



## Preparing Your Server for an MDsuite Installation

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## 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.

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.
- A transmission server, if required, meets system requirements and has a supported operating system installed, with a working modem and phone line installed. A transmission server is required when the office is sending claims to any payer or clearinghouse over a point-to-point dialup connection.
- IIS is installed on the application server and on the transmission 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 7.0 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, and any conflicting software has been completely uninstalled from target workstations and servers.

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## 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](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 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**
  - **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**

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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.

### 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**.

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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**

### Windows Vista:

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** and click the **+** next to **World Wide Web Services** to expand the feature tree.
6. 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**.
7. Click the **+** sign next to **Common HTTP Features** and check off the following items:
  - **Default Document**
  - **Directory Browsing**
  - **HTTP Errors**
  - **Static Content**
8. Click the **+** sign next to **Health and Diagnostics** and check off the following items:
  - **HTTP Logging**
  - **Logging Tools**
  - **Request Monitor**
  - **Tracing**
9. Check the box next to **Performance Features**.
10. Click the **+** sign next to **Security** and check off the following items:
  - **Request Filtering**
  - **URL Authorization**
  - **Windows Authentication**
11. Click **OK** to begin installation of the features. If prompted, provide the Windows Vista installation media.

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12. Install and enable the **WebDAV** extensions for Internet **Information Services (IIS)**. Refer to: <http://learn.iis.net/page.aspx/350/installing-and-configuring-webdav-on-iis-7/> for information on how to do this.

### **Windows XP Professional:**

1. Click on **Start** and select **Control Panel**.
2. Launch **Add or Remove Programs** and click on the **Add/Remove Windows Components** button on the left.
3. The **Windows Components Wizard** dialog appears. Click on **Internet Information Services (IIS)** and then click **Details**.
4. Select only **Common Files, Internet Information Services Snap-In, SMTP Service, and World Wide Web Server**. Do not check any other boxes.
5. Click **OK** to close the **Internet Information Services (IIS)** dialog.
6. Click **Next** to proceed with installation. Insert your Windows XP Professional installation media if prompted.
7. When the install is complete, click **Finish**.

### **Step 2: Installing Microsoft SQL Server**

Microsoft SQL Server must be installed prior to installing the MDSuite Application Server Software. While most clients deploy Microsoft SQL Server onto the same computer that they will install the MDSuite Application Server Software, a separate database server with Microsoft SQL Server installed is also fully supported. Keep in mind that the procedures for installing your version of SQL Server may differ slightly than the steps outlined below.

#### **Installing SQL Server 2008**

1. 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.
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 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 **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.
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**
  - **SQL Server Replication**
  - **Full-Text Search**
  - **Client Tools Connectivity**

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- **Client Tools Backwards Compatibility**
  - **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 is now installed.
19. Install Service Pack 1 for SQL Server 2008:  
<http://www.microsoft.com/downloads/details.aspx?FamilyID=66ab3dbb-bf3e-4f46-9559-ccc6a4f9dc19&displaylang=en>
20. Once you complete the installation of SQL Server 2008, you must download and install the **SQL Server 2005 Backward Compatibility Components** from Microsoft's website at:  
<http://www.microsoft.com/downloads/details.aspx?FamilyId=C6C3E9EF-BA29-4A43-8D69-A2BED18FE73C&displaylang=en>

### **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.

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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 2008 Express:**

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**
  - **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.

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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. Once you complete the installation of SQL Server 2008 Express, you must download and install the **SQL Server 2005 Backward Compatibility Components** from Microsoft's website at: <http://www.microsoft.com/downloads/details.aspx?FamilyID=d09c1d60-a13c-4479-9b91-9e8b9d835cdc&displaylang=en>

### **Installing SQL Server 2005 Express:**

*Note: You will need the core installation of SQL Server 2005 Express as well as the SQL Server 2005 Management Studio Express to successfully complete these steps. Both packages are available as separate downloads from Microsoft.*

1. Launch the SQL Server 2005 Express 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. Click **Next** to continue and provide a name and company information in the **Registration Information** dialog. Click **Next** to continue.
7. The **Feature Selection** interface will load. Click **Next** to continue as no changes need to be made at this time.
8. 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.
9. When the **Error and Usage Report Settings** appears, leave both boxes unchecked and click **Next** to continue.
10. When the **Ready to Install** dialog appears, click **Install**. Click **Next** and then click **Finish** to complete the installation.
11. Launch the SQL Server Management Studio Express installer.
12. When the welcome dialog appears, click **Next**.
13. Accept the **License Agreement** and click **Next** to continue.
14. Provide a name and company information if needed and click **Next** to continue.
15. Click **Next** to continue when the **Feature Selection** dialog appears as no changes need to be made here.
16. Click the **Install** button when the **Ready to Install the Program** dialog appears. Click **Finish** to complete setup.

### **Step 3: Configuring A Transmission Server for EDI**

Electronic Data Interchange (EDI) is the electronic transactions of claims, reports, remittance advice, and other information between payers or clearinghouses and the provider or billing service office. Per system requirements a separate transmission server running Windows XP Professional is required for transmission of claims using point to point dialup (modem transactions). You do not need a transmission server if the client is submitting 100% of their claims to a destination that utilizes a secure connection via the Internet for EDI. Examples of these types of destinations include Gateway EDI, WebMD, and Office Ally.

