

vxVistA Open Source Advanced Setup and Installation Guide

vxVistA version 2013.0

Cache 2013.1.1.501.1 for Windows OS



DECEMBER 11, 2013

DSS, INC.

Table of Contents

Introduction	2
Process Overview	2
Files and Directory Structures	3
Installing Cache 2013.1.1.501.1	4
Configuring the database in the Cache System	14
Database Upgrade Procedures.....	19
Upgrading the Database	19
Recompiling the Database	20
Global Mappings	21
Routine Mappings	23
Database Configuration via the VFDVFOIZ Routine.....	26
Security Configuration	31
Enabling and configuring Telnet Services.....	31
Update the WebServerPort	33
Setting up the unknown User	34
Download and Configuration of PuTTY	37
Starting Taskman and the Listener	39
New Task Setup (Initial Installation Only)	39
Starting Taskman and the Listener	41
Taskman and Listener Start-up Verification	42
New User Configuration.....	44
Creating a New User via Cloning	44
Adding Secondary Menu Options and Security Keys	49
Configuring Shortcuts and Settings	54
Setup of vxPatient Picture	59
Appendix A	66
User Configuration - Menu Options & Keys	66
vxCPRS.....	66
vxBCMA	66
vxGroupNotes	66
vxPatientPicture	66
vxVitals.....	66
Appendix B	67
Alternate Method of Starting Taskman and the Listener	67
Appendix C	71
FAQs	71
Why is it necessary to create and configure a new user; won't the Administrative user allow me to do everything I need?	71
Why do I need to add Menu Options and Security Keys to users?.....	71
How do I know which Secondary Menu Options and Security Keys a particular user carries?	71

Introduction

Process Overview

The purpose of this document is to inform and instruct users on 'How to' configure Cache 2013.1.1.501.1 for Open Source vxVistA version 2013.0 and how to properly set up and configure namespaces. The main sections include: Installing Cache 2013.1.1.501.1, Configuring the database in the Cache System, Security Configuration, New User Configuration, and Configuring Shortcuts and Settings. Upgrading vxVistA is also covered, but not an expected requirement at the time of this documents creation.

Overview:

1. Installing Cache
2. Building the vxVistA Structure
3. Creating a New Namespace
4. Setting the Global Mappings
5. Setting the Routine Mappings
6. Setting up Cache Access
7. Security Configuration
8. New User Configuration
9. Connecting the Applications to the vxVistA Database*

* If attempting to use an existing (older) Cache database with this version of Cache please follow the instructions in the Database Upgrade Procedures section.

The required folders to be created are as follows:

- C:\DBRoot\V13 (your drive letter):\directory\name space)
- C:\HFS
 - The above folders are customarily created within the main C:\ drive of the computer being configured
- C:\vxVistaServer
 - The vxVistA Applications which will be contained within this folder are not required to be on the main drive, but may be placed there
- C:\PatientPictures
 - Folder used for storing pictures taken with the vxPatientPicture App

The Access/Verify Code pair provides the user access while in terminal mode and also when logging into applications. Two Access/Verify Code pairs have been configured for this installation; they are as follows and are case-sensitive:

- Administrative – For use primarily within a Terminal session
 - ACCESS CODE: ADMIN1 VERIFY CODE: 123Admin!!
- Standard – For use specifically for the provided vxApplications
 - ACCESS CODE: NEWUSER1 VERIFY CODE: 123Newuser!!

To obtain a no-cost, 30-day trial license key for InterSystems Cache and to download Cache 2013.1.1.501.1, please contact eval@dssinc.com

Files and Directory Structures

Unzip the 'OS vxVista 2013' folder and 'Extract All' the contents.

Below is the image showing the contents of the directory:

- **Documentation** – Release Notes for all Applications and Updates, as well as, this Installation Document
- **EXE-DLL** – Application Executables and Associated Files
- **KIDS Builds** – Required Updates for Application Functionality
- **Source Code**
- **vxVista OS Cache DAT** – Cache.dat

Name	Date modified	Type	Size
Documentation	12/4/2013 10:37 AM	File folder	
EXE-DLL	11/27/2013 2:54 PM	File folder	
KIDS Builds	11/27/2013 3:39 PM	File folder	
Source Code	11/27/2013 2:53 PM	File folder	
vxVista OS Cache DAT	11/27/2013 3:27 PM	File folder	
OS vxVista 2013	12/4/2013 9:49 AM	Microsoft Excel 97...	16 KB

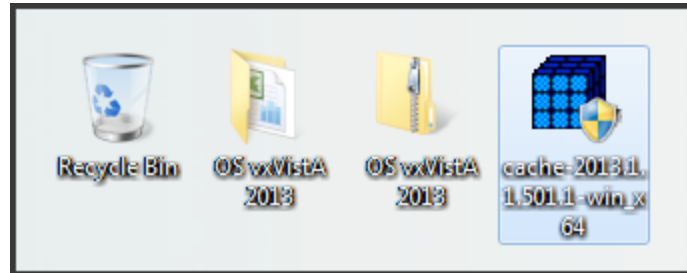
File and Directory Structures Initial Setup:

1. Create the 'DBRoot' folder on the C:\ drive and then create the 'V13' folder within 'DBRoot'.
2. Open the 'vxVista OS Cache DAT' folder located within the 'OS vxVista 2013' folder previously unzipped.
3. Unzip 'vxVista 2013.0-Gold-Open Source-2013-11-27.dat.zip'.
 - a. The uncompressed file name is 'Cache.dat'.
 - i. 'Cache.dat' may be contained within a folder named 'vxVista 2013.0-Gold-Open Source-2013-11-27.dat' (Dependent on Compression Software).
 - b. Move 'Cache.dat' to the 'V13' folder within 'DBRoot'.
4. Create the 'vxVistaServer' folder to the desired drive.
 - a. Right Click on the folder and Click 'Properties'.
 - b. Click the 'Sharing' tab on the window that opens.
 - c. Click the 'Share' button to bring up a 'File Sharing' window.
 - d. Enter 'Everyone' into the space provided and push 'Add'.
 - e. Set the 'Permission Level' to 'Read' as a minimum and recommended setting.
 - f. Press 'Share', and then press 'Done'. Close the 'Properties' window.
5. Create the 'HFS' folder on the C:\ drive.
 - a. Follow the above steps to turn on sharing and set it to 'Everyone'.
6. Create the 'PatientPictures' folder on the C:\ drive.
 - a. Follow the above steps to turn on sharing and set it to 'Everyone', with the following exception.
 - b. Once 'Everyone' has been added, set the 'Permission Level' to 'Read/Write'.

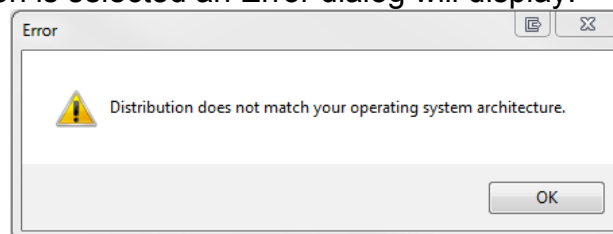
Installing Cache 2013.1.1.501.1

For the purpose of this document, Cache 2013.1.1.501.1 64 bit Windows is being used.

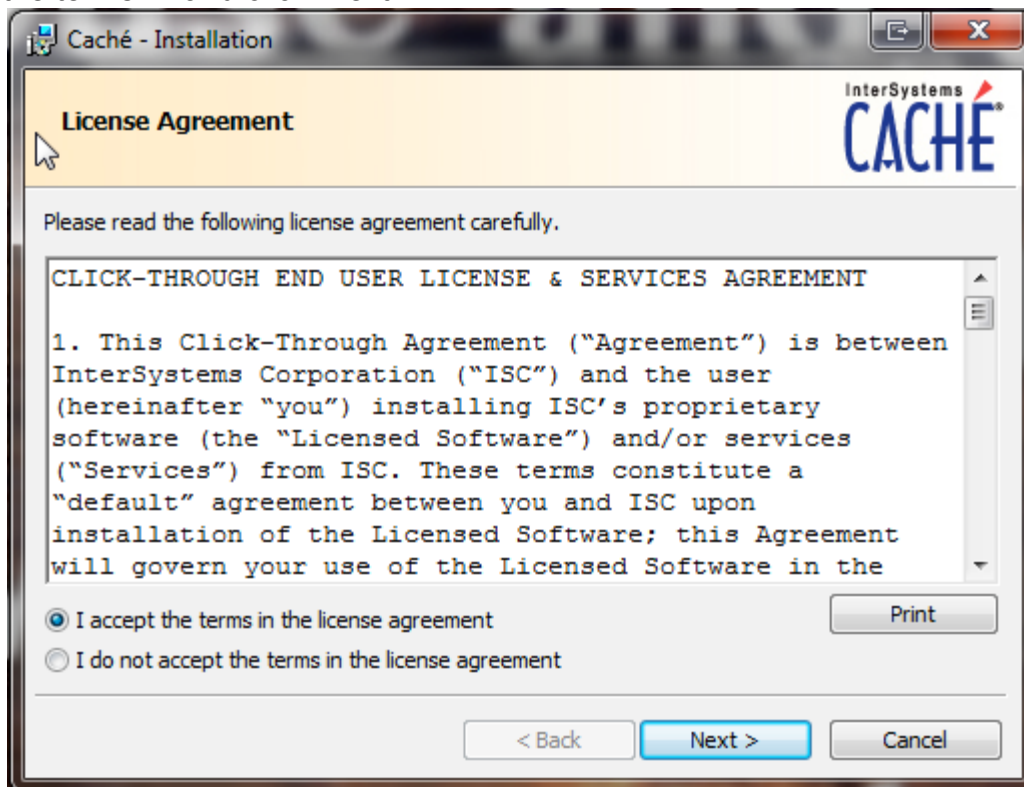
1. To install Cache, locate the executable file that is appropriate for the computer being installed with either the 32 or 64bit version of Cache 2013.1.1.501.1.



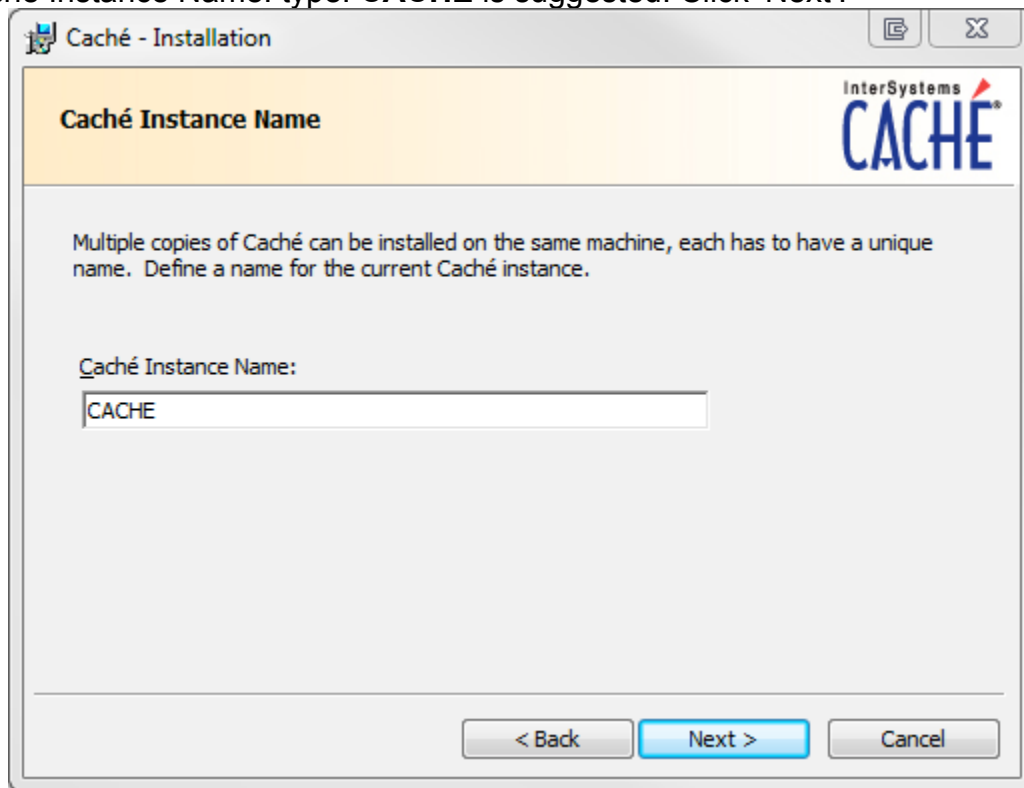
If the incorrect version is selected an Error dialog will display.



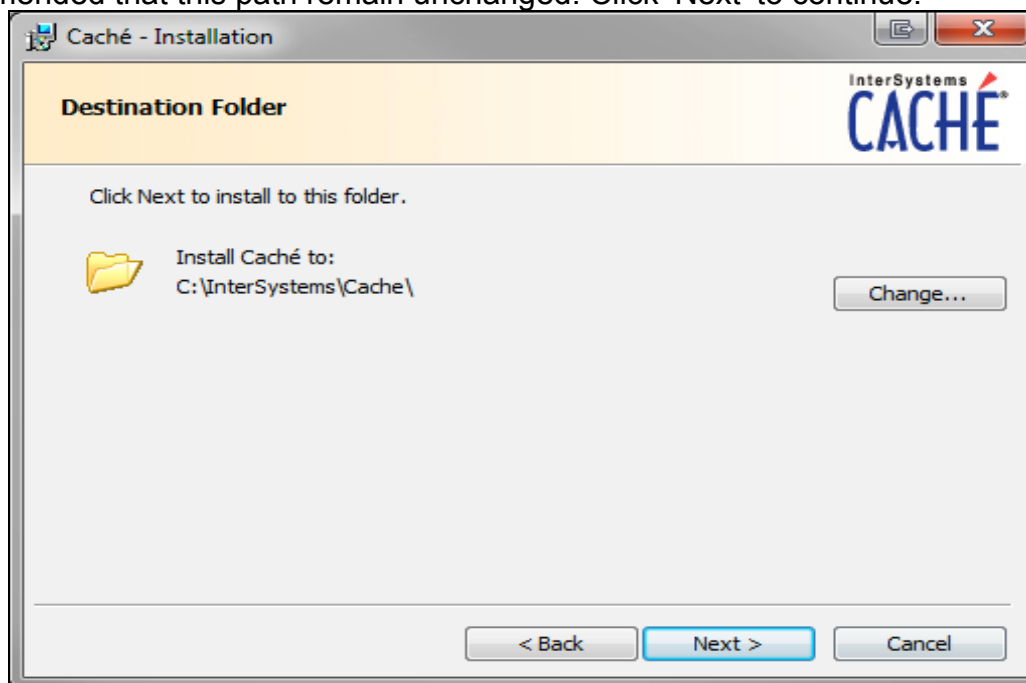
2. Double Click on the *cache-2013.1.1.501.1-win_x64.exe* executable file icon. Select 'I accept the terms...' and click 'Next'.



3. Cache Instance Name: type: **CACHE** is suggested. Click 'Next'.



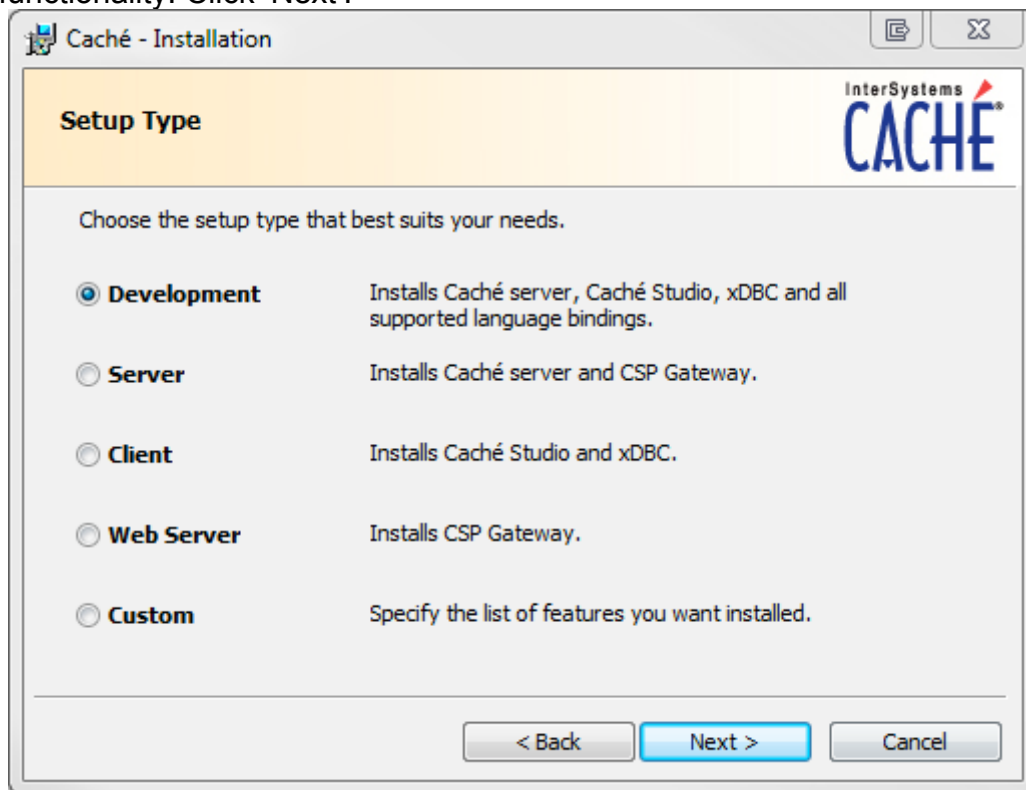
4. Destination Folder: the default location will be populated as C:\InterSystems\Cache\. It's recommended that this path remain unchanged. Click 'Next' to continue.



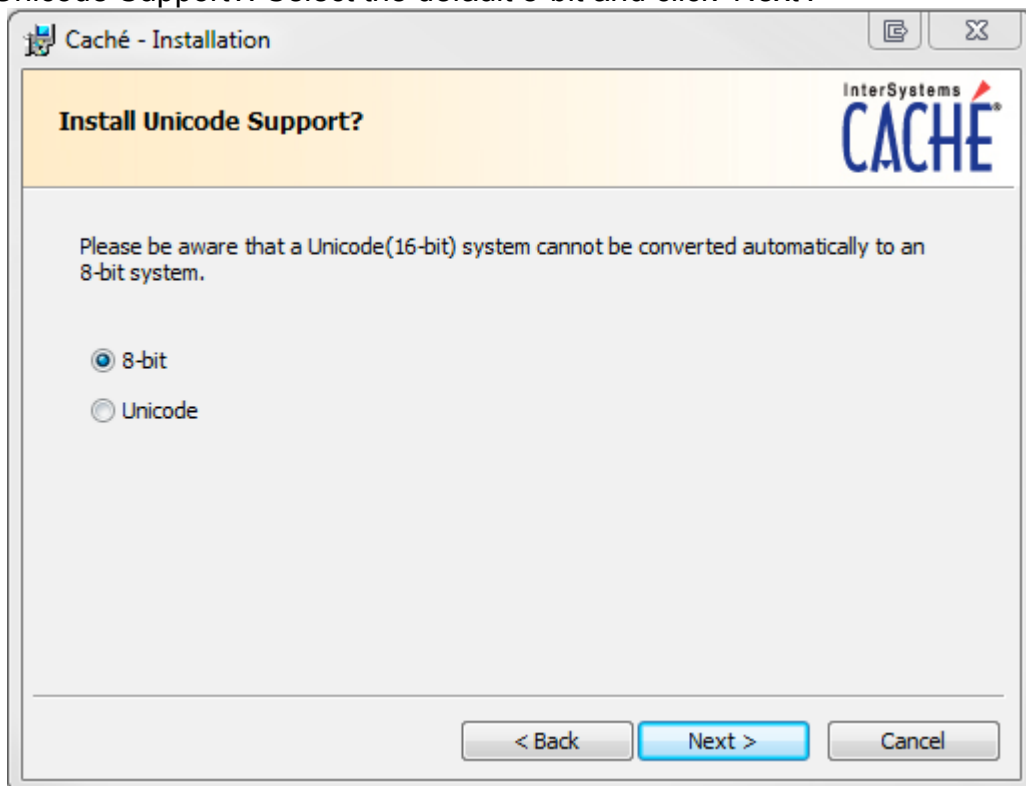
Note:

This is the root folder location where the license key will be placed in a later step
C:\InterSystems\Cache\mgr

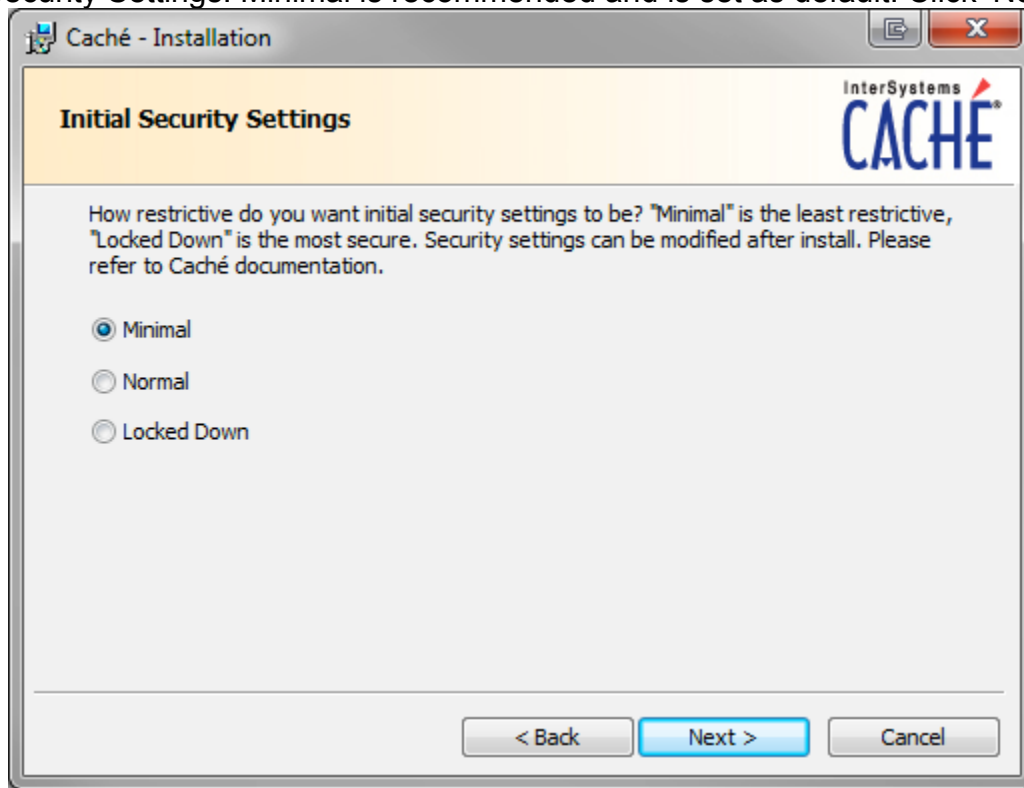
5. Setup Type: Development is the default type and is recommended to enable the Cache Studio functionality. Click 'Next'.



