the system saved the download.

   b. Double-click the .exe file.

   The WinZip Self-Extractor dialog box appears.

7. Choose a location on your hard disk and click the **Unzip** button.

8. The system extracts the files to the selected location. If the files extracted successfully, a confirmation message appears. Click the **OK** button.

9. Repeat the steps above to download all of your template products from the eMDs Practice Support website.

Appendix H - Troubleshooting

This appendix offers solutions to some common issues.

Microsoft .NET Framework

In most cases, the Practice Partner installer will automatically detect if you have the Microsoft .NET Framework 4.0 framework pre-installed; if the framework is not installed, the installer will install it for you automatically. However, if an error occurs when the installer attempts to install the Microsoft software, the following message may appear:

> An error occurred while installing system components for Practice Partner Server. Setup cannot continue until all system components have been successfully installed.

If this message appears, you must manually install Microsoft .NET Framework 4.0 before proceeding with the installation. You can download Microsoft .NET Framework 4.0 from the Microsoft Download website.

NOTE: If you are using Microsoft Windows 2008 R2, you can add Microsoft .NET Framework 4.0 as a feature.

Microsoft Script Runtime was not found

If you receive the **Microsoft Script Runtime was not found** error after installing Practice Partner, complete the following steps.

If your site uses a...	Complete these steps...
64-bit machine	1. Open a command prompt. 2. Enter **C:\windows\syswow64\regsvr32.exe C:\windows\system32\scrrun.dll** and press **Enter**.
32-bit machine	1. Open a command prompt. 2. Enter **C:\windows\system32\regsvr32.exe C:\windows\system32\scrrun.dll** and press **Enter**.

PP_DB_APP error message (Oracle sites only)

If your site uses Oracle, the Practice Partner installation generates a password. If the generated password begins with a number, an error similar to the following appears:

> PP_DB_APP user cannot be created due to its password.

If you receive this message, cancel the installation and restart the installer.

Reinstalling the EMR

Reinstalling the EMR for Practice Partner Server may result in the services not starting. If this happens, obtain a backup copy of the interop.datapassageLib.dll, drop it into ppart, and then try restarting the services. If you already have rolled back before you attempt another install, have that file ready to drop in as soon as the ppart files are being populated during the install.

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