Workstations running Windows XP Professional can act as a transmission server provided it meets minimum system requirements. Refer to the MDsuite System Requirements section in this guide for further

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information. You will also need to ensure that a working modem is installed on the workstation and a working phone line is attached to the modem. The installation of the MDsuite application server on a workstation computer should not have a negative effect on system performance as it is only used during claims transmission. Even during transmission, a user on the workstation should not notice any performance degradation. Before installing the MDsuite Application Server software on a workstation running Windows XP Professional, Internet Information Services (IIS) must be installed. *Note: Transmission Servers do not need to have Microsoft SQL Server installed.*

### **Installing IIS on Windows XP Professional:**

1. Click on **Start** and select **Control Panel**.
2. Launch **Add or Remove Programs** and click on the **Add/Remove Windows Components** button on the left.
3. The **Windows Components Wizard** dialog appears. Click on **Internet Information Services (IIS)** and then click **Details**.
4. Select only **Common Files, Internet Information Services Snap-In, and World Wide Web Server**. Do not check any other boxes.
5. Click **OK** to close the **Internet Information Services (IIS)** dialog.
6. Click **Next** to proceed with installation. Insert your Windows XP Professional installation media if prompted.
7. When the install is complete, click **Finish**.

You will need to consult with the billing manager or office manager to determine if the client bills any of the following destinations:

- Alabama – Blue Cross/Blue Shield – Cahaba GBA
- Alabama – Medicare Part B – Cahaba GBA
- Georgia – Medicare Part B – Cahaba GBA
- Mississippi – Medicare Part B – Cahaba GBA
- Pennsylvania – Blue Cross – Capital
- Clearinghouse – McKesson
- Clearinghouse - Availity

These destinations implement a Secure FTP (SFTP) over Dial-Up Networking (DUN) connection. Because of this, a special account must be created on the transmission server to automate the claim submission process for these destinations. To implement this you must setup a special user account on the local transmission server and grant that account permission to login as a service.

### **Configuring a User Account for Windows DUN:**

1. If the client bills any of the above mentioned destinations for Alabama, Georgia, Mississippi, or Pennsylvania, proceed with Steps 2 through 9. Otherwise, skip these steps and continue to Installing the MDsuite Application Server for EDI.
2. Go to **Start** and chose **Control Panel**.
3. Open **Administrative Tools** and select **Computer Management**.
4. The **Computer Management** snap-in loads. Expand the **Local Users and Groups** tree.
5. Right click on **Users** and select **New User**.
6. Fill out the username and password fields and uncheck the box for **User must change password at next logon**. Check the box next to **Password Never Expires**. Click **Create**.
7. Close **Computer Management**, then go to **Start**, choose **Run**, and type **secpol.msc**. The **Local Security Settings** snap-in loads.
8. Expand the **Local Policies** tree and click on **User Rights Assignment**. Scroll the list on the right down until you see the **Log on as a service** entry. Right-click on this entry and choose **Properties**.
9. Click the **Add User or Group** button at the bottom of the **Log on as a service Properties** dialog.

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10. The **Select Users or Groups** interface appears. If you are on a domain, you will need to click on **Locations** and change the location to the top-most entry in the list. That entry should be the network name of your workstation.
  11. Enter the username you provided in Step 5 and click **OK**. The **Select Users or Groups** interface closes and the **Log on as a service Properties** list should now show the new user. (e.g. *COMPUTERNAME\username*). Click **OK** to continue.
  12. Close the **Local Security Settings** dialog.

## Ready to Schedule Installation Appointment

You are now ready to contact Data Strategies, Inc. to schedule your MDsuite installation appointment. You will need to fill out the [Server Information Form](#) before an appointment can be scheduled. Please have all necessary information available at the time of your call, including any logins and passwords that will be needed to complete the product installation.

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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.
- 3. Supported edition of SQL Server installed.
- 4. Microsoft Internet Information Services installed on the application server.

### **Prerequisites – Transmission Server**

- 1. Transmission server meets workstation and transmission server requirements.
- 2. Supported operating system installed on transmission server.
- 3. Modem is installed and functional and a dedicated, working phone line is attached.
- 4. Transmission server is setup on the same network as the new application server.

### **Prerequisites - Workstations**

- 1. The .Net Framework 3.5 has been installed on all workstations.
- 2. Internet Explorer 7.0 or greater is 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) was deployed, installed the SQL Server 2005 Backward Compatibility Components.

### **Transmission Server Installation**

- 1. Install Internet Information Services (IIS).
- 2. Create local user account on transmission for special EDI destinations. (Optional)

### **Post Deployment**

- 1. Complete the [Server Information Form](#).
- 2. Reviewed Post Deployment section.

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## Post Deployment

Once the entire deployment process has been completed and the new infrastructure is online, 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:

1. Use Routing and Remote Access for VPN setup.
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 a DLT, Travan, Ultrium LTO tape drive or other form of removable media.
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. DSI cannot provide support for third party backup solutions, regardless of which method is used. 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)

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