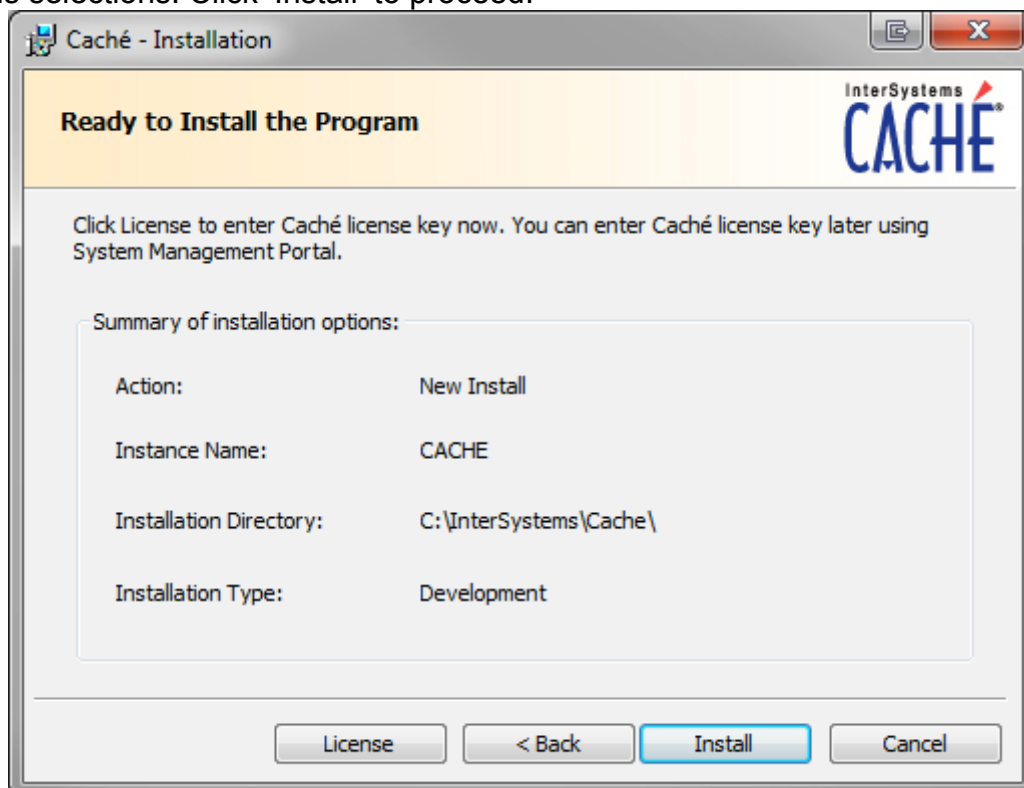
6. Install Unicode Support?: Select the default 8-bit and click 'Next'.



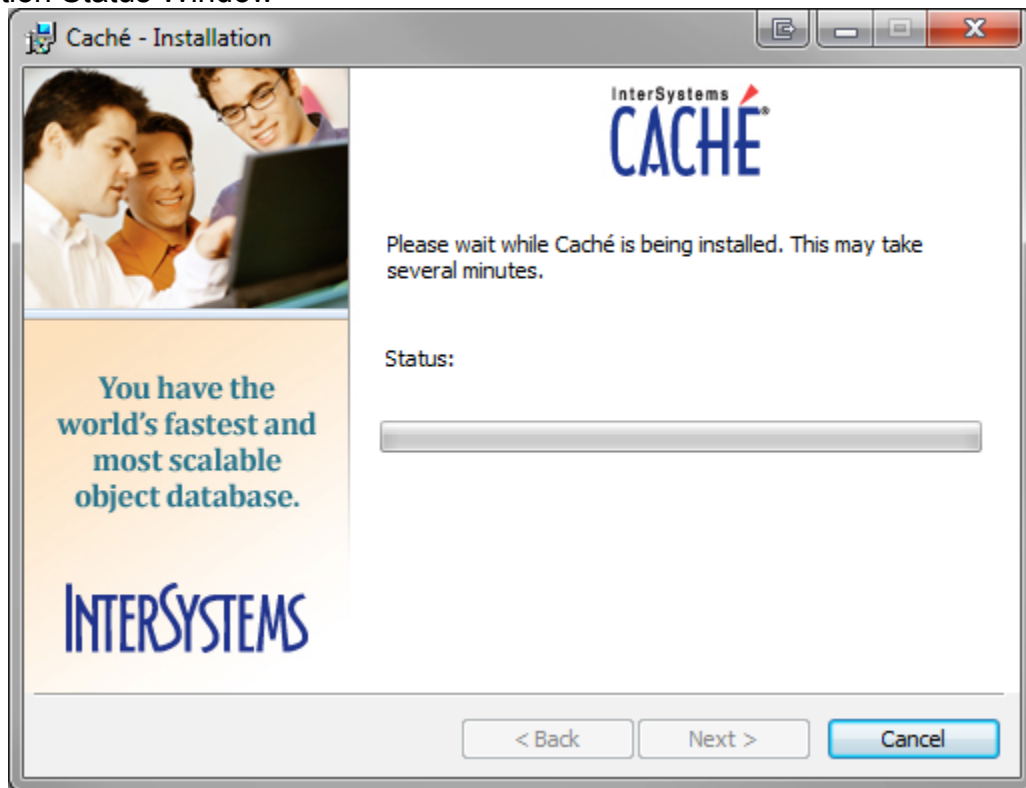
7. Initial Security Settings: Minimal is recommended and is set as default. Click 'Next'.



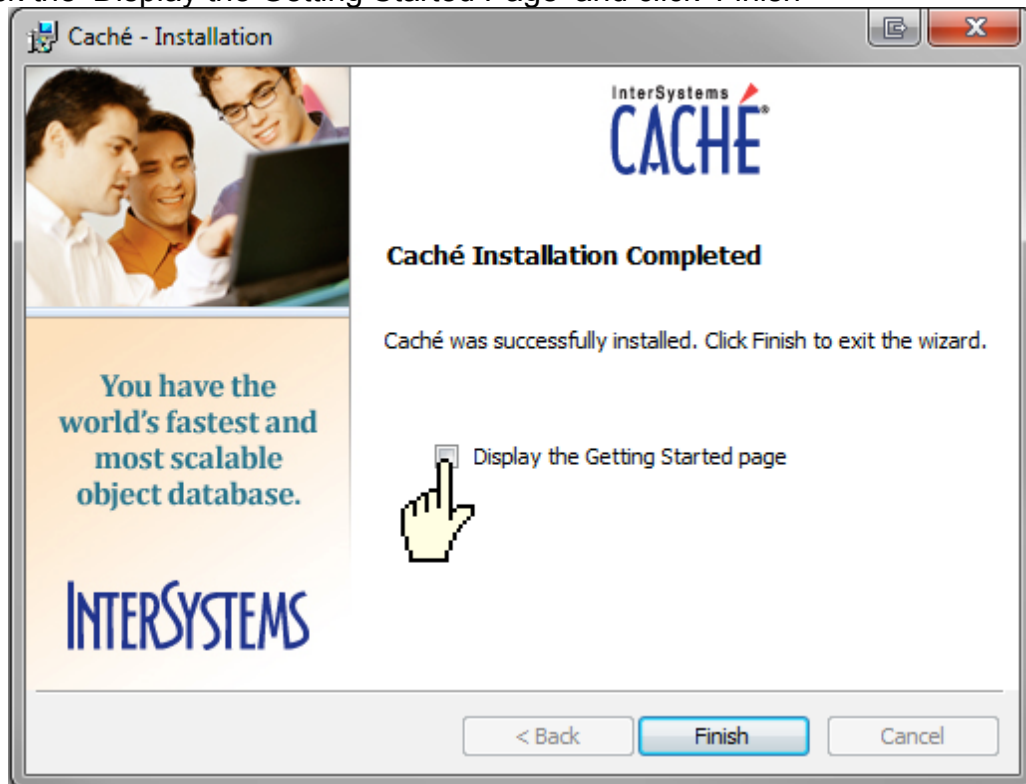
8. Ready to Install the Program: this dialog provides the opportunity to review some of the previous selections. Click 'Install' to proceed.




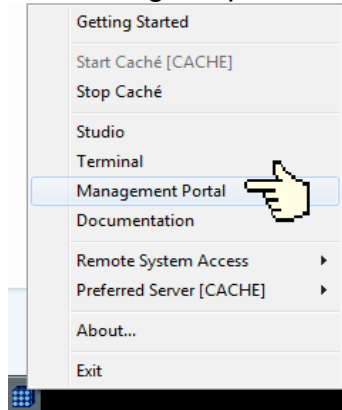
9. Installation Status Window



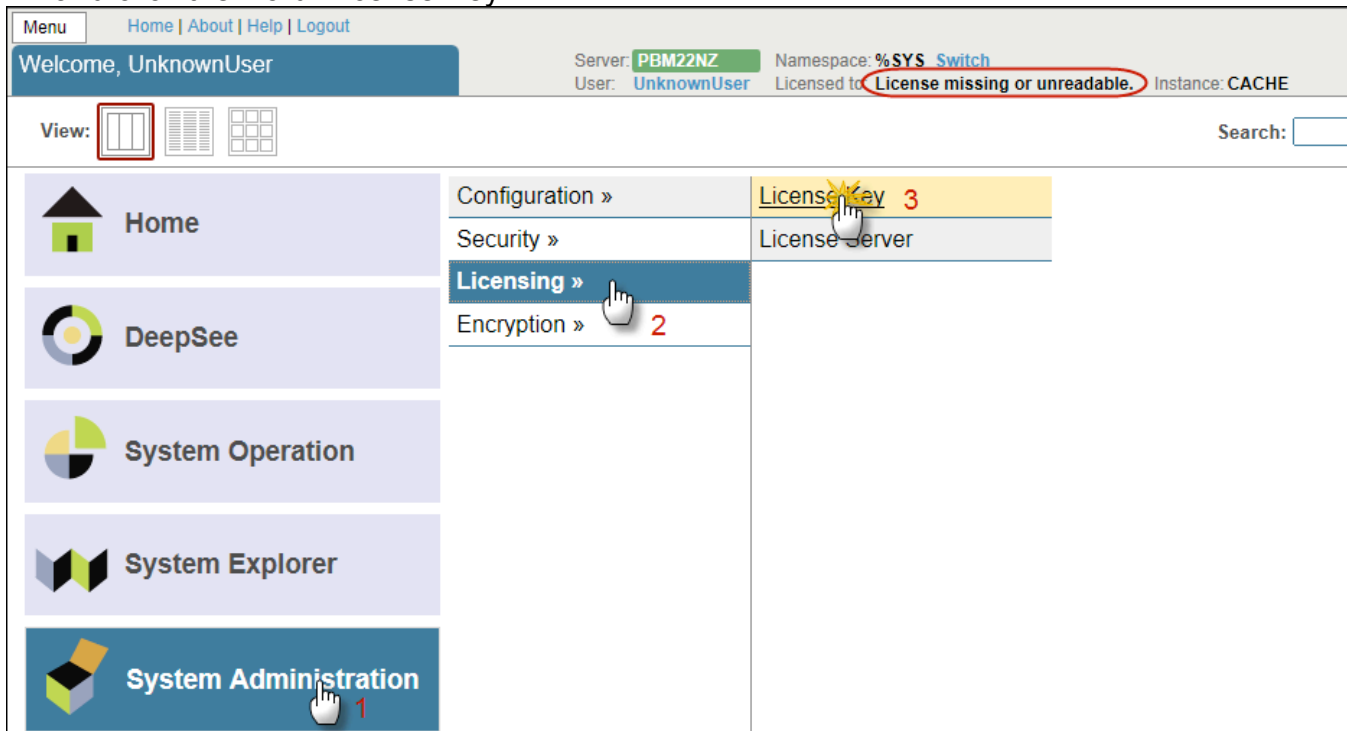
10. Uncheck the 'Display the Getting Started Page' and click 'Finish'



11. Upon completion of the installation process locate the Cache license key that was provided with your copy of Cache 2013 . Copy this file into the following path: C:\Intersystems\Cache\mgr
12. Right click the blue Cache cube in the Notifications Area and select 'Management Portal'. Opening 'Management Portal' for the first time may take 1-2 minutes, and navigation for the steps below may also lag prior to Licensing the product.



13. Taking notice of the 'License missing or unreadable' message, follow the steps as shown and click the word 'License Key'.



[Menu](#)
[Home](#) | [About](#) | [Help](#) | [Logout](#)

Welcome, UnknownUser

Server: PBM22NZ
User: UnknownUser
Namespaces: %SYS_Switch
Licensed to: License missing or unreadable.
Instance: CACHE

View:

Search:

Home

DeepSee

System Operation

System Explorer

System Administration

Configuration »

Security »

Licensing »

Encryption »

License Key

License Server

License Key

View license key information or Activate a new license key.

Go

Add to favorites

System Resource(s)
%Admin_Manage

Custom Resource
-

Assign

Menu Home | About | Help | Logout System > Licensing > License Key

License Key

Server: **R80T4N6** Namespace: %SYS
User: **UnknownUser** Licensed to: **License missing or unreadable.** Instance: **CACHE**

by InterSystems

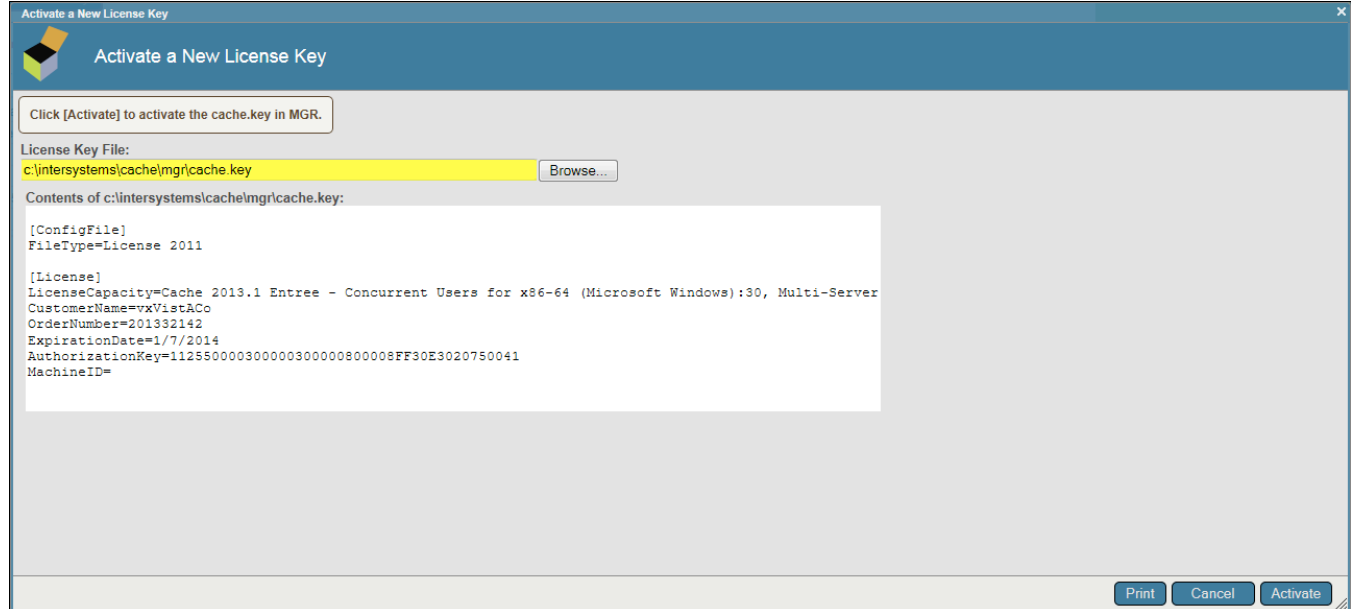
Print **Activate New Key**

The cache.key in MGR will not take effect until it is activated or the system is restarted.

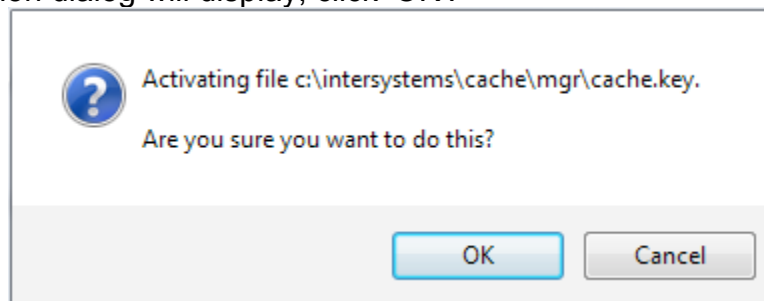
Current license key information for this system:

License Capacity	Default license for configuration diagnosis.
Customer Name	License missing or unreadable.
Order Number	0
Expiration Date	0
Authorization Key	00055000000000000000100000000001EA495D9041
Machine ID	

16. The next screen opens the key and exposes the information for verification purposes prior to activation. If no issues are evident click 'Activate'.



17. A final confirmation dialog will display, click 'OK'.

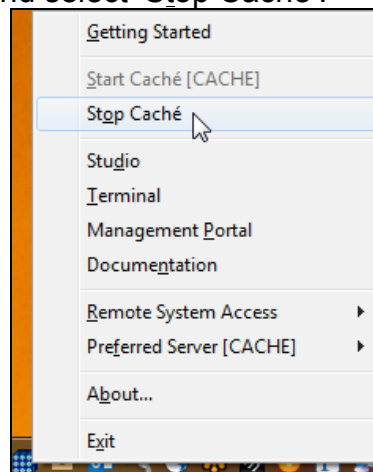


18. The window will now display that the key is active, but the 'Licensed to:' field at the top of the page will not update until the system has been restarted.

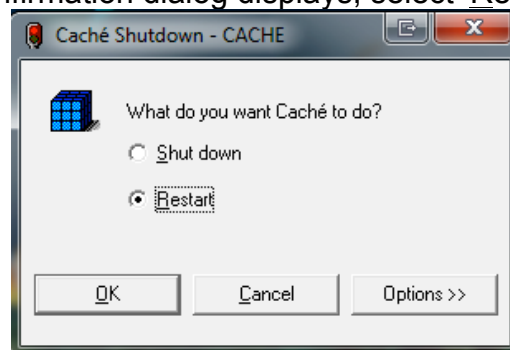
Current license key information for this system:	
License Capacity	Cache 2013.1 Entree - Concurrent Users for x86-64 (Microsoft Windows):30, Multi-Server
Customer Name	vxVistACo
Order Number	201332142
Expiration Date	1/7/2014
Authorization Key	112550000300000300000800008FF30E3020750041
Machine ID	

19. Close the window and begin the restart process below.

20. Right click the blue Cache cube and select 'Stop Cache'.



21. The Cache Shutdown confirmation dialog displays, select 'Restart' and click 'OK'.



The 'Stopping Cache' displays.

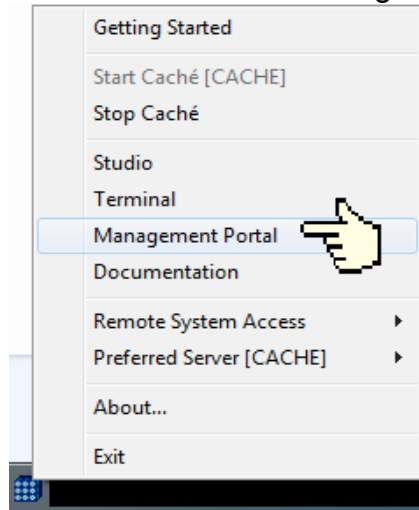


22. Followed by the 'Starting Cache' dialog.



Configuring the database in the Cache System

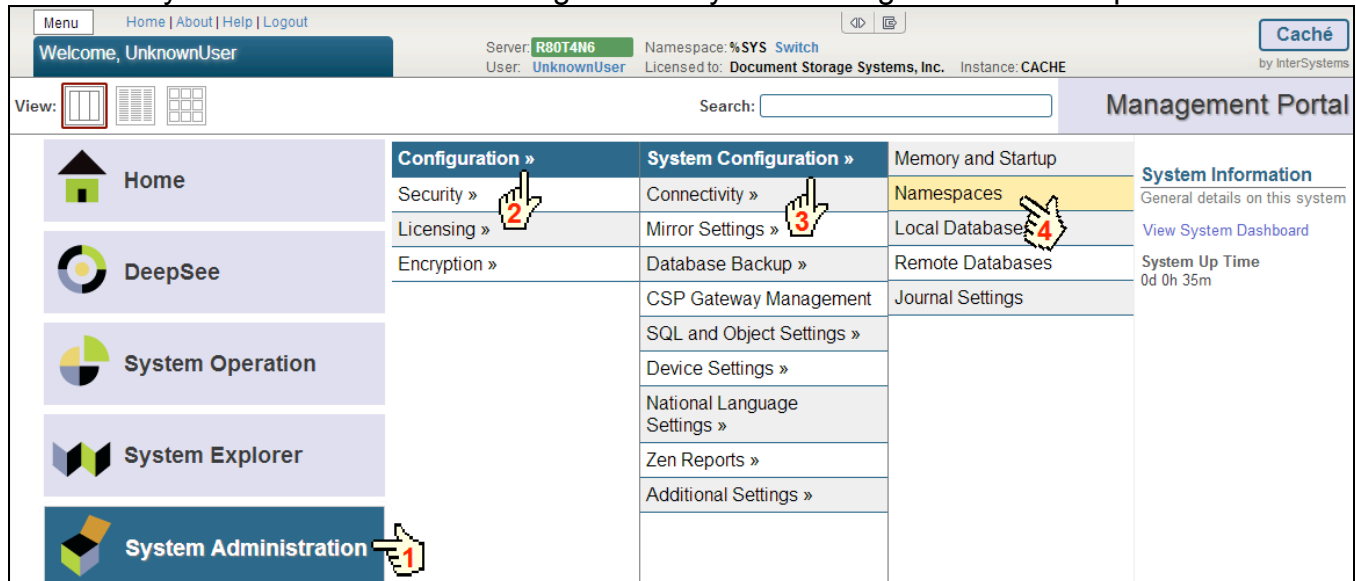
1. Right click on the blue Cache cube  and select 'Management Portal'.



Note:

If the 'Management Portal' still lags after Licensing, perform a Restart of your Computer.

2. Click 'System Administration>Configuration>System Configuration>Namespaces'.



3. Click the 'Create New Namespace' button.

Menu Home | About | Help | Logout System > Configuration > Namespaces

Namespaces Server: R80T4N6 Namespace: %SYS
User: UnknownUser Licensed to: Document Storage Sy

Create New Namespace

Current Namespaces and their default databases for globals and routines: Last update: 2013-08-23 13:43:41.561

Filter: Page size: 20 Items found: 4

Namespace	Globals	Routines	Temp Storage					
%SYS	CACHESYS	CACHESYS	CACHETEMP	-	Global Mappings	Routine Mappings	Package Mappings	-
DOCBOOK	DOCBOOK	DOCBOOK	CACHETEMP	Edit	Global Mappings	Routine Mappings	Package Mappings	Delete
SAMPLES	SAMPLES	SAMPLES	CACHETEMP	Edit	Global Mappings	Routine Mappings	Package Mappings	Delete
USER	USER	USER	CACHETEMP	Edit	Global Mappings	Routine Mappings	Package Mappings	Delete

4. In the 'Name of the namespace:' textbox enter 'V13' and click 'Create New Database'.

Menu Home | About | Help | Logout System > Configuration > Namespaces > New Namespace

New Namespace Server: R80T4N6 Namespace: %SYS
User: UnknownUser Licensed to: Document Storage Sy

Use the form below to create a new namespace:

Name of the namespace: V13

The default database for this namespace is a ☒ Local Database
☐ Remote Database

Select an existing database: USER - C:\InterSystems\Cache\mgr\user\

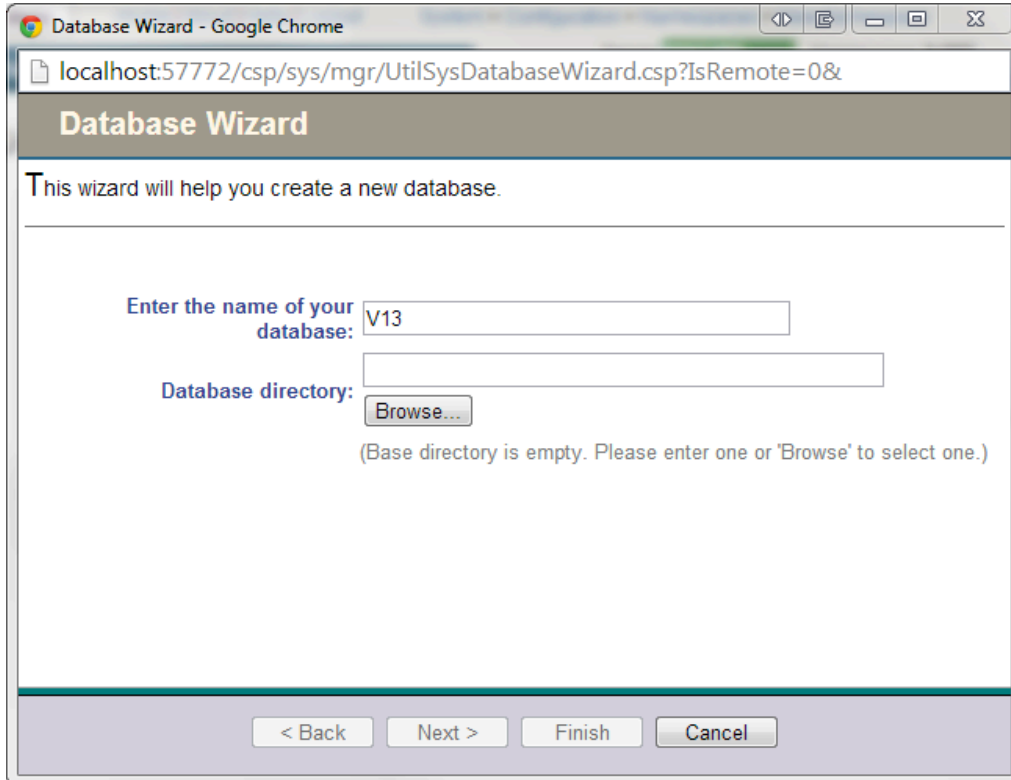
Create New Database

☒ Create a default Web application for this namespace

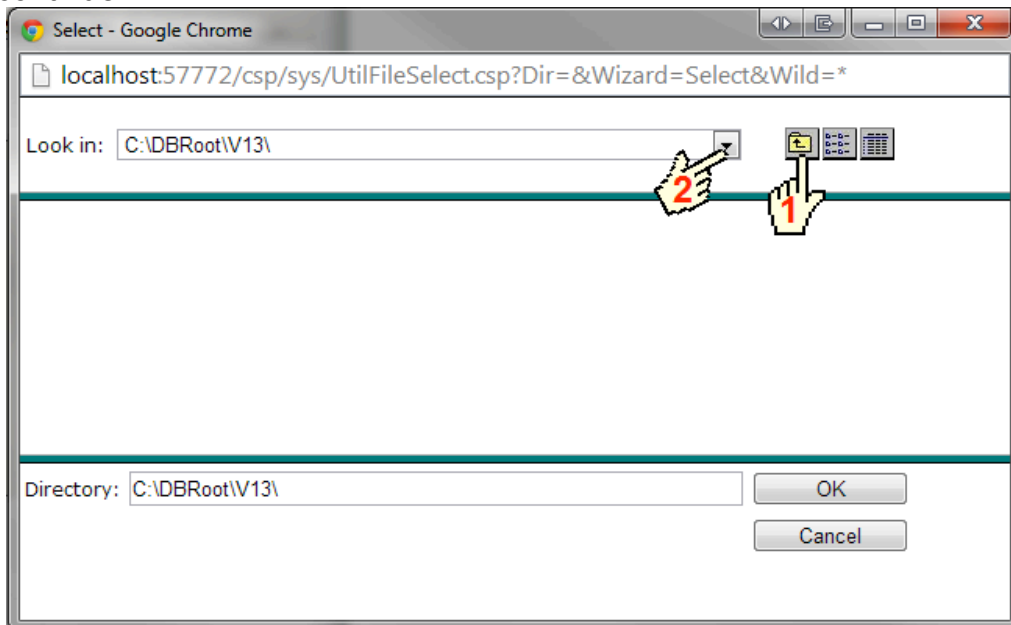
Copy namespace mappings from

Save Cancel

5. The Database Wizard displays asking for the database name and location. Enter the name 'V13' and click the 'Browse...' button.



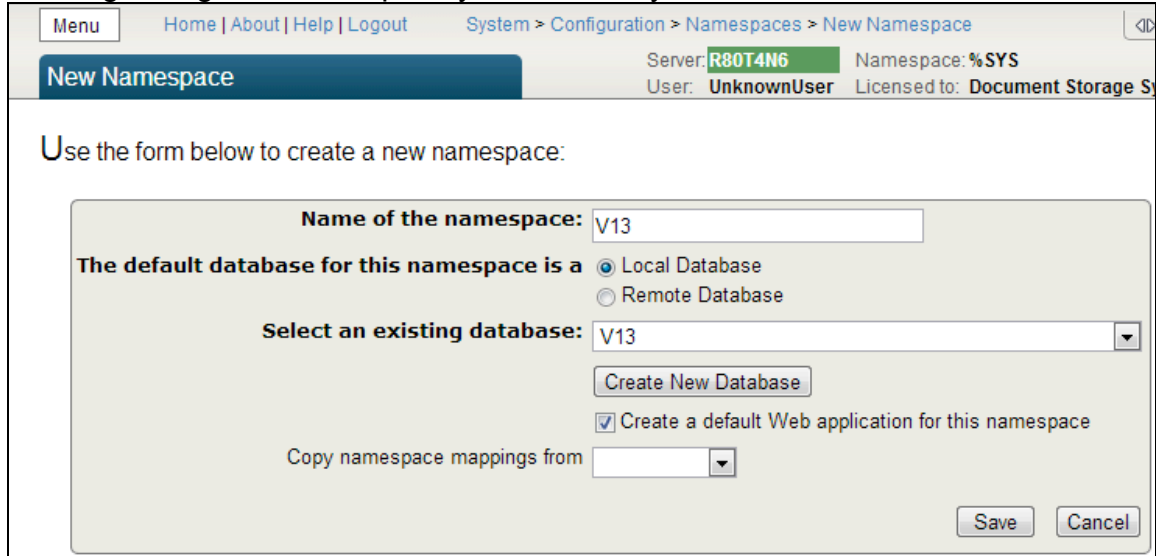
6. Click the folder up icon to navigate to the drive that the DBRoot folder was placed. Then click the 'Look in:' drop down arrow and navigate to the 'V13' folder created earlier. Click 'OK' to continue.



7. The Database Wizard will now be updated to the location of the existing folder and database. Click 'Next'.

8. The Wizard will warn that there is an existing CACHE.DAT file in the location it's pointing to. This message is expected. If this message is not received the location is either incorrect or the database was failed to be copied into the correct directory. Click 'Finish'.

9. Focus will be returned to the namespace configuration page. 'Save' must be clicked to save the existing configuration completely and correctly.



Menu Home | About | Help | Logout System > Configuration > Namespaces > New Namespace

New Namespace Server: R80T4N6 Namespace: %SYS
User: UnknownUser Licensed to: Document Storage S

Use the form below to create a new namespace:

Name of the namespace: V13

The default database for this namespace is a ☒ Local Database ☐ Remote Database

Select an existing database: V13

Create New Database

☒ Create a default Web application for this namespace

Copy namespace mappings from

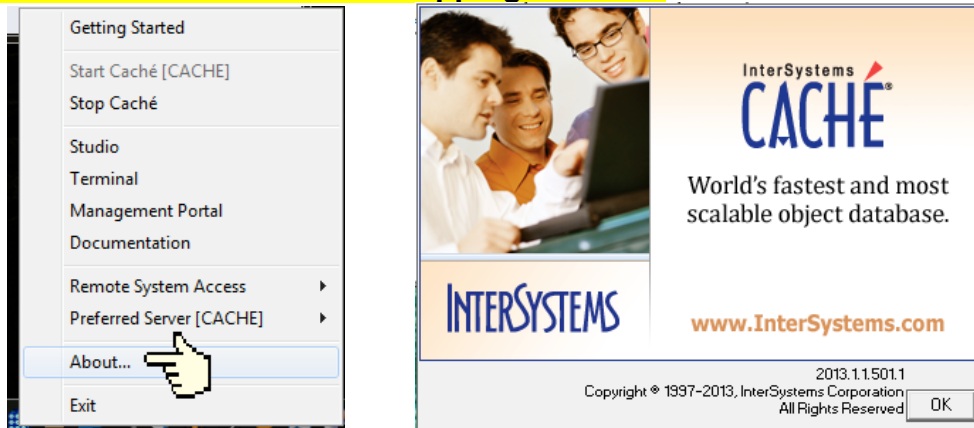
Save Cancel

10. The vxVista database has now been mounted into the Cache system.

Database Upgrade Procedures

Before adding the Global Mappings and Routine Mappings it's important to verify that the correct Cache version is in use. Verify Cache version by right clicking the blue Cache cube and selecting 'About...' to display the current Cache version information.

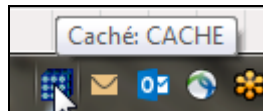
If you are using Cache 2013.1.1.501.1 and a Vista 2013 database, no upgrade is needed! Skip this section and continue to the 'Global Mappings' section.



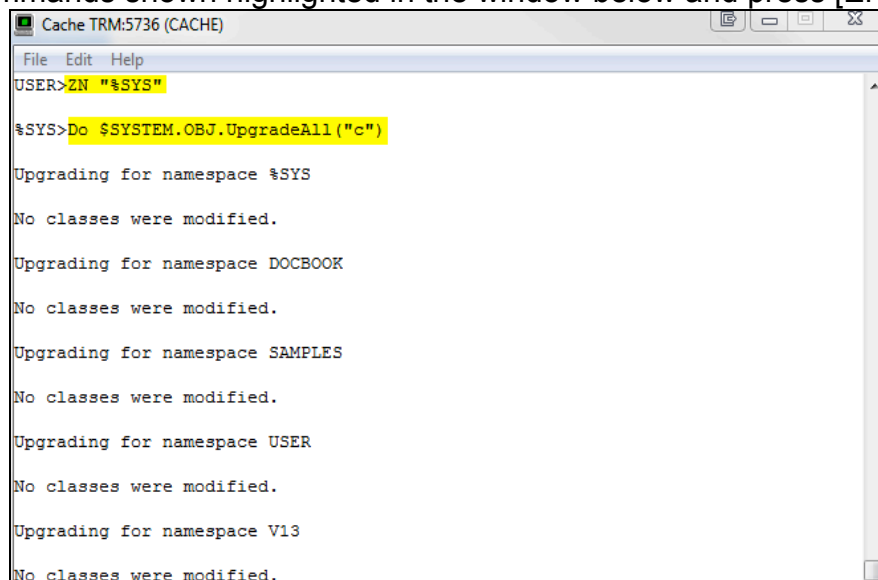
If you are currently using a version greater than Cache 2013.1.1.501.1, please follow the 'Upgrading Procedures' to upgrade to the current cache.dat version. Once the upgrade is complete, continue on to the 'Global Mappings' section.

Upgrading the Database

1. To upgrade the cache.dat file to versions greater than 2013.0, right click the blue Cache cube and select 'Terminal'.



2. Type the commands shown highlighted in the window below and press [ENTER]:



Recompiling the Database

After performing the upgrade, enter the following lines into the terminal

1. %SYS>ZN "V13" ***to switch namespace**
2. Press [ENTER] to continue.
3. V13>D ^%RCOMPIL ***the command to recompile the upgraded database**
4. Press [ENTER] to continue. This option recompiles all VistA routines and must be performed after upgrading.
5. At the Routine(s): prompt type: * and press [ENTER] to continue.
6. At the next Routine(s): prompt press [ENTER].
7. **Take care at step 6 to only press [ENTER] once.** This process can pause for up to 3-5 minutes. **DO NOT HIT [ENTER] AGAIN!**
8. At the Display syntax errors? Yes => prompt type: **NO**
9. Press [ENTER] to continue.
10. Press [ENTER] at the next two prompts and the auto recompile will begin.


```
Routine(s): *
Routine(s): Press enter here
(3-5 minutes pause here)
Display syntax errors? Yes => NO
Display on
Device:
Right margin: 80 => █
```

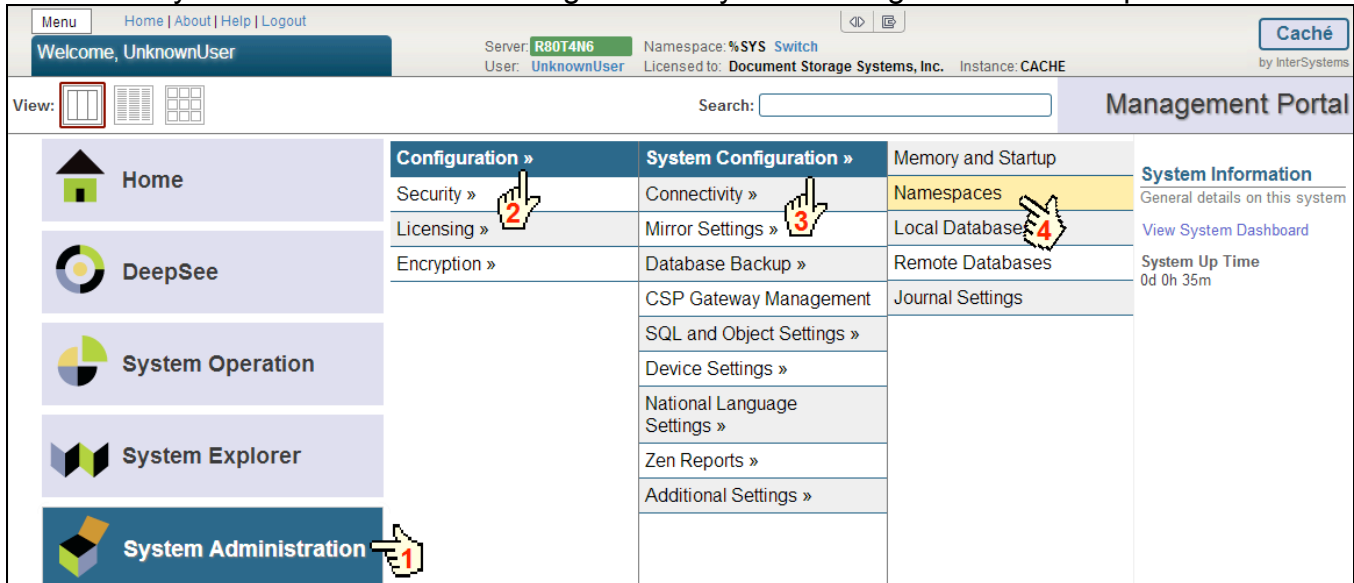
11. All routines being recompiled will display. Once this action is complete, you will be returned to the V13> namespace prompt. Close the terminal.

```
Cache TRM:2792 {CACHE}
File Edit Help
LRUPA1.INT  LRUPA1.INT  LRUPA2.INT  LRUPAC.INT  LRUPACA.INT  LRUPACS.INT
LRUPACT.INT LRUPAD.INT  LRUPAD1.INT LRUPAD2.INT LRUPQ.INT    LRUPQ1.INT
LRUPS.INT   LRUP.T.INT  LRUPUM.INT  LRUQ.INT    LRUR.INT     LRURG.INT
LRUSE.INT   LRUSET.INT  LRUSNOM.INT LRUSP.INT   LRUT.INT     LRUTA.INT
LRUTAD.INT  LRUTELL.INT LRUTL.INT   LRUTRAN.INT LRUTT.INT    LRUTW.INT
LRUU.INT    LRUV.INT    LRUV.INT    LRUVG.INT   LRUVK.INT    LRUWL.INT
LRUWLF.INT  LRVER.INT   LRVER1.INT  LRVER2.INT  LRVER3.INT   LRVER3A.INT
LRVER4.INT  LRVER5.INT  LRVERA.INT  LRVR.INT    LRVR1.INT    LRVR2.INT
LRVR3.INT   LRVR4.INT   LRVR5.INT   LRVRA.INT   LRVRKIL.INT  LRVRPOC.INT
LRVRPOCU.INT LRVRW.INT   LRWD.INT    LRWLHEAD.INT LRWLST.INT   LRWLST1.INT
LRWLST11.INT LRWLST12.INT LRWLST13.INT LRWLST2.INT LRWOMEN.INT  LRWRKIN1.INT
LRWRKINC.INT LRWRKLS1.INT LRWRKLST.INT LRWRKS.INT   LRWRKS2.INT  LRWU.INT
LRWU1.INT    LRWU2.INT   LRWU3.INT   LRWU4.INT    LRWU5.INT    LRWU6.INT
LRWU7.INT    LRX.INT     LRXDRPT.INT LRXOSO.INT   LRXREF.INT   LRXREF1.INT
MAG7RS.INT   MAG7RSD.INT MAG7RSO.INT MAG7RSR.INT  MAG7UDR.INT  MAG7UFO.INT
MAG7UM.INT   MAG7UP.INT  MAGBAP.I.INT MAGBAPIP.INT MAGBRTE3.INT MAGBRTE4.INT
MAGBRTE5.INT MAGBRTL.D.INT MAGBRTUT.INT MAGCRPT.INT  MAGDAUDR.INT MAGDCCS.INT
MAGDCCS2.INT MAGDCCS3.INT MAGDCCSD.INT MAGDCCSS.INT MAGDFB.INT   MAGDFCNV.INT
MAGDGL.INT   MAGDGMRC.INT MAGDHL7.INT  MAGDHL7T.INT MAGDHLE.INT  MAGDHRS1.INT
MAGDHW0.INT  MAGDHW1.INT  MAGDHW2.INT  MAGDHW3.INT  MAGDIR8.INT  MAGDIR81.INT
MAGDIR82.INT MAGDIR83.INT  MAGDIR84.INT  MAGDIR85.INT  MAGDIR8A.INT  MAGDIR9A.INT
MAGDIR9B.INT MAGDIR9E.INT  MAGDIRVE.INT  MAGDLB1.INT  MAGDLB12.INT  MAGDLB5.INT
MAGDLB6.INT  MAGDLB7.INT  MAGDLB9.INT  MAGDLBAA.INT MAGDLBSR.INT  MAGDMEDI.INT
MAGDMEDJ.INT MAGDMEDK.INT
```

Global Mappings

In order for the Namespace (database) to function correctly, Globals and Routines must be mapped.

1. If closed from an earlier step, right click the blue Cache cube  and select 'Management Portal'.
2. Click 'System Administration>Configuration>System Configuration>Namespaces'.



Management Portal

System Administration (1) > Configuration (2) > System Configuration (3) > Namespaces (4)

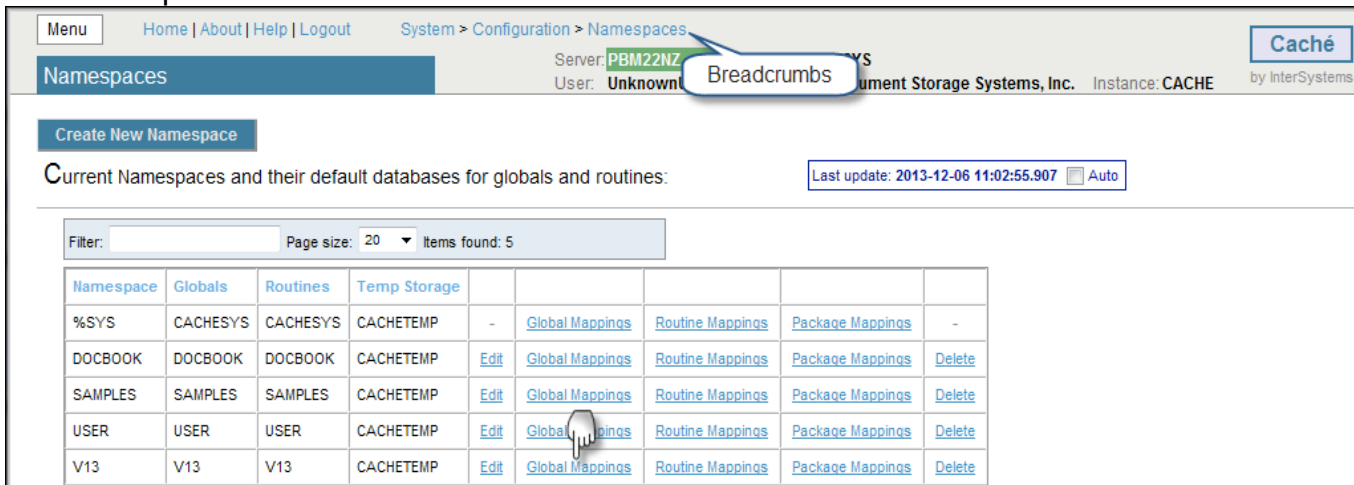
System Information

General details on this system

View System Dashboard

System Up Time
0d 0h 35m

3. Pay attention to the breadcrumbs on pages when navigating through the Cache system to help with location identification. Click the 'Global Mappings' link associated with the 'V13' namespace that was created.



Namespaces

Create New Namespace

Current Namespaces and their default databases for globals and routines:

Last update: 2013-12-06 11:02:55.907 Auto

Namespace	Globals	Routines	Temp Storage					
%SYS	CACHESYS	CACHESYS	CACHETEMP	-	Global Mappings	Routine Mappings	Package Mappings	-
DOCBOOK	DOCBOOK	DOCBOOK	CACHETEMP	Edit	Global Mappings	Routine Mappings	Package Mappings	Delete
SAMPLES	SAMPLES	SAMPLES	CACHETEMP	Edit	Global Mappings	Routine Mappings	Package Mappings	Delete
USER	USER	USER	CACHETEMP	Edit	Global Mappings	Routine Mappings	Package Mappings	Delete
V13	V13	V13	CACHETEMP	Edit	Global Mappings	Routine Mappings	Package Mappings	Delete

4. Click the 'New Global Mapping' button.

5. The Global Mapping dialog box displays to allow entering of necessary elements. Click the dropdown arrow for the 'Global database location:' to set that value as needed. Enter the 'Global name:' as seen in the table below so that it corresponds to that database. Click 'Apply' or press the [ENTER] key after each entry to enter the value.

Global database location:	Global name:
V13	%Z*
CACHETEMP	TMP
CACHETEMP	UTILITY

6. Upon successful completion of entering all the Globals above, click 'Close'.

7. The 'Global Mappings' page will display all mappings entered. If any mistakes were made during the entry of the table values, it is possible to make corrections to or remove the incorrect values by choosing either the 'Edit' or 'Delete' links respectively.

Menu Home | About | Help | Logout System > Configuration > Namespaces > Global Mappings

Global Mappings Server: R80T4N6 Namespace: %SYS User: UnknownUser Licensed to: Document Storage Systems by InterSystems

Cache

New Global Mapping Save Changes Cancel Changes

The global mappings for namespace V13 are displayed below:

Global	Subscript	Database	Edit	Delete
%Z*		V13	Edit	Delete
TMP		CACHETEMP	Edit	Delete
UTILITY		CACHETEMP	Edit	Delete

8. Click the 'Save Changes' button to complete the operation. Click the 'Namespaces' breadcrumb link to return to the 'Namespaces' page.

Routine Mappings

9. Click the 'Routine Mappings' link associated with the 'V13' namespace.

Menu Home | About | Help | Logout System > Configuration > Namespaces

Namespaces Server: R80T4N6 Namespace: %SYS User: UnknownUser Licensed to: Document Storage Systems, Inc.

Create New Namespace

Current Namespaces and their default databases for globals and routines:

Filter: Page size: 20 Items found: 5

Namespace	Globals	Routines	Temp Storage					
%SYS	CACHESYS	CACHESYS	CACHETEMP	-	Global Mappings	Routine Mappings	Package Mappings	-
DOCBOOK	DOCBOOK	DOCBOOK	CACHETEMP	Edit	Global Mappings	Routine Mappings	Package Mappings	Delete
SAMPLES	SAMPLES	SAMPLES	CACHETEMP	Edit	Global Mappings	Routine Mappings	Package Mappings	Delete
USER	USER	USER	CACHETEMP	Edit	Global Mappings	Routine Mappings	Package Mappings	Delete
V13	V13	V13	CACHETEMP	Edit	Global Mappings	Routine Mappings	Package Mappings	Delete

Maintain routine mappings for namespaces.

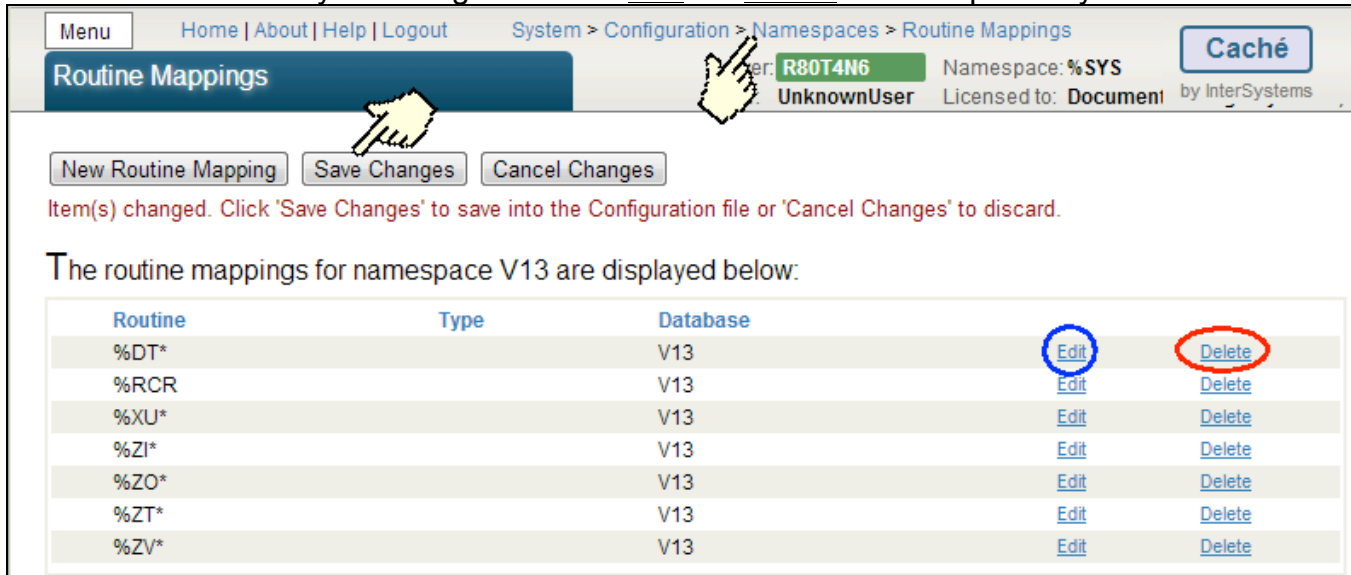
10. Click on the 'New Routine Mapping' button which will open the 'Routine Mapping' dialog page.

11. Click the dropdown arrow for the 'Routine database location:' to set that value as needed. Enter the 'Routine name:' as seen in the table below so that it corresponds to that database. Click 'Apply' or the [ENTER] key after each entry to enter the value.

Routine Database location	Routine Name
V13	%DT*
V13	%RCR
V13	%XU*
V13	%ZI*
V13	%ZO*
V13	%ZT*
V13	%ZV*

12. Upon successful completion of entering all the Routines above, click 'Close'.

13. The 'Routine Mappings' page will display all mappings entered. If any mistakes were made during the entry of the table values, it is possible to make corrections to or remove the incorrect values by choosing either the 'Edit' or 'Delete' links respectively.



Menu Home | About | Help | Logout System > Configuration > Namespaces > Routine Mappings

Routine Mappings Server: R80T4N6 Namespace: %SYS Caché
UnknownUser Licensed to: Document by InterSystems

[New Routine Mapping](#) [Save Changes](#) [Cancel Changes](#)

Item(s) changed. Click 'Save Changes' to save into the Configuration file or 'Cancel Changes' to discard.

The routine mappings for namespace V13 are displayed below:


Routine	Type	Database	Edit	Delete
%DT*		V13	Edit	Delete
%RCR		V13	Edit	Delete
%XU*		V13	Edit	Delete
%ZI*		V13	Edit	Delete
%ZO*		V13	Edit	Delete
%ZT*		V13	Edit	Delete
%ZV*		V13	Edit	Delete

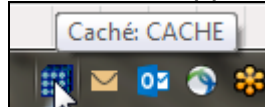
14. Click the 'Save Changes' button to complete the operation and close the 'Management Portal'.


Database Configuration via the VFDVFOIZ Routine

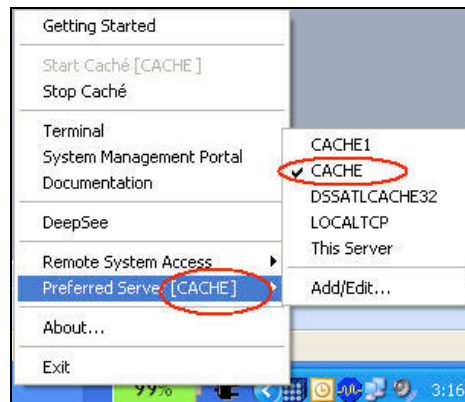
The VFDVFOIZ Routine is necessary to run:


- Every time a database is moved within the same computer into a new instance of Cache that is not the same name as the instance the database came from
- If the Cache database is relocated to a different computer

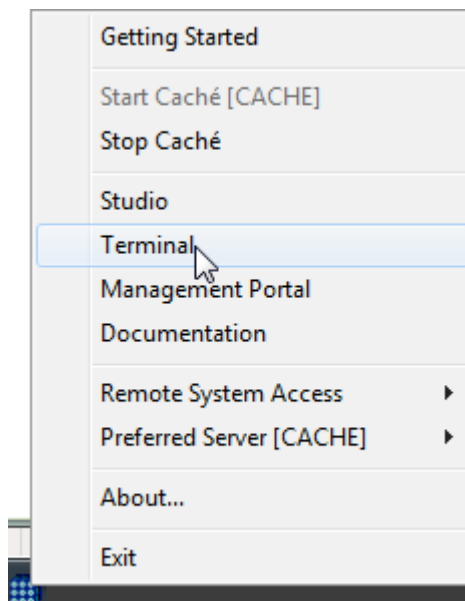
To determine the name of an existing Cache instance mouse over the blue Cache icon  in the system tray and the cache instance name will appear.



If the computer in use has more than a single installation of Cache or is linked to other remote installations (connecting to remote Cache installations is not within the scope of this document), right click the blue Cache icon  and select 'This Server' and mouse over the blue cube again as shown above.



1. Right click the blue Cache cube  and select 'Terminal' and follow the exact terminal notes below.



2. Type the commands as shown in yellow highlight below to navigate into the new V13 namespace that was created.

```

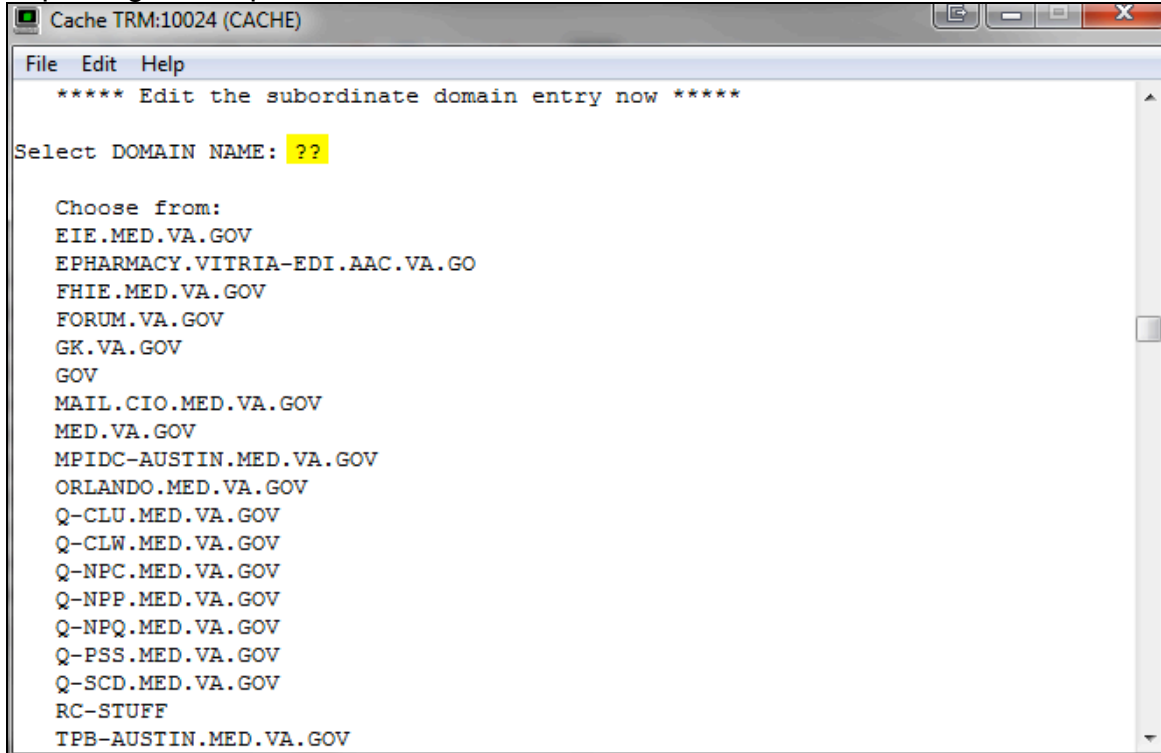
Cache TRM:6772 (CACHE)
File Edit Help
Node: PBM22NZ, Instance: CACHE
USER>ZN "V13"
V13>D ^VFDVFOIZ
  
```

3. Continue to follow and input the yellow highlighted text through the next several screen shots.

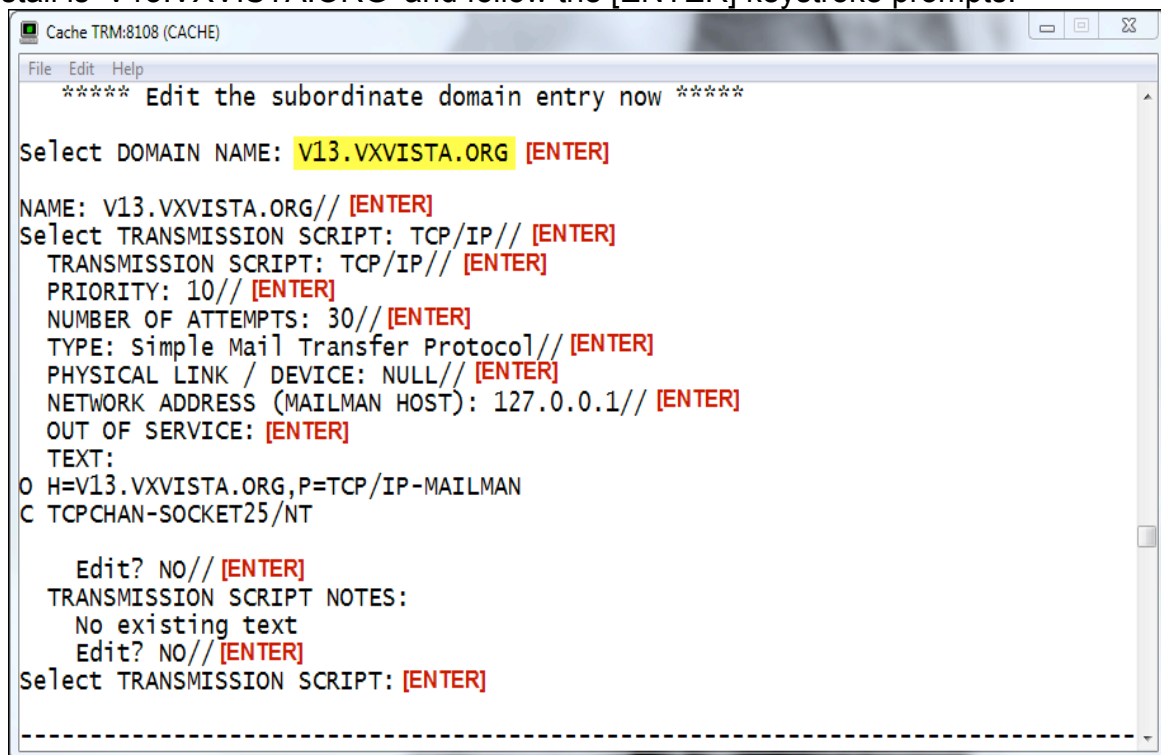
```

Cache TRM:10024 (CACHE)
File Edit Help
-----
Current Box-Pair Name: V13:CACHE
-----
OLD VALUES                                NEW VALUES
-----
Namespace                                V13
Box-Pair                                  V13:CACHE
-----
Do you wish to continue? NO// YES
^%ZOSF() . . .
VOLUME SET file . . .
TASKMAN SITE PARAM file . . .
-----
*** Edit DOMAIN file entries ***
1. Edit the Domain first (e.g. vos.vxvista.org)
   > Edit the name of the entry from which this was cloned
   > Then edit the TRANSMISSION SCRIPT
2. Edit the Parent Domain
   > Edit the parent domain of the Domain in (1)
   > If necessary, edit the TRANSMISSION SCRIPT
***** Edit the subordinate domain entry now *****
  
```

4. If unsure, typing in '??' will generate a list of possible entries at all points where the system is expecting user input.



5. At the next prompt, enter the subordinate Domain Entry, which for the purpose of this install is 'V13.VXVISTA.ORG' and follow the [ENTER] keystroke prompts.



6. The next section requires the parent Domain information.

Cache TRM:8108 (CACHE)

File Edit Help

***** Edit the parent domain entry now *****

Select DOMAIN NAME: VXVISTA.ORG [ENTER]

NAME: VXVISTA.ORG// [ENTER]

Select TRANSMISSION SCRIPT: TCP/IP// [ENTER]

TRANSMISSION SCRIPT: TCP/IP// [ENTER]

PRIORITY: 10// [ENTER]

NUMBER OF ATTEMPTS: 30// [ENTER]

TYPE: Simple Mail Transfer Protocol// [ENTER]

PHYSICAL LINK / DEVICE: NULL// [ENTER]

NETWORK ADDRESS (MAILMAN HOST): 127.0.0.1// [ENTER]

OUT OF SERVICE: [ENTER]

TEXT:

O H=V13.VXVISTA.ORG,P=TCP/IP-MAILMAN

C TCPCHAN-SOCKET25/NT

Edit? NO// [ENTER]

TRANSMISSION SCRIPT NOTES:

No existing text

Edit? NO// [ENTER]

Select TRANSMISSION SCRIPT: [ENTER]

7. Next information required is the Institution Name.

Cache TRM:10024 (CACHE)

File Edit Help

Get that assigned number before proceeding any further

Do you wish to continue? NO// YES

Select INSTITUTION NAME: ??

Choose from:

AUSTIN MHV	TX	OTHER	200MH
DOCUMENT STORAGE SYSTEMS		MC (M)	050
TELEHEALTH AMD	TX	OTHER	200T2
TELEHEALTH AMERICAN TELECARE		TX OTHER	200T6
TELEHEALTH HEALTH HERO	TX	OTHER	200T1
TELEHEALTH VITEL NET	TX	OTHER	200T4
TELEHEALTH VITERION	TX	OTHER	200T5
VXVISTA.ORG		MC (M)	100

You may enter a new INSTITUTION, if you wish

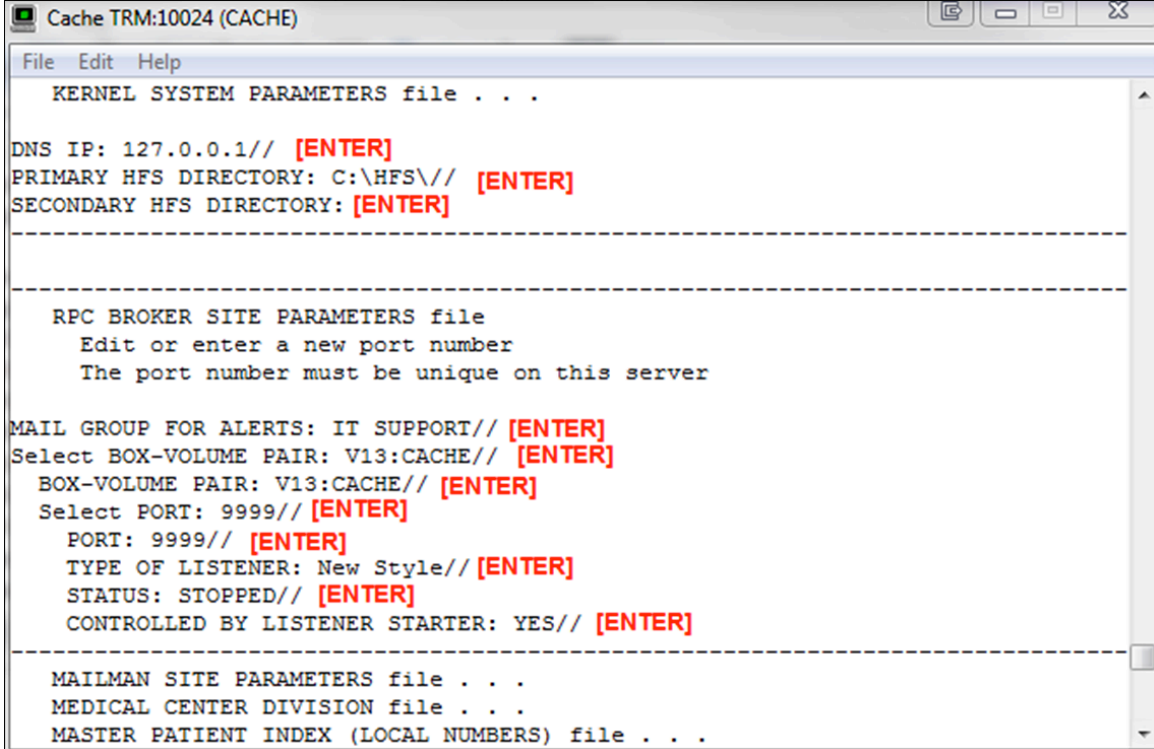
This is the name of the institution with out modifiers like state or type.

Select INSTITUTION NAME: VXVISTA.ORG MC (M) 100

KERNEL SYSTEM PARAMETERS file . . .

DNS IP: 127.0.0.1// [ENTER]

8. After [ENTER]ing through the remainder of the installation, the command prompt will return to the 'V13>' namespace prompt.



```
Cache TRM:10024 (CACHE)
File Edit Help
  KERNEL SYSTEM PARAMETERS file . . .

DNS IP: 127.0.0.1// [ENTER]
PRIMARY HFS DIRECTORY: C:\HFS\\ [ENTER]
SECONDARY HFS DIRECTORY: [ENTER]
-----

RPC BROKER SITE PARAMETERS file
  Edit or enter a new port number
  The port number must be unique on this server


MAIL GROUP FOR ALERTS: IT SUPPORT// [ENTER]
Select BOX-VOLUME PAIR: V13:CACHE// [ENTER]
BOX-VOLUME PAIR: V13:CACHE// [ENTER]
Select PORT: 9999// [ENTER]
PORT: 9999// [ENTER]
TYPE OF LISTENER: New Style// [ENTER]
STATUS: STOPPED// [ENTER]
CONTROLLED BY LISTENER STARTER: YES// [ENTER]
-----

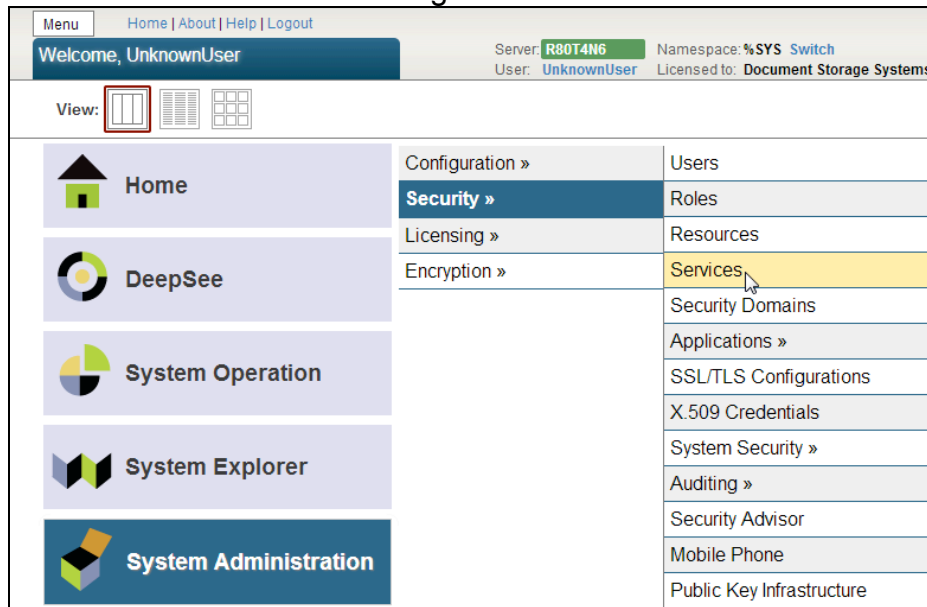
MAILMAN SITE PARAMETERS file . . .
MEDICAL CENTER DIVISION file . . .
MASTER PATIENT INDEX (LOCAL NUMBERS) file . . .
```

9. Close the terminal session.

Security Configuration

Enabling and configuring Telnet Services

1. Right click on the blue Cache cube  and select 'Management Portal'.
2. Navigate to the location shown in the image below and click 'Services'



3. Click '%Services Telnet'

Services

Services are the primary means by which users and computers connect to Caché. The following services are currently available:

Name	Enabled	Public	Authentication Methods	Allowed Connections	Description	Two-Factor Enabled
%Service_Bindings	Yes	N/A	Password, Unauthenticated	Unrestricted	Controls SQL or Objects	No
%Service_CSP	Yes	Yes	Password, Unauthenticated	Unrestricted	Controls CSP Gateway access	No
%Service_CacheDirect	Yes	Yes	Unauthenticated	Unrestricted	Controls Cache Direct	No
%Service_CallIn	Yes	Yes	Unauthenticated	Unrestricted	Controls the Call-In Interface	No
%Service_ComPort	No	Yes	Unauthenticated	Unrestricted	Controls COM ports attached to a Windows system	No
%Service_Console	Yes	Yes	Unauthenticated	Unrestricted	Controls CTERM (TRM:pid) and the Windows Console	No
%Service_DataCheck	No	N/A		Unrestricted	Controls this system as a DataCheck source	No
%Service_ECP	No	N/A		Unrestricted	Controls Enterprise Cache Protocol (ECP)	No
%Service_Login	Yes	No	Password	Unrestricted	Controls SYSTEM.Security.Login	No
%Service_MSMActivate	No	N/A	Unauthenticated	Unrestricted	Controls MSM Activate Protocol	No
%Service_Mirror	No	N/A		Unrestricted	Controls Mirroring	No
%Service_Monitor	No	N/A		Unrestricted	Controls SNMP and remote Monitor commands	No
%Service_Shadow	No	N/A		Unrestricted	Controls if this system can be the source of a shadow	No
%Service_Telnet	No	Yes	Unauthenticated	Unrestricted	Controls Telnet sessions on a Windows server	No
%Service_WebLink	No	N/A	Unauthenticated	Unrestricted	Controls Weblink	No

4. Check the 'Service Enabled' box and then click the 'Save' button.

Note:

Under the Allow Authentication Methods section, check the desired 'Unauthenticated' or 'Password'. The default is Unauthenticated.

5. The Services table will now reflect the Telnet has been enabled. Click 'System' breadcrumb to return to the 'Main' page.

» %Service_Telnet	Yes	Yes	Unauthenticated	Unrestricted	Controls Telnet sessions on a Windows server	No
-------------------	-----	-----	-----------------	--------------	--	----

6. To edit the Telnet port, follow the path as shown below and click the 'Telnet Settings' link.

7. Update the number to the desired Telnet Port and click the Save button. This is not commonly necessary.

Update the WebServerPort

The 'WebServerPort' is not normally updated except in larger multi namespace environments. It is necessary to identify the port number for adding remote Cache connection (not covered in the scope of this document) and for IT Departments.

8. Use the 'System' breadcrumb to return to the 'Main' page, then go to 'System Administration > Configuration > Additional settings > Startup' to edit the 'WebServerPort'.
9. Click the 'Edit' link next to the 'WebServerPort' entry.

Setting	Value	Edit	Help
CallinHalt	true	Edit	Help
CallinStart	true	Edit	Help
ClISysName		Edit	Help
DBSizesAllowed	8192	Edit	Help
DefaultPortBindAddress		Edit	Help
ErrorPurge	30	Edit	Help
IPv6	false	Edit	Help
JobHalt	true	Edit	Help
JobServers	0	Edit	Help
JobStart	true	Edit	Help
MaxCacheTempSizeAtStart	0	Edit	Help
MaxConsoleLogSize	5	Edit	Help
ProcessHalt	true	Edit	Help
ProcessStart	true	Edit	Help
ShutdownTimeout	300	Edit	Help
SystemHalt	true	Edit	Help
SystemStart	true	Edit	Help
TempDirectory	Temp	Edit	Help
TerminalPrompt	8.2	Edit	Help
WebServer	true	Edit	Help
WebServerName		Edit	Help
WebServerPort	57772	Edit	Help
WebServerURLPrefix		Edit	Help
ZSTU	true	Edit	Help

10. Change to the desired port number and click the 'Save' button.

Setting up the unknown User

11. Return to the System Administration page and follow the path as shown in the image below. Click the 'Users' link.

12. Click the 'Edit' link next to the UnknownUser profile.

User	Full Name	Enabled	Namespace	Routine	Type	Edit	Delete	Profile
_PUBLIC	(Internal use - not for login)	No			Cache password user	Edit	-	Profile
_SYSTEM	SQL System Manager	Yes			Cache password user	Edit	-	Profile
Admin	System Administrator	Yes			Cache password user	Edit	Delete	Profile
CSPSystem	CSP Gateway user	Yes			Cache password user	Edit	Delete	Profile
SuperUser	System Super user	Yes			Cache password user	Edit	Delete	Profile
UnknownUser	Unauthenticated user	Yes			Cache password user	Edit	-	Profile

13. Select 'V13' in the 'Startup Namespace:' dropdown.

14. Enter '^ZU' text in the 'Startup Tag^Routine:' textbox.

The screenshot shows the 'Edit User' interface for the user 'UnknownUser'. The 'Startup Namespace' dropdown is set to 'V13' and the 'Startup Tag^Routine' text box contains '^ZU'. The 'User Enabled' checkbox is checked. The 'Expiration Date' field is empty. The 'Two-factor Authentication' section is visible with a 'Mobile phone service provider' dropdown and a 'Mobile phone number' text box. The 'Save' and 'Close' buttons are at the bottom right.

Menu Home | About | Help | Logout System > Security Management > Users > Edit User

Server: PBM22NZ Names User: UnknownUser License

Edit User

Profile

Edit definition for user UnknownUser:

[General] Roles SQL Privileges SQL Tables S

Name*: UnknownUser

Full Name: Unauthenticated user

Comment:

Password*:

Confirm Password*:

Change password on next login: ☐

User Enabled: ☒

Expiration Date: (yyyy-mm-dd)

Startup Namespace: V13

Startup Tag^Routine: ^ZU

Two-factor Authentication

Mobile phone service provider: Create new provider

Mobile phone number:

* Indicates a required field.

Save Close

15. Click the 'Save' button.

16. Click the 'Roles' tab while still in the UnknownUser profile and check the 'Grant Option' checkbox to provide all the necessary permissions. Resaving is not required. Close the 'Management Portal'.

Menu
Home | About | Help | Logout
System > Security Management > Users > Edit User

Edit User
Server: **R80T4N6** Namespace: **%SYS**
User: **UnknownUser** Licensed to: **Document**

Profile

Edit definition for user UnknownUser

General
[Roles]
SQL Privileges
SQL Tables
SQL Views
SQL

UnknownUser is Assigned to the Following Roles	Grant Option	
%All	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Assign user **UnknownUser** to one or more roles:

Available

----- Select One or More -----

%DB_%DEFAULT
%DB_CACHE
%DB_CACHEAUDIT
%DB_CACHELIB
%DB_CACHESYS
%DB_CACHETEMP
%DB_DOCBOOK
%DB_SAMPLES
%DB_USER
%Developer

▶▶▶▶▶

Selected

----- Items Selected -----

◀◀▶▶

Assign
Assign with Grant Option

Hold the [Shift] or [Ctrl] key while clicking to select multiple.

Download and Configuration of PuTTY

PuTTY is a free Telnet and SSH Client for Windows and Unix platforms.

1. Type or copy in the web address below into your web browser (or simply search 'Putty').
<http://www.chiark.greenend.org.uk/~sgtatham/putty/download.html>

PuTTY Download Page

[Home](#) | [Licence](#) | [FAQ](#) | [Docs](#) | [Download](#) | [Keys](#) | [Links](#)
[Mirrors](#) | [Updates](#) | [Feedback](#) | [Changes](#) | [Wishlist](#) | [Team](#)

Here are the PuTTY files themselves:

- PuTTY (the Telnet and SSH client itself)
- PSCP (an SCP client, i.e. command-line secure file copy)
- PSFTP (an SFTP client, i.e. general file transfer sessions much like FTP)
- PuTTYtel (a Telnet-only client)
- Plink (a command-line interface to the PuTTY back ends)
- Pageant (an SSH authentication agent for PuTTY, PSCP, PSFTP, and Plink)
- PuTTYgen (an RSA and DSA key generation utility).

LEGAL WARNING: Use of PuTTY, PSCP, PSFTP and Plink is illegal in countries where encryption is outlawed. I believe it is legal to use PuTTY, PSCP, PSFTP and Plink in England and Wales and in many other countries, but I am not a lawyer and so if in doubt you should seek legal advice before downloading it. You may find [this site](#) useful (it's a survey of cryptography laws in many countries) but I can't vouch for its correctness.

Use of the Telnet-only binary (PuTTYtel) is unrestricted by any cryptography laws.

There are cryptographic signatures available for all the files we offer below. We also supply cryptographically signed lists of checksums. To download our public keys and find out more about our signature policy, visit the [Keys page](#). If you need a Windows program to compute MD5 checksums, you could try the one at [this site](#). (This MD5 program is also cryptographically signed by its author.)

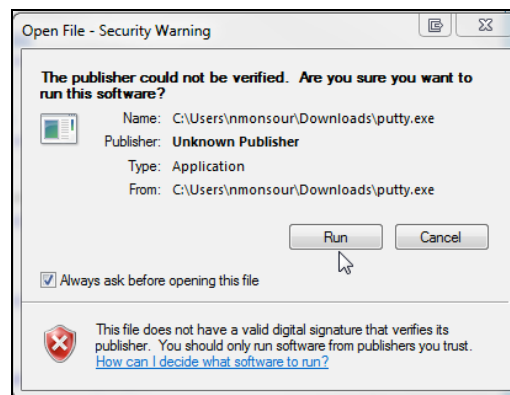
Binaries

The latest release version (beta 0.63). This will generally be a version I think is reasonably likely to work well. If you have a problem with the release version, it might be worth trying out the latest development snapshot (below) to see if I've already fixed the bug, before reporting it to me.

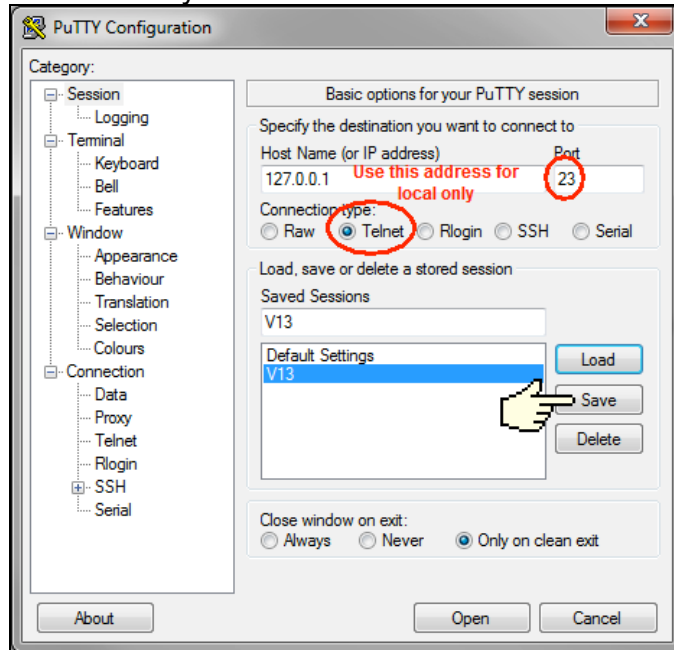
For Windows on Intel x86

PuTTY:	putty.exe	(or by FTP)	(RSA sig)	(DSA sig)
PuTTYtel:	puttytel.exe	(or by FTP)	(RSA sig)	(DSA sig)

2. Select the listed 'PuTTY: putty.exe' file and download it.
3. Run the Putty installer.




4. Input the IP Address of the server where Cache is being run in the 'Host name (or IP address)' textbox. If PuTTY and Cache are being run locally, enter 127.0.0.1.
5. Type the Telnet Port number that was configured in the 'Enabling and configuring Telnet Services' section of the document into the 'Port' textbox. The default is 23.
6. Click the 'Telnet' radio button.
7. Type the name 'V13' into the 'Saved Sessions' textbox.
8. Click 'Save' and it will remain beyond this session for convenient reuse in the future.

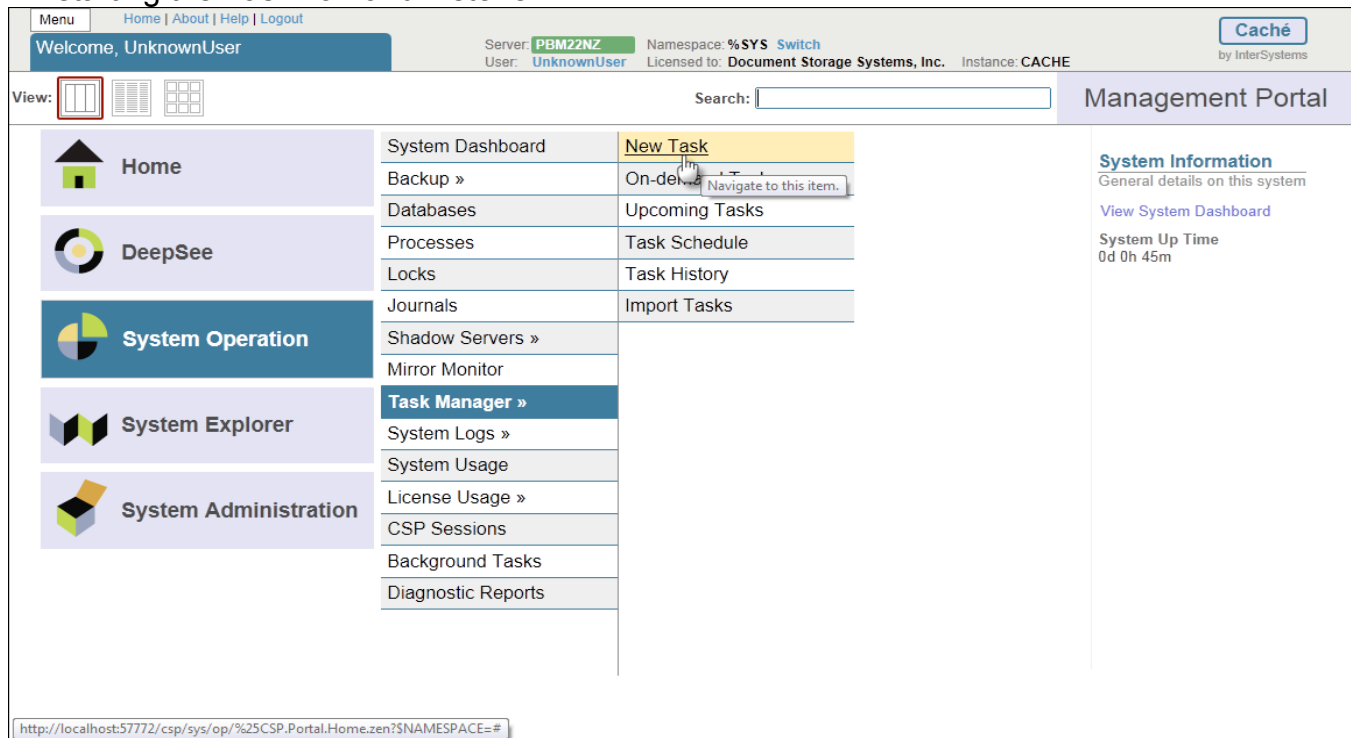


9. Click the 'Open' button to test the connection. If successful a terminal window to the 'V13' environment will display.

Starting Taskman and the Listener

New Task Setup (Initial Installation Only)

1. Right click on the blue Cache cube  and select 'Management Portal'.
2. Select 'System Operation>Task Manager>New Task' to create an "On-demand Task" for starting the Taskman and Listener.



3. Type 'Taskman_Start' into the 'Task name: *' textbox.
4. The 'Description:' textbox is not a required field, but can be used as a reminder that this task will start Taskman and the Listener.
5. Select 'V13' in the 'Namespace to run task in:' dropdown.
6. Type 'D ^ZTMB' into the 'ExecuteCode' textbox.
7. Select 'Priority High' in the 'Task priority:' dropdown.
8. Select 'UnknownUser' in the 'Run task as this user:' dropdown.

9. At completion, your screen should look like the one below. Press 'Next>' to proceed.

Task Scheduler Wizard

This wizard helps to you schedule a task for execution by the Task Manager or to edit the details of a previously scheduled task. For user-defined tasks you must first create a new subclass of the %SYS.Task.Definition class which will then be selectable as a 'Task type'.

Task name: *

Taskman_Start

Description:

Starting Taskman and the Listener

Namespace to run task in:

V13

Task type: *

RunLegacyTask

ExecuteCode

D ^ZTMB

Task priority:

Priority High

Run task as this user:

UnknownUser

Open output file when task is running?

No

Output file:

Browse...

Reschedule task after system restart?

No

< Back

Next >

Finish

Cancel

10. Select 'On demand' in the 'How often do you want the Task Manager to execute this task?' dropdown. Press 'Finish' to set the task.

Task Scheduler Wizard

How often do you want the Task Manager to execute this task?
On demand

< Back

Next >

Finish

Cancel

11. The following screen shows a list of all scheduled tasks, including 'Taskman_Start'. Click 'Task Manager' within the breadcrumbs to return to the 'Task Manager' Main Menu.

Menu Home | About | Help | Logout System > **Task Manager** > Task Schedule

Task Schedule Server: PBM22NZ Namespace: %SYS User: UnknownUser Licensed to: Document Storage Systems, Inc. Instance: CACHE

Refresh: ☐ off ☒ on 10 sec

The following is a list of task scheduled for execution:

Task Name	Task Type	Namespace	Description	ID	Suspended	Last Finished	Next Scheduled	
Switch Journal	System	%SYS	Switches the journal file at midnight every day	1			2013-12-10 00:00	History Run
Purge Journal	System	%SYS	Purges old journal files every night at 12:30 am	2			2013-12-10 00:30	History Run
Purge Tasks	System	%SYS	Purges the task history global every night at 1:00 am	3			2013-12-10 01:00	History Run
Integrity Check	System	%SYS	Integrity check for databases at 2:00 am every Monday	4	Suspend Reschedule		2013-12-16 02:00	History -
Security Scan	System	%SYS	Scans the security database at midnight every day	5			2013-12-10 00:00	History Run
Diagnostic Report	System	%SYS	Send system diagnostic reports to WRC On Demand, and/or on a schedule	6				History Run
Purge Audit Database	System	%SYS	Purges old Audit information after Switch Journal is run	7			Runs After #1	History Run
Inventory Scan	System	%SYS	Run a scan of the system inventory on install or upgrade and on demand thereafter	8		2013-12-06 13:32		History Run
Purge errors and log files	System	%SYS	Purges errors and log files at 1:00 am	9			2013-12-10 01:00	History Run
Check Logging activity	System	%SYS	Check active application logging at 1:00 am	10			2013-12-10 01:00	History Run
Purge Backup Log	System	%SYS	Purges old messages from Cache backup log every night at 1:30 am	11			2013-12-10 01:30	History Run
Taskman_Start	User	V13	Starting Taskman and the Listener	1001				History Run

Starting Taskman and the Listener

Note:

The following steps are required to start Taskman and the Listener at initialization, as well as, upon any restart of the server holding Cache

12. From the Management Portal, select 'System Operation>Task Manager>On-demand Task'

<div>Home</div> <div>DeepSee</div> <div>System Operation</div> <div>System Explorer</div> <div>System Administration</div>	System Dashboard	New Task
	Backup »	On-demand Task
	Databases	Upcoming Tasks
	Processes	Task Schedule
	Locks	Task History
	Journals	Import Tasks
	Shadow Servers »	
	Mirror Monitor	
	Task Manager »	
	System Logs »	
System Usage		
License Usage »		
CSP Sessions		
Background Tasks		
Diagnostic Reports		

13. The window that opens contains a list of tasks that can be run on demand, including 'Taskman_Start' created earlier.
14. Click the 'Run' link located at the end of the 'Taskman_Start' line.

The following is a list of tasks that can be run on demand:

Page size: <input type="text" value="0"/>	Max rows: <input type="text" value="1000"/>	Results: 3	Page: <input type="text" value="1"/> of 1
Task Name	Description		
Diagnostic Report	Send system diagnostic reports to WRC On Demand, and/or on a schedule	Run	
Inventory Scan	Run a scan of the system inventory on install or upgrade and on demand thereafter	Run	
Taskman_Start	Starting Taskman and the Listener	Run	

Run Task

Run Task - Taskman_Start (ID=1001)?

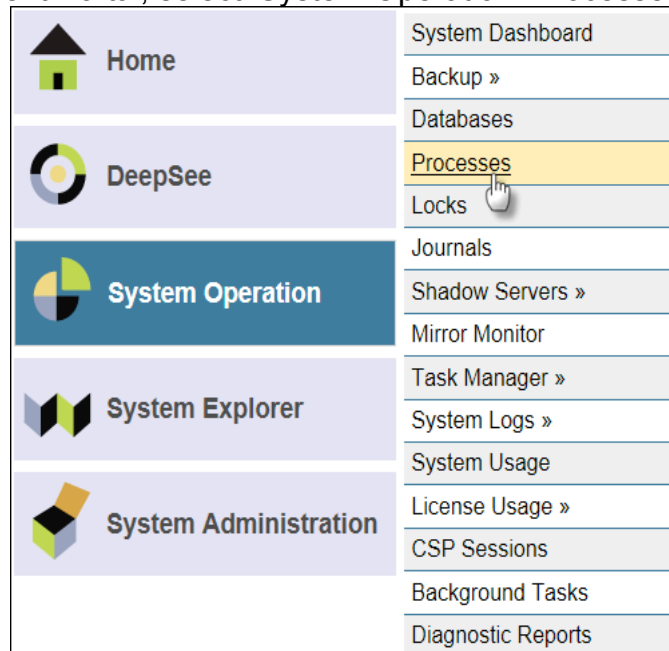
Date to run task: (yyyy-mm-dd)

Time to run task: (hh:mm:ss)

15. Press 'Perform Action Now' button to queue the task and press 'Close' on the following confirmation page.

Taskman and Listener Start-up Verification

16. From the Management Portal, select 'System Operation>Processes'.



17. To verify Taskman and the Listener have started, look next to your Namespace for '%ZTM' for Taskman and '%ZISTCPS', along with the port, for the Listener. Taskman and the Listener may take up to 90 seconds to start, so use the 'Refresh' button to reload the process list periodically.

Menu
Home | About | Help | Logout
System > Processes

Server: **PBM22NZ**
Namespace: %SYS
User: **UnknownUser**
Licensed to: **Document Storage Systems, Inc.**
Instance: **CACHE**

Caché
by InterSystems

Broadcast
Refresh: ☒ off ☐ on 10 sec
Processes

The following is a list of active processes:

Filter:
Page size: 0
Max rows: 1000
Results: 24
Page: 1 of 1


Process ID	User	Device	Namespace	Routine	Commands	Globals	State	Client Name	Client EXE	Client IP	O/S Username	
4144				CONTROL	0	0	RUNW				SYSTEM	-
4772				WRTDMN	197	1047	RUNW				SYSTEM	-
4780				GARCOL	0	0	RUNW				SYSTEM	-
4788				JRNDMN	1599	0	RUNW				SYSTEM	-
4796				EXPDMN	0	0	RUNW				SYSTEM	-
8544	UnknownUser	[TCP]1972 8544	%SYS	%SYS.cspServer2	311865	30028	READ		CSPap.dll		CSP Gateway	Details
2012		\\.nul	%SYS	MONITOR	11985	69	EVTW				SYSTEM	-
4412		\\.nul	%SYS	RECEIVE	5355	289	HANGW				SYSTEM	Details
2072		\\.nul	%SYS	ECWork	0	0	RUNW				SYSTEM	Details
5004		\\.nul	%SYS	CLNDMN	255	21	RUNW				SYSTEM	-
1492		[TCP]1972	%SYS	%SYS.SERVER	255	49	READ				SYSTEM	-
8600	UnknownUser	localhost:1972	%SYS	%SYS.ProcessQuery.1	540906	34817	RUN	localhost	CSPap.dll	::1	CSP Gateway	-
4696		\\.nul	%SYS	LMFMON	5865	69	HANGW				SYSTEM	-
6500	UnknownUser	[TRM]: 6500	V13	XQ	29835	2535	READ	TRM:		127.0.0.1	bhatten	Details
8620	UnknownUser	localhost:1972	%SYS	%SYS.cspServer2	14280	443	READ	localhost	CSPap.dll	::1	CSP Gateway	Details
4444		\\.nul	%SYS	%CSP.Daemon.1	6885	804	HANGW				SYSTEM	-
3148		\\.nul	%SYS	%SYS.Monitor.Control.1	609705	16308	EVTW				SYSTEM	-
1172	TASKMGR	\\.nul	%SYS	%SYS.TaskSuper.1	18870	1540	EVTW				SYSTEM	Details
4400	UnknownUser	\\.nul	V13	%ZTMS1	241740	24894	HANGW				bhatten	Details
8232	UnknownUser	\\.nul	V13	%ZTM	1020	101	LOCK				bhatten	Details
6228	UnknownUser	\\.nul	V13	%ZTM	124440	18358	HANGW				bhatten	Details
1112	UnknownUser	\\.nul	V13	XMKPLQ	17085	1973	HANGW				bhatten	Details
1436	UnknownUser	\\.nul	V13	XMTDT	12240	789	HANGW				bhatten	Details
7248	UnknownUser	[TCP]9999	V13	%ZISTCPS	19125	1635	READ				bhatten	Details

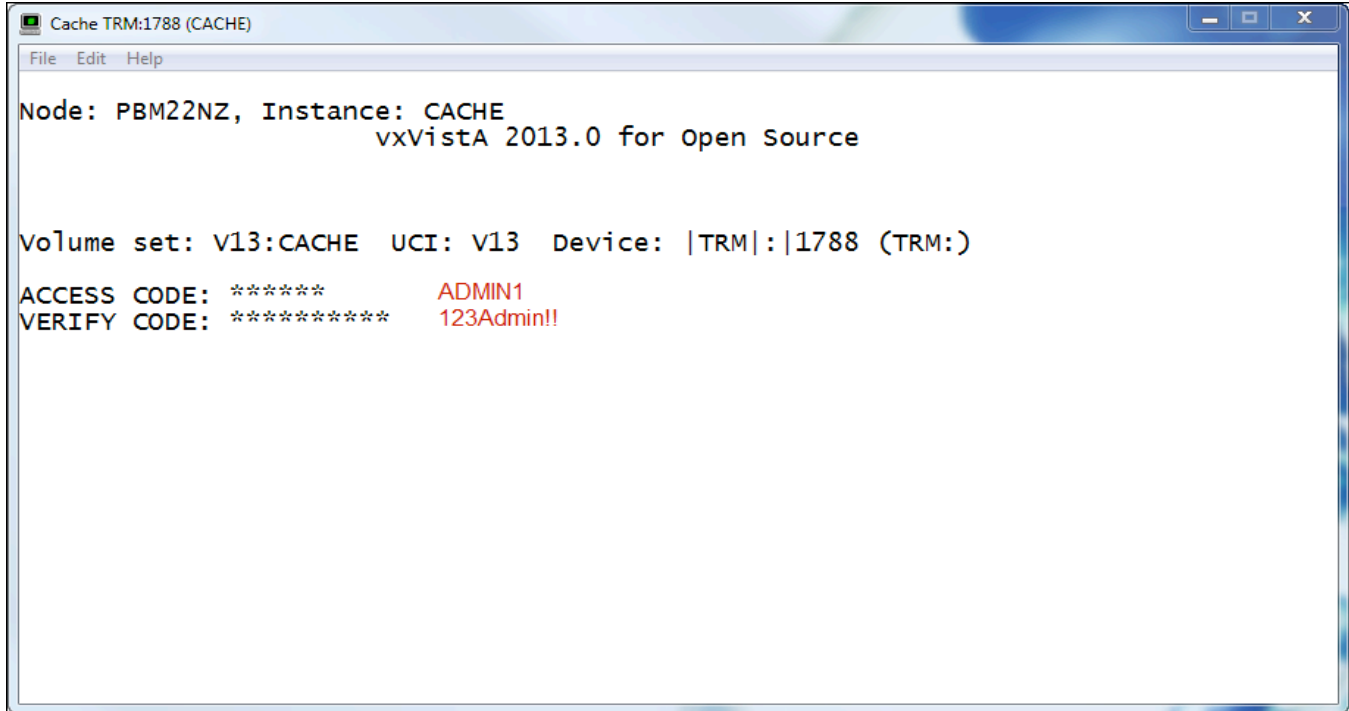
18. Upon verification, close the Management Portal.

19. If after 3 minutes the above indicators fail to populate the 'Processes' list, an 'Alternate Method of Starting Taskman and the Listener' is available in the Appendix.

New User Configuration

Creating a New User via Cloning

1. Right click the blue Cache cube  and select 'Terminal'. Follow the exact terminal notes below.

A screenshot of a terminal window titled 'Cache TRM:1788 (CACHE)'. The window has a menu bar with 'File', 'Edit', and 'Help'. The terminal text shows the node and instance information, the volume set, UCI, and device details. It also displays access and verify codes for a user named ADMIN1.

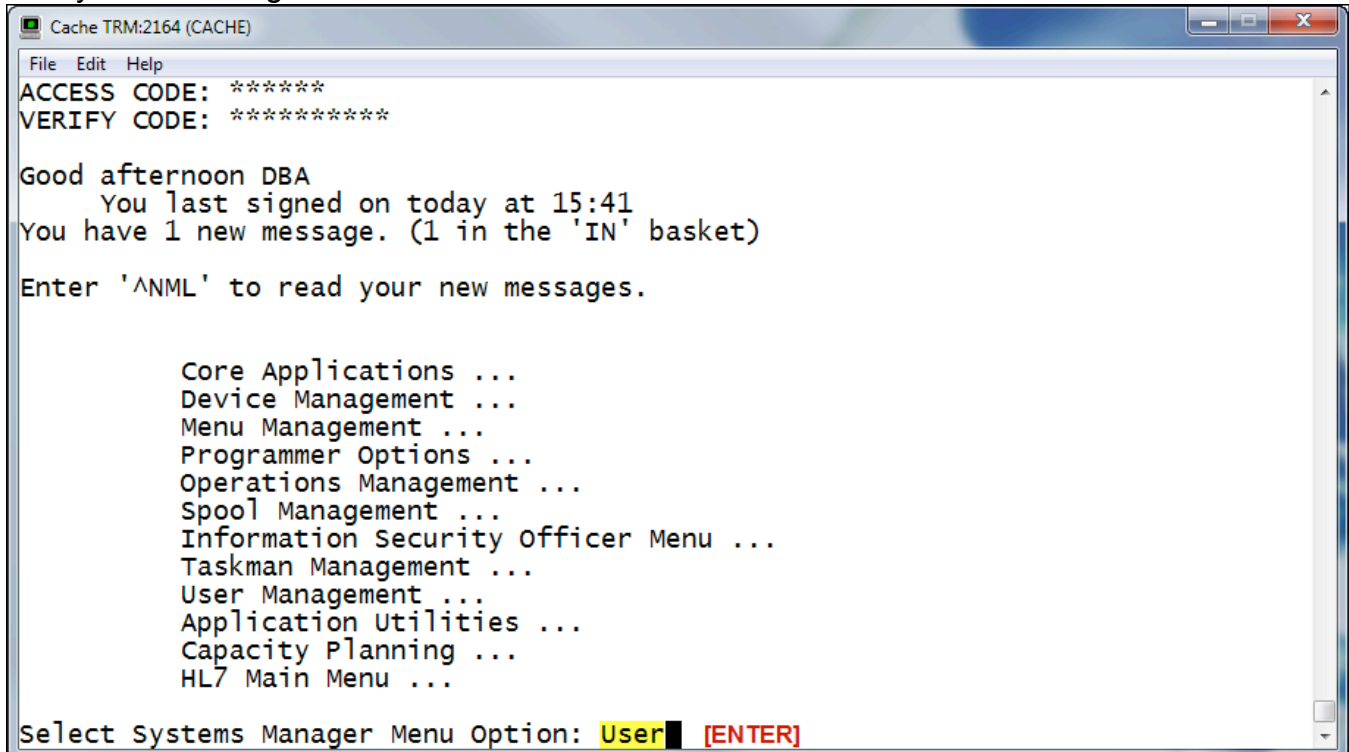
```
Cache TRM:1788 (CACHE)
File Edit Help

Node: PBM22NZ, Instance: CACHE
                        vxVista 2013.0 for Open Source

Volume set: V13:CACHE  UCI: V13  Device: |TRM|:|1788 (TRM:)

ACCESS CODE: ******      ADMIN1
VERIFY CODE: *****      123Admin!!
```

2. Systems Manager Menu

A screenshot of a terminal window titled 'Cache TRM:2164 (CACHE)'. The window has a menu bar with 'File', 'Edit', and 'Help'. The terminal text shows access and verify codes, a greeting, and a list of menu options for the Systems Manager. The prompt 'Select Systems Manager Menu Option:' is followed by 'User' and a cursor, with '[ENTER]' in red text.

```
Cache TRM:2164 (CACHE)
File Edit Help

ACCESS CODE: ******
VERIFY CODE: *****

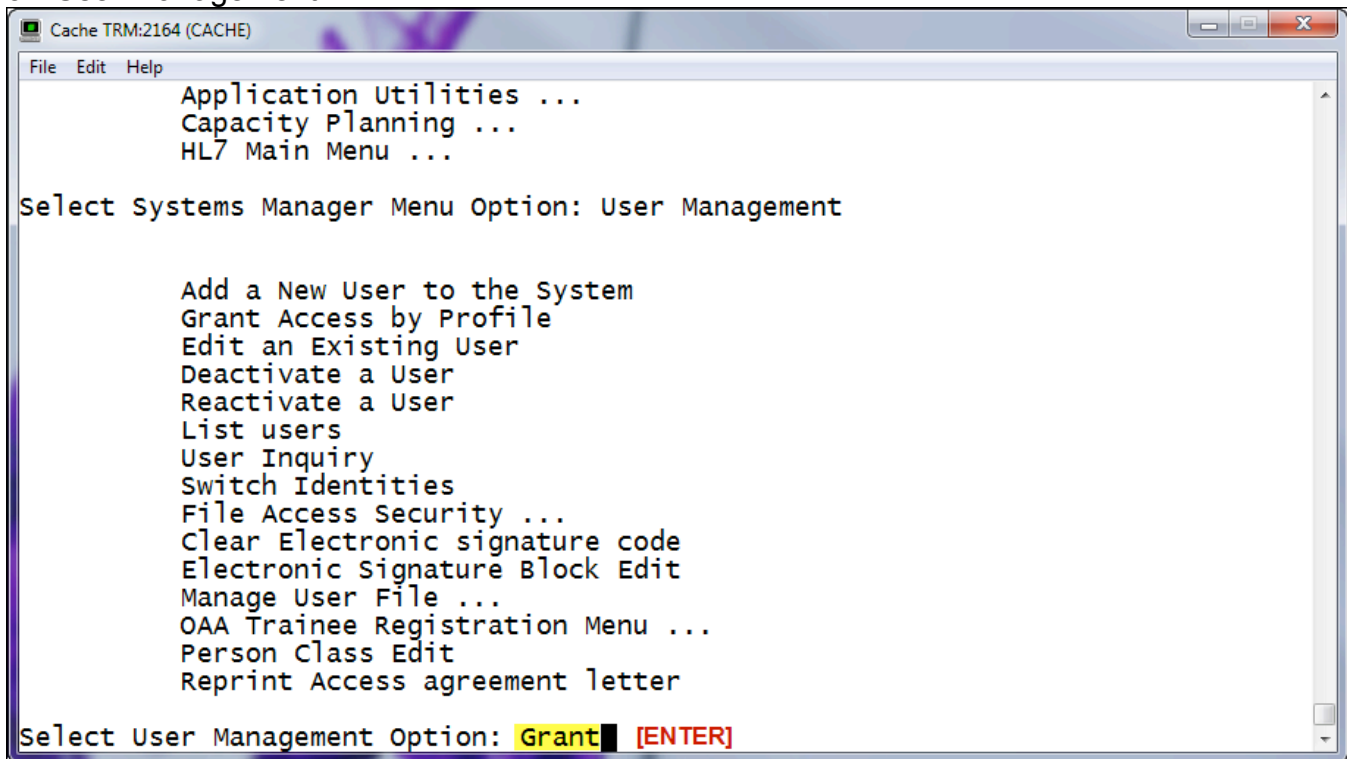
Good afternoon DBA
  You last signed on today at 15:41
You have 1 new message. (1 in the 'IN' basket)

Enter '^NML' to read your new messages.

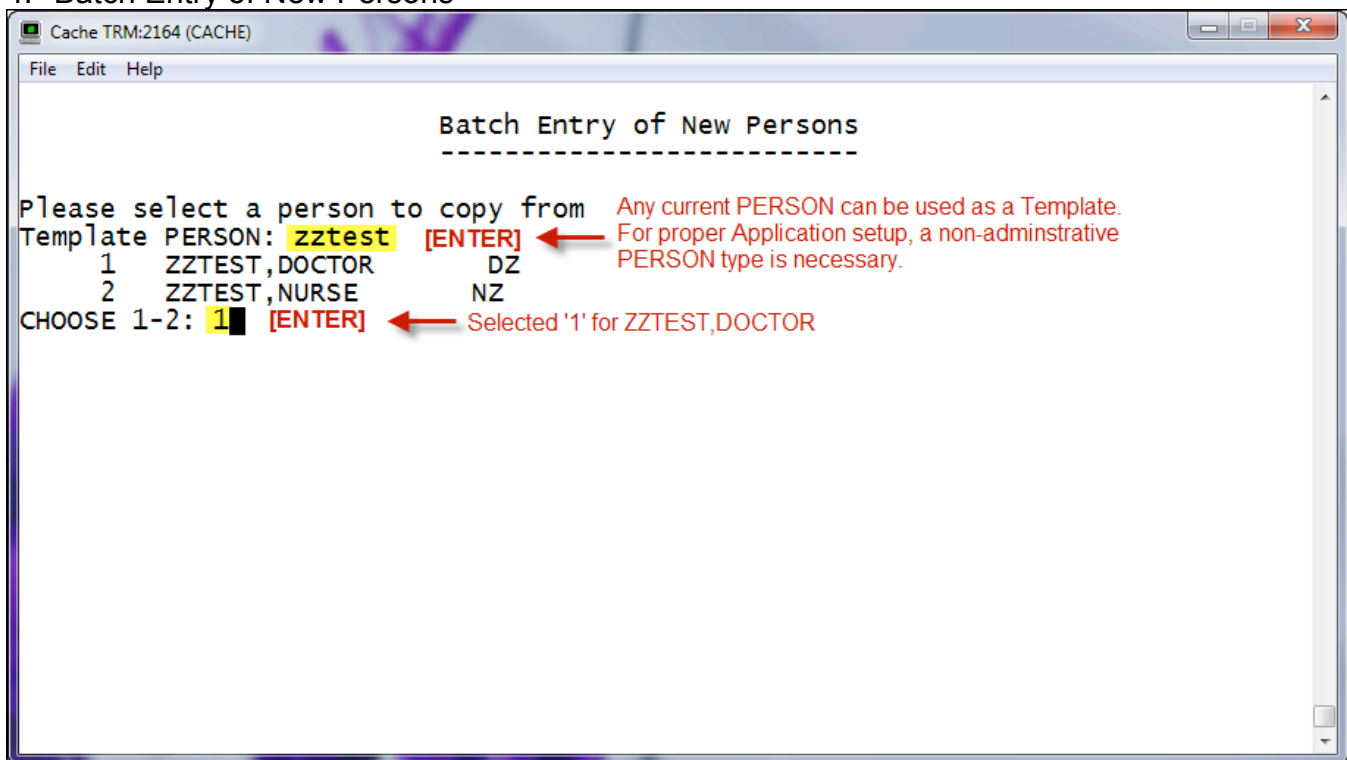
Core Applications ...
Device Management ...
Menu Management ...
Programmer Options ...
Operations Management ...
Spool Management ...
Information Security Officer Menu ...
Taskman Management ...
User Management ...
Application Utilities ...
Capacity Planning ...
HL7 Main Menu ...

Select Systems Manager Menu Option: User [ENTER]
```

3. User Management



4. Batch Entry of New Persons



5. PERSON information is printed to terminal

```
Cache TRM:2164 (CACHE)
File Edit Help
SSN: 800000008
LAST SIGN-ON DATE/TIME: SEP 14, 2009@11:52:19
XUS Logon Attempt Count: 0          XUS Active User: No
Entry Last Edit Date: SEP 10, 2009  TERMINAL TYPE LAST USED: C-VT320
DIVISION: VXVISTA.ORG
NAME COMPONENTS: 200              SERVICE/SECTION: INFORMATION TECHNOLOGY
SIGNATURE BLOCK PRINTED NAME: DOCTOR ZZTEST
KEY: PROVIDER                     GIVEN BY: ADMIN,SYSTEM
DATE GIVEN: AUG 26, 2009
KEY: ORES                         GIVEN BY: ADMIN,SYSTEM
DATE GIVEN: AUG 26, 2009
KEY: OR GN ACCESS                 GIVEN BY: ADMIN,SYSTEM
DATE GIVEN: AUG 26, 2009

Enter RETURN to continue or '^' to exit:
RESTRICT PATIENT SELECTION: NO      AUTO MENU: YES, MENUS GENERATED
TYPE-AHEAD: ALLOWED                 TIMED READ (# OF SECONDS): 999
PRIMARY MENU OPTION: ORZ MAIN MENU CLINICIAN
CPRS TAB: COR                       EFFECTIVE DATE: AUG 24, 2009
AUTHORIZED TO WRITE MED ORDERS: YES
Person Class: Allopathic and Osteopathic Physicians
Effective Date: AUG 01, 2009

Is this the person whose data you want cloned? YES [ENTER]
```

6. The following steps were used to clone a new user ('ZZTEST,NEWUSER') within the current database. That user's Access/Verify Code pair is given in the 'Introduction' section of this document. Please use the following slides as a guide only to clone a new user with a different name.

```
Cache TRM:2164 (CACHE)
File Edit Help
PRIMARY MENU OPTION: ORZ MAIN MENU CLINICIAN
CPRS TAB: COR                       EFFECTIVE DATE: AUG 24, 2009
AUTHORIZED TO WRITE MED ORDERS: YES
Person Class: Allopathic and Osteopathic Physicians
Effective Date: AUG 01, 2009

Is this the person whose data you want cloned? YES

You may enter a date, when the users that are being created/updated
will no longer have access to the system.
Enter (optional) TERMINATION DATE:

Batch Entry of New Persons
-----

Clone of: ZZTEST,DOCTOR
Enter NEW PERSON's name (Family,Given Middle Suffix): ZZTEST,NEWUSER [ENTER]
Are you adding 'ZZTEST,NEWUSER' as a new NEW PERSON (the 65TH)? No// YES [ENTER]
(Yes)
Checking SOUNDEX for matches.
ZZTEST,NURSE
ZZTEST,DOCTOR
ZDSSSTALLING,FRANK
Do you still want to add this entry: NO//YES [ENTER]
```


Cache TRM:2164 (CACHE)

File Edit Help

ZZTEST,NURSE
ZZTEST,DOCTOR
ZDSSSTALLING,FRANK
Do you still want to add this entry: NO//YES
Name components.
FAMILY (LAST) NAME: ZZTEST// [ENTER]
GIVEN (FIRST) NAME: NEWUSER// [ENTER]
MIDDLE NAME: [ENTER]
SUFFIX: [ENTER]
Now for the Identifiers.
INITIAL: NZ [ENTER]
SSN: 800001234?? [ENTER] Oops!
ANSWER MUST BE 9 CHARACTERS IN LENGTH
Already used by ZDSSKENTRA,LEN
SSN: 800012345 [ENTER]
SEX: M MALE [ENTER]
NPI: [ENTER]
Do You Want To Clone PERSON CLASS? NO [ENTER]

Next!
Enter NEW PERSON's name (Family,Given Middle suffix): [ENTER]

Where do you want to print the COMPUTER ACCOUNT NOTIFICATION LETTERS?
DEVICE: HOME// ;P-DEC;80;9999 Console (Cache' on windows) [ENTER]

Adjust 'Name components' and 'Identifiers' as necessary.

At 'Enter NEW PERSON's name...' prompt, another User can be entered following the same steps.

Setting the 'DEVICE:' to ;P-DEC;80;9999 allows the following pages to print to screen in a continuous flow

7. After the 'COMPUTER ACCOUNT NOTIFICATION LETTERS' have printed to screen, you will be returned to the 'User Management' menu.

Cache TRM:8464 (CACHE)

File Edit Help

Add a New User to the System
Grant Access by Profile
Edit an Existing User
Deactivate a User
Reactivate a User
List users
User Inquiry
Switch Identities
File Access Security ...
Clear Electronic signature code
Electronic Signature Block Edit
Manage User File ...
OAA Trainee Registration Menu ...
Person Class Edit
Reprint Access agreement letter

Select User Management Option: Edit an Existing User [ENTER]
Select NEW PERSON NAME: zztest [ENTER]
1 ZZTEST,DOCTOR DZ
2 ZZTEST,NEWUSER NZ
3 ZZTEST,NURSE NZ
CHOOSE 1-3: 2 [ENTER]

- Type the name of your newly cloned user to access their 'Edit an Existing User' screen to setup the User's ACCESS & VERIFY CODES. Use 'Arrow' keys to navigate to the appropriate blocks.

Cache TRM:8464 (CACHE)

File Edit Help

Edit an Existing User

NAME: ZZTEST,NEWUSER Page 1 of 5

NAME... ZZTEST,NEWUSER INITIAL: NZ
 TITLE: NICK NAME:
 SSN: 800012345 DOB:
 DEGREE: MAIL CODE:
 DISUSER: TERMINATION DATE:
 Termination Reason:

PRIMARY MENU OPTION: ORZ MAIN MENU CLINICIAN
 Select SECONDARY MENU OPTIONS:
 Want to edit ACCESS CODE (Y/N): Y FILE MANAGER ACCESS CODE:
 Want to edit VERIFY CODE (Y/N): [ENTER]

Select DIVISION: VXVISTA.ORG
 SERVICE/SECTION: INFORMATION TECHNOLOGY

Enter a new ACCESS CODE <Hidden>: ***** [ENTER] retype and press [ENTER] again

Cache TRM:8464 (CACHE)

File Edit Help

Edit an Existing User

NAME: ZZTEST,NEWUSER Page 1 of 5

NAME... ZZTEST,NEWUSER INITIAL: NZ
 TITLE: NICK NAME:
 SSN: 800012345 DOB:
 DEGREE: MAIL CODE:
 DISUSER: TERMINATION DATE:
 Termination Reason:

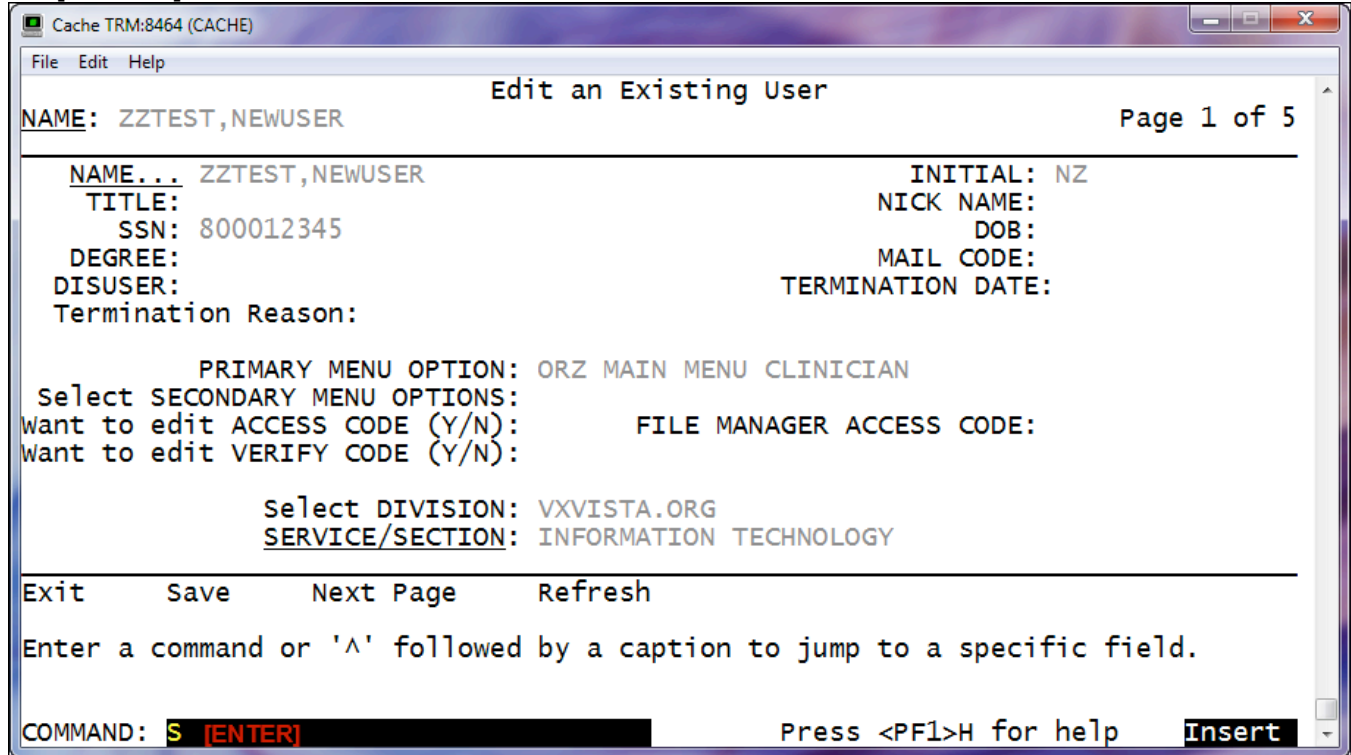
PRIMARY MENU OPTION: ORZ MAIN MENU CLINICIAN
 Select SECONDARY MENU OPTIONS:
 Want to edit ACCESS CODE (Y/N): FILE MANAGER ACCESS CODE:
 Want to edit VERIFY CODE (Y/N): Y

Select DIVISION: VXVISTA.ORG
 SERVICE/SECTION: INFORMATION TECHNOLOGY

Enter a new VERIFY CODE: ***** [ENTER] retype and press [ENTER] again

User will be prompted to change the VERIFY CODE upon first login

9. Use 'Arrow' keys to scroll to bottom of page. Type 'S' then [ENTER] to save. Type 'E' then [ENTER] to exit.



Cache TRM:8464 (CACHE)

File Edit Help

Edit an Existing User

NAME: ZZTEST,NEWUSER Page 1 of 5

NAME... ZZTEST,NEWUSER INITIAL: NZ
TITLE: NICK NAME:
SSN: 800012345 DOB:
DEGREE: MAIL CODE:
DISUSER: TERMINATION DATE:
Termination Reason:

PRIMARY MENU OPTION: ORZ MAIN MENU CLINICIAN
Select SECONDARY MENU OPTIONS:
Want to edit ACCESS CODE (Y/N): FILE MANAGER ACCESS CODE:
Want to edit VERIFY CODE (Y/N):

Select DIVISION: VXVISTA.ORG
SERVICE/SECTION: INFORMATION TECHNOLOGY

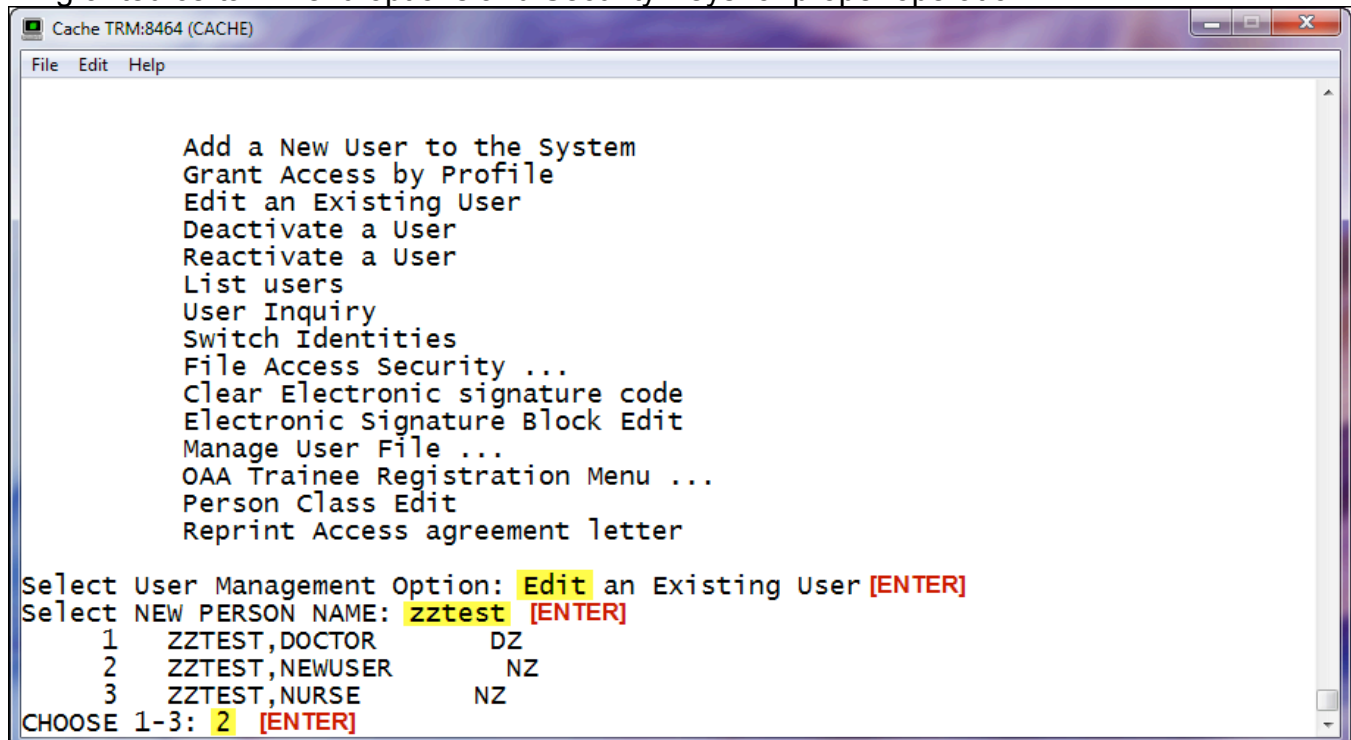
Exit Save Next Page Refresh

Enter a command or '^' followed by a caption to jump to a specific field.

COMMAND: S [ENTER] Press <PF1>H for help Insert

Adding Secondary Menu Options and Security Keys

1. Some vxApps that will be configured later in the installation process require that Users be granted certain Menu options and Security Keys for proper operation.



Cache TRM:8464 (CACHE)

File Edit Help

Add a New User to the System
Grant Access by Profile
Edit an Existing User
Deactivate a User
Reactivate a User
List users
User Inquiry
Switch Identities
File Access Security ...
Clear Electronic signature code
Electronic Signature Block Edit
Manage User File ...
OAA Trainee Registration Menu ...
Person Class Edit
Reprint Access agreement letter

Select User Management Option: Edit an Existing User [ENTER]
Select NEW PERSON NAME: zztest [ENTER]

1 ZZTEST,DOCTOR DZ
2 ZZTEST,NEWUSER NZ
3 ZZTEST,NURSE NZ

CHOOSE 1-3: 2 [ENTER]

- From the 'User Management' menu, use highlighted steps above to enter 'Edit an Existing User'. Follow the steps below to add a required 'Secondary Menu Option'. The following steps only show a single Menu Option being added. A full list of required 'Secondary Menu Options' and 'Security Keys' can be found in the Appendix.

Cache TRM:8464 (CACHE)

File Edit Help

Edit an Existing User

NAME: ZZTEST,NEWUSER Page 1 of 5

NAME... ZZTEST,NEWUSER INITIAL: NZ
 TITLE: NICK NAME:
 SSN: 800012345 DOB:
 DEGREE: MAIL CODE:
 DISUSER: TERMINATION DATE:
 Termination Reason:

PRIMARY MENU OPTION: ORZ MAIN MENU CLINICIAN
 Select SECONDARY MENU OPTIONS: VFDVX CPRS GUI CHART [ENTER]
 Want to edit ACCESS CODE (Y/N): FILE MANAGER ACCESS CODE:
 Want to edit VERIFY CODE (Y/N):

Select DIVISION: VXVISTA.ORG
 SERVICE/SECTION: INFORMATION TECHNOLOGY

vxCPRSChart version 1.28.24.x
 Are you adding 'VFDVX CPRS GUI CHART' as
 a new SECONDARY MENU OPTIONS (the 1ST for this NEW PERSON)? No// Y [ENTER]

Cache TRM:8464 (CACHE)

File Edit Help

Edit an Existing User

NAME: ZZTEST,NEWUSER Page 1 of 5

NAME... ZZTEST,NEWUSER INITIAL: NZ
 TITLE: NICK NAME:
 SSN: 800012345 DOB:
 DEGREE: MAIL CODE:
 DISUSER: TERMINATION DATE:
 Termination Reason:

select SECONDARY MENU OPTIONS
 want to
 want to

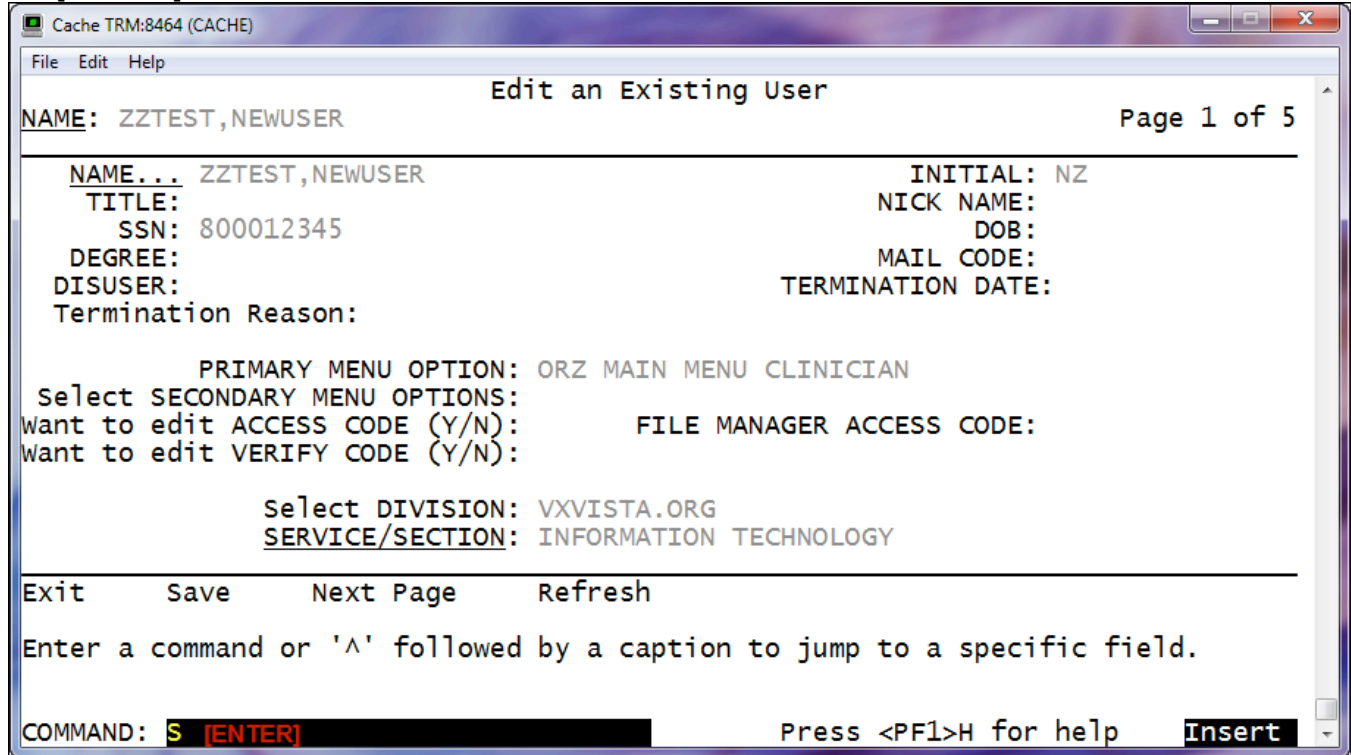
SECONDARY MENU OPTIONS: VFDVX CPRS GUI CHART [ENTER]
 SYNONYM: [ENTER]

Close Refresh

Enter a command or '^' followed by a caption to jump to a specific field.

COMMAND: Close [ENTER] Press <PF1>H for help Insert

3. Use 'Arrow' keys to scroll to bottom of page. Type 'S' then [ENTER] to save. Type 'E' then [ENTER] to exit.



Cache TRM:8464 (CACHE)

File Edit Help

Edit an Existing User

NAME: ZZTEST,NEWUSER Page 1 of 5

NAME... ZZTEST,NEWUSER INITIAL: NZ
TITLE: NICK NAME:
SSN: 800012345 DOB:
DEGREE: MAIL CODE:
DISUSER: TERMINATION DATE:
Termination Reason:

PRIMARY MENU OPTION: ORZ MAIN MENU CLINICIAN
Select SECONDARY MENU OPTIONS:
Want to edit ACCESS CODE (Y/N): FILE MANAGER ACCESS CODE:
Want to edit VERIFY CODE (Y/N):

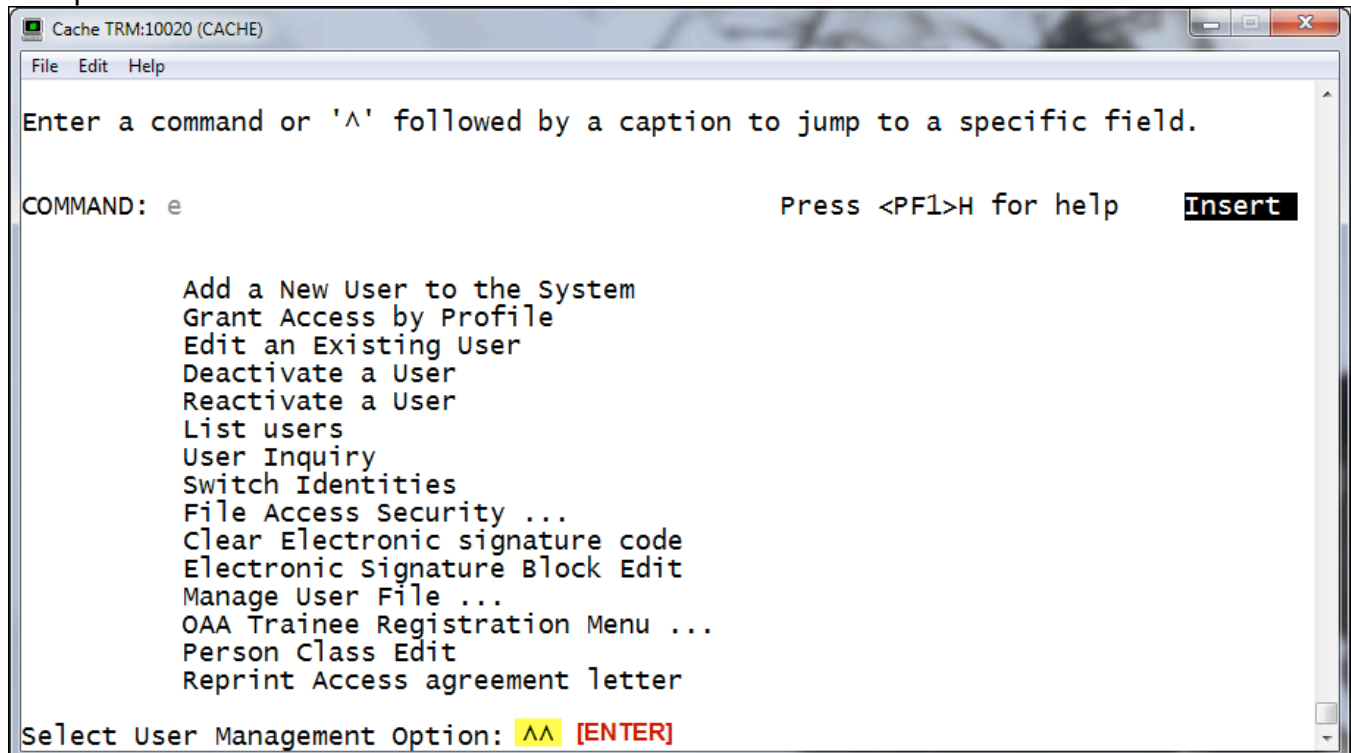
Select DIVISION: VXVISTA.ORG
SERVICE/SECTION: INFORMATION TECHNOLOGY

Exit Save Next Page Refresh

Enter a command or '^' followed by a caption to jump to a specific field.

COMMAND: S [ENTER] Press <PF1>H for help Insert

4. From the 'User Management' menu, type '^' to return to the 'Systems Management Menu'. Typing '^' at most prompts throughout the terminal will return the user to the previous option.



Cache TRM:10020 (CACHE)

File Edit Help

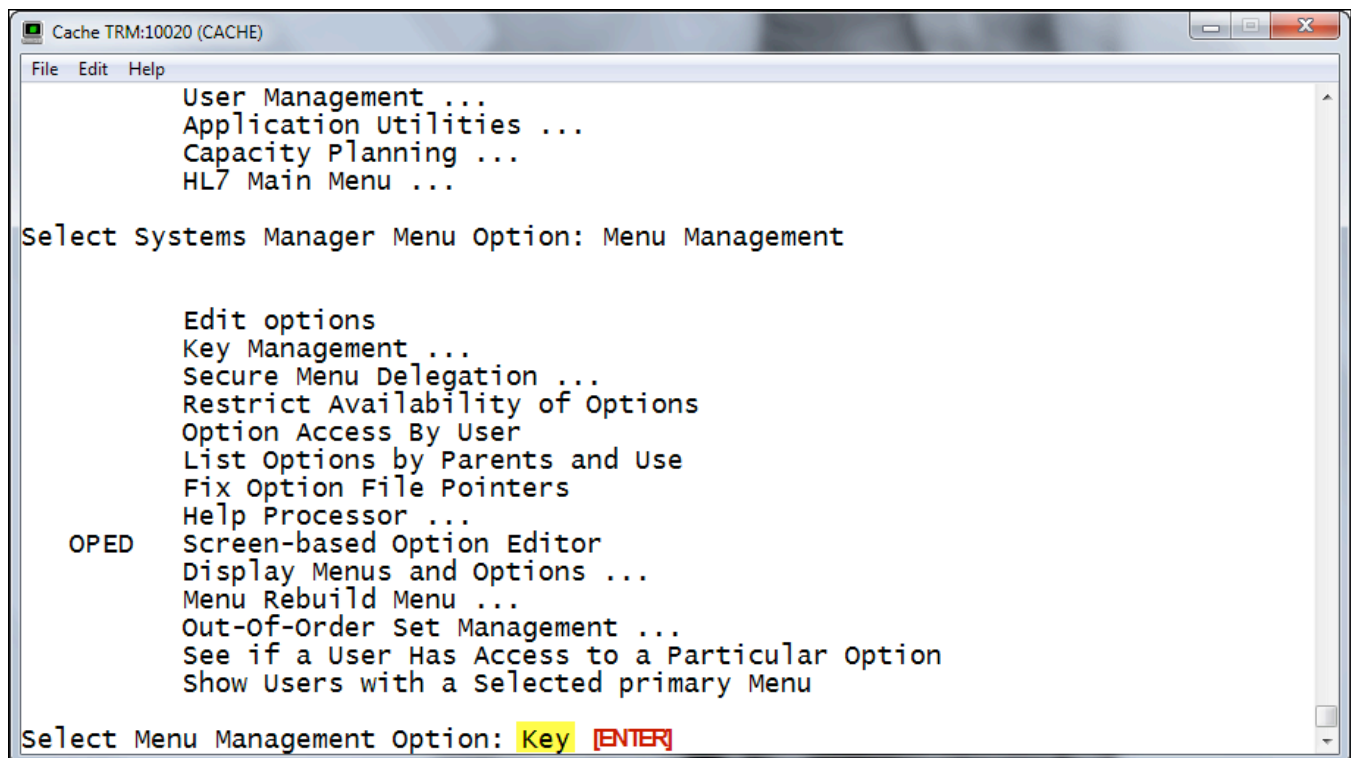
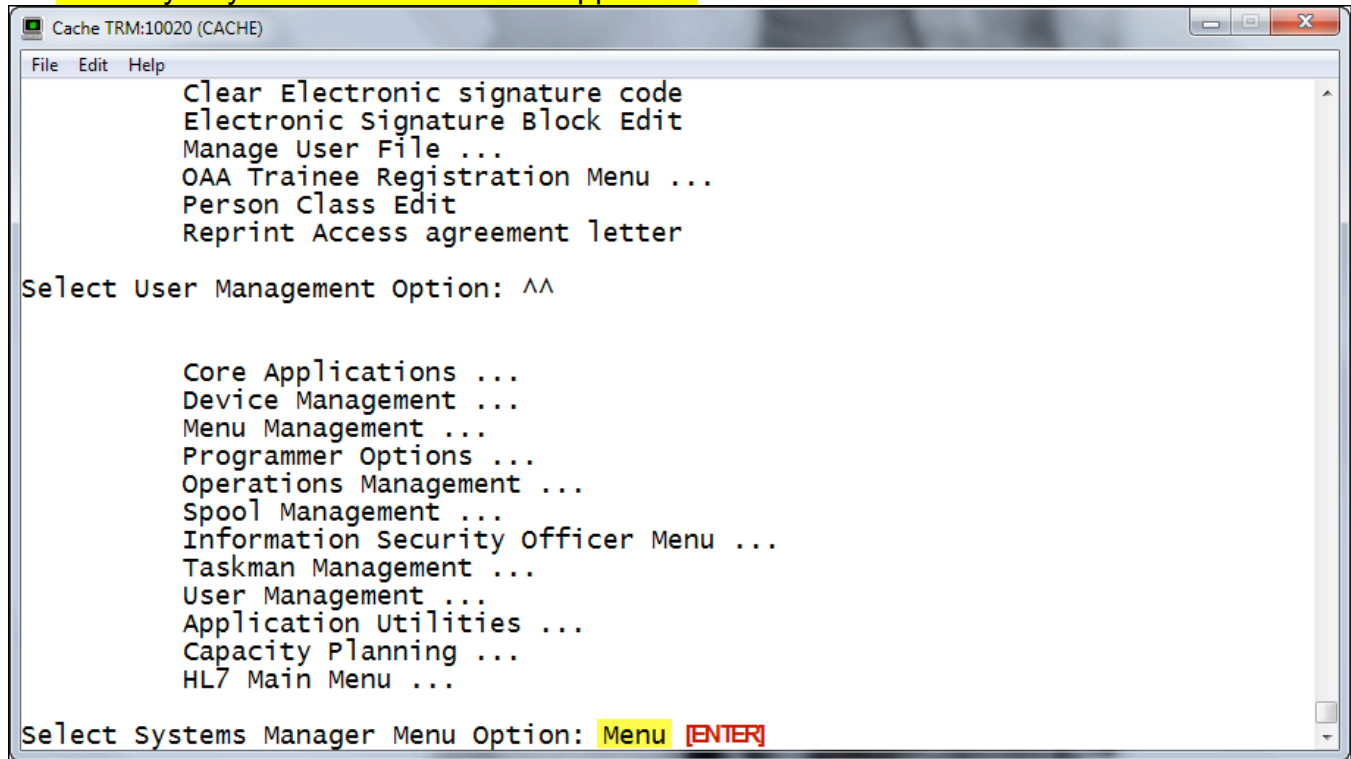
Enter a command or '^' followed by a caption to jump to a specific field.

COMMAND: e Press <PF1>H for help Insert

Add a New User to the System
Grant Access by Profile
Edit an Existing User
Deactivate a User
Reactivate a User
List users
User Inquiry
Switch Identities
File Access Security ...
Clear Electronic signature code
Electronic Signature Block Edit
Manage User File ...
OAA Trainee Registration Menu ...
Person Class Edit
Reprint Access agreement letter

Select User Management Option: ^ [ENTER]

5. Follow the steps below to add a required '**Security Key**'. The following steps only show a single Security Key being added. A full list of required 'Secondary Menu Options' and 'Security Keys' can be found in the Appendix.




```
Cache TRM:10020 (CACHE)
File Edit Help
OPED  Fix Option File Pointers
      Help Processor ...
      Screen-based Option Editor
      Display Menus and Options ...
      Menu Rebuild Menu ...
      Out-Of-Order Set Management ...
      See if a User Has Access to a Particular Option
      Show Users with a Selected primary Menu

Select Menu Management Option: Key Management

      Allocation of Security Keys
      De-allocation of Security Keys
      Enter/Edit of Security Keys
      All the Keys a User Needs
      Change user's allocated keys to delegated keys
      Delegate keys
      Keys For a Given Menu Tree
      List users holding a certain key
      Remove delegated keys
      Show the keys of a particular user

Select Key Management Option: Alloc [ENTER]
```

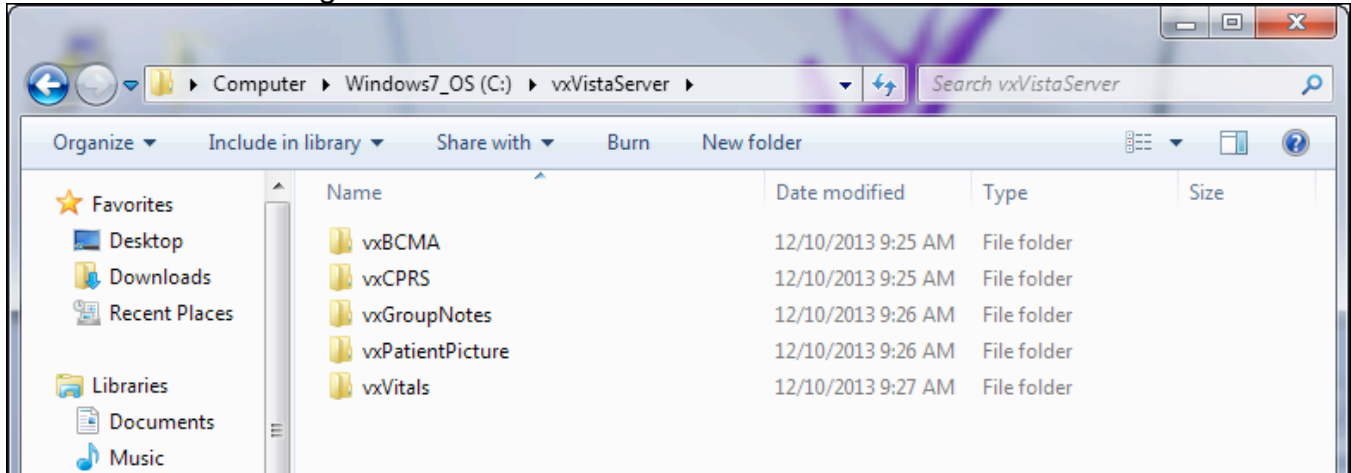
6. Type the name of the security key required at the 'Allocate key:' prompt. Multiple keys can be entered prior to assignment. Required Security Keys can be found in the Appendix.

```
Cache TRM:5324 (CACHE)
File Edit Help
Select Key Management Option: Allocation of Security Keys
Allocate key: OR GN ACCESS [ENTER]
Another key: [ENTER]
Holder of key: zztest,new ZZTEST,NEWUSER NZ [ENTER]
Another holder: [ENTER]
You've selected the following keys:      Multiple keys can be assigned to multiple users
OR GN ACCESS                           simultaneously.
You've selected the following holders:    'OR GN ACCESS' and 'zztest,new' are shown
ZZTEST,NEWUSER                         only as examples.
You are allocating keys. Do you wish to proceed? YES// [ENTER]
OR GN ACCESS being assigned to:
ZZTEST,NEWUSER      Person already holds key - no action taken
```

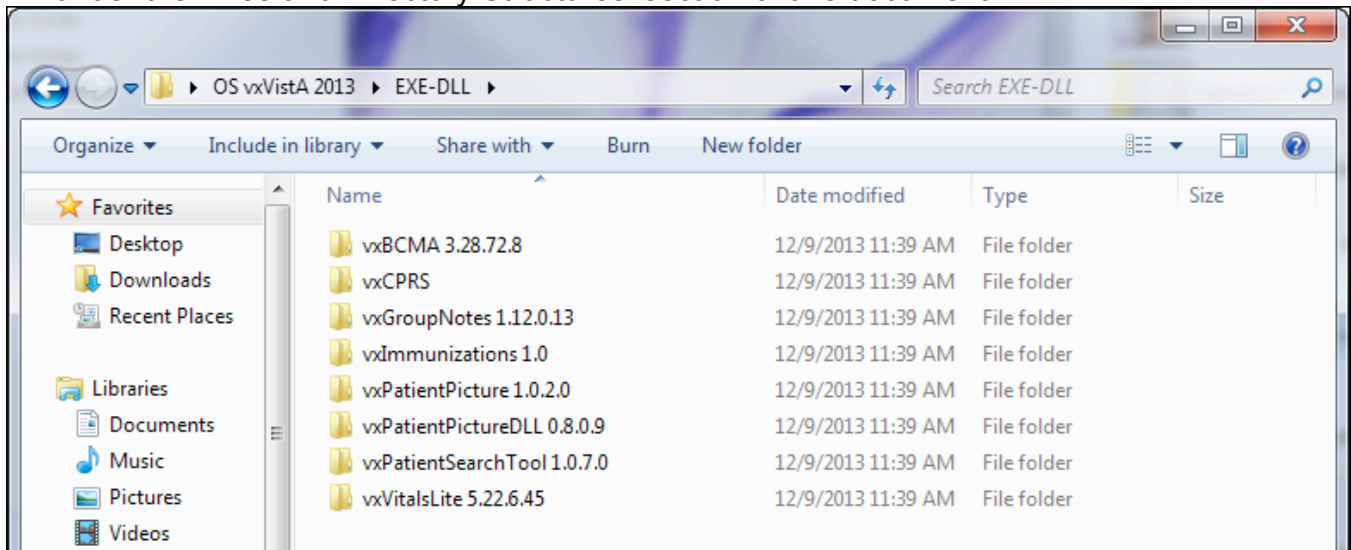
7. After assigning the appropriate Menu Options and Keys, close the terminal.

Configuring Shortcuts and Settings

1. Open the folder 'vxVistaServer' previously created under the 'Files and Directory Structures' section of this document.
2. Create the following folders within 'vxVistaServer':



3. Open the 'EXE-DLL' folder located within the 'OS vxVista 2013' folder previously unzipped under the 'Files and Directory Structures' section of this document.



4. Copy the contents of the folders found in 'EXE-DLL' into the appropriate folders created in 'vxVistaServer' as shown in the following table:

Found In Folder (EXE-DLL)	Files To Copy	Copy To Folder(s) (vxVistaServer)
vxBCMA 3.28.72.8	<ul style="list-style-type: none"> BcmaOrderCom.dll vxBCMA.exe vxBCMApar.exe borIndmm.dll 	vxBCMA
vxCPRS\vxCPRS 1.28.24.7.1 - VistA 2013	<ul style="list-style-type: none"> borIndmm.dll vxCPRSChart.exe 	vxCPRS
vxGroupNotes 1.12.0.13	<ul style="list-style-type: none"> vxGroupNotes.exe 	vxGroupNotes
vxImmunizations 1.0	<ul style="list-style-type: none"> ImmunizationAdministration.dll 	vxCPRS
vxPatientPicture 1.0.2.0	<ul style="list-style-type: none"> vxPatientPicture.exe vxPatientPicture.ini 	vxPatientPicture
vxPatientPictureDLL 0.8.0.9	<ul style="list-style-type: none"> vxPatientImages.dll 	vxPatientPicture vxBCMA vxCPRS
vxPatientSearchTool 1.0.7.0	<ul style="list-style-type: none"> DSSPatientRecordSearch.dll ProgBarAnimated.avi 	vxCPRS
vxVitalsLite 5.22.6.45	<ul style="list-style-type: none"> vxGMV_VitalsViewEnter.dll vxVitals.exe 	vxVitals vxCPRS
vxVitalsLite 5.22.6.45	<ul style="list-style-type: none"> vxVitalsManager.exe 	vxVitals

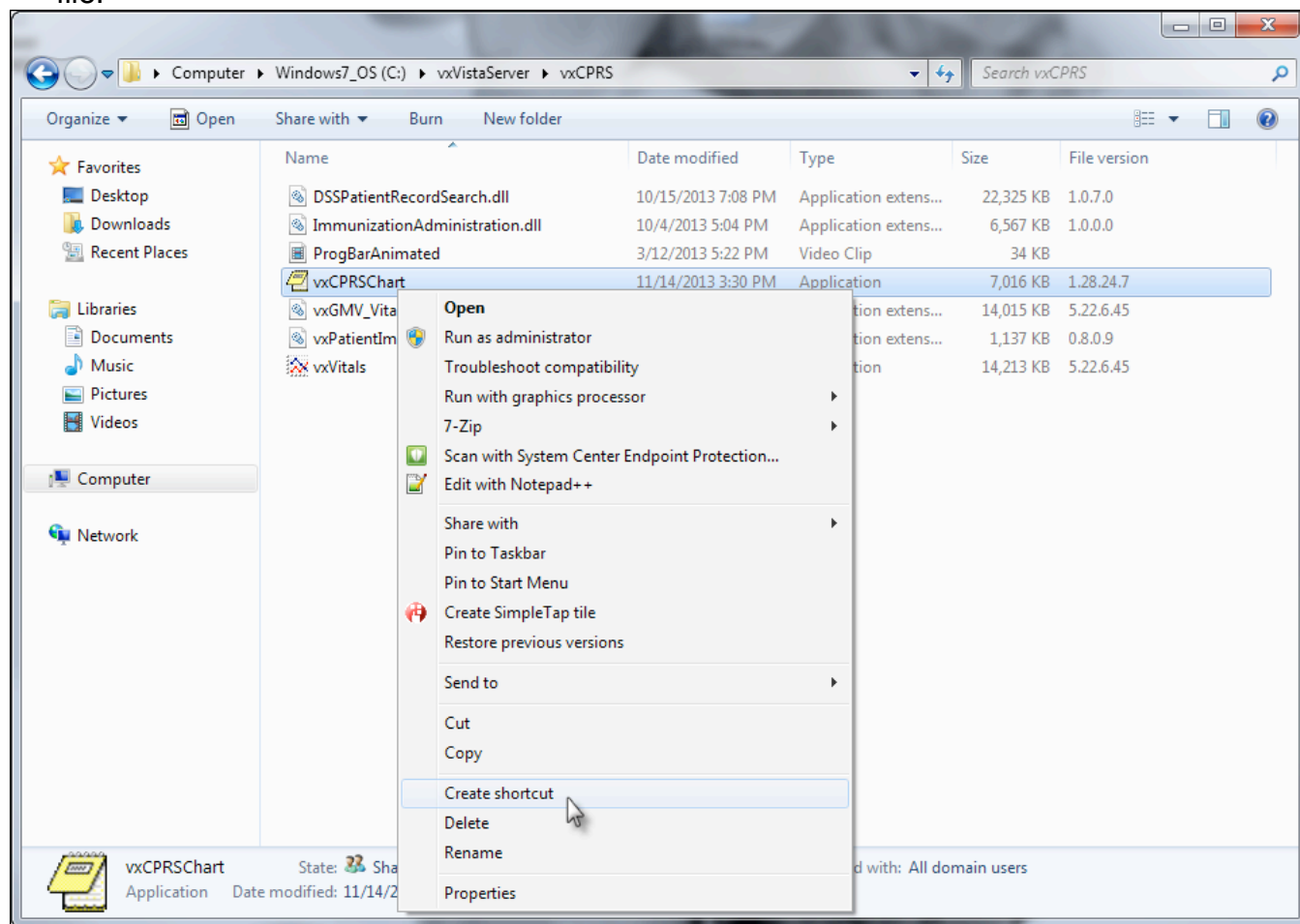
5. Create a folder named 'vxVista Applications' (commonly placed on the Desktop for ease of access)
6. Create shortcuts from all the existing executables within the 'vxVistaServer' folder as shown below:

```

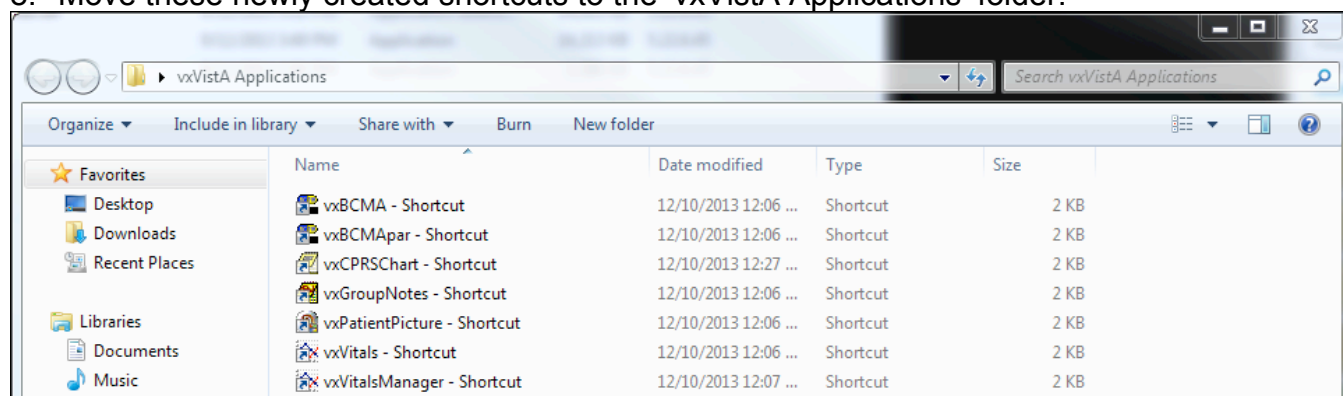
\\VxVistaServer\vxCPRS\vxCPRSChart.exe
\\VxVistaServer\vxBCMA\vxBCMA.exe
\\VxVistaServer\vxBCMA\vxBCMAPar.exe
\\VxVistaServer\vxGroupNotes\vxGroupNotes.exe
\\VxVistaServer\vxPatientPicture\vxPatientPicture.exe
\\VxVistaServer\vxVitals\vxVitals.exe
\\VxVistaServer\vxVitals\vxVitalsManager.exe

```


7. To create a short cut, right click on the .exe files shown in the paths above and select 'Create Shortcut' option. A shortcut will instantly appear in the same location as the .exe file.



8. Move these newly created shortcuts to the 'vxVista Applications' folder.

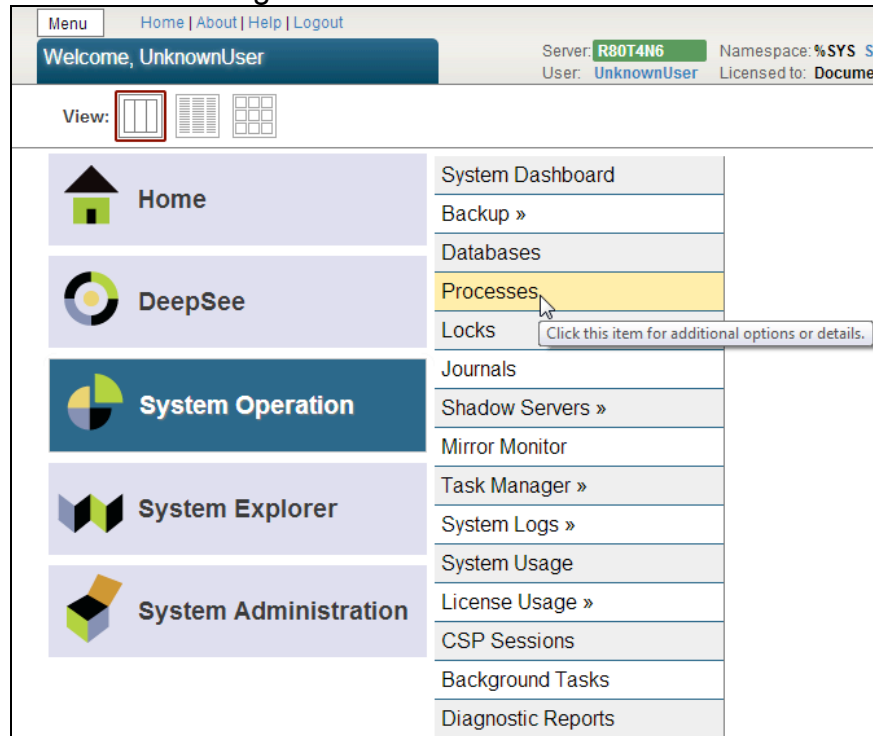


9. Right click on the 'vxBCMA – Shortcut' icon and select 'properties'.

10. Click the 'Shortcut' tab and update the 'Target:' textbox by adding the S & P parameter values for the Cache server to the end of the target file path as follows:

'[SPACE]S=[server name here][SPACE]P=[Port Number Here]'

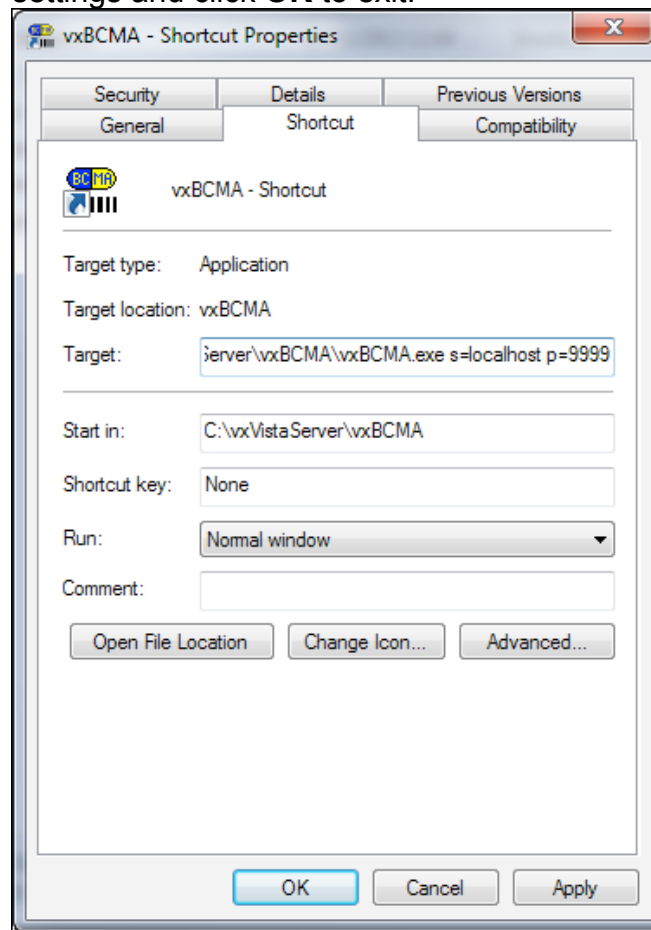
- 'S=' This is the server name or IP Address.
- 'P=' the port used by the Namespace instance that was displayed during the FOIZ process or can be found by following the image below to the Processes section on the Management Portal.



- Click twice on the Namespace heading to sort the list and identify the |TCP| entry. The port is the string of numbers immediately following it.

Processes											
The following is a list of active processes:											
Process ID	User	Device	Namespace	Routine	Commands	Globals	State	Client Name	Client EXE	Client IP	O/S Username
7212	UnknownUser	//./nul	V13	%ZTMS1		58650	5902 HANGW				nmmonsour
7384	UnknownUser	//./nul	V13	%MKPLQ		16830	1712 HANGW				nmmonsour
1532	UnknownUser	//./nul	V13	%ZISTCPS		2933775	637749 READ				nmmonsour
11108	UnknownUser	//./nul	V13	%MTDT		17340	1330 HANGW				nmmonsour
6052	UnknownUser	//./nul	V13	%ZTM		11985	1894 HANGW				nmmonsour
9916	UnknownUser	[TRM]:9916	V13	shell		28560	2374 READ	TRM		127.0.0.1	nmmonsour

11. Click **Apply** to apply settings and click **OK** to exit.



12. Repeat steps 9-11 for the remaining shortcuts.

13. Shortcuts may be installed on other workstations within the LAN. If doing so:

- a. Ensure that the S= parameter is set to the hostname or IP address of the server running Cache.
- b. Create the shortcuts while navigating to the applications from a fully qualified pathed folder, not a folder opened locally.
 - i. To open the fully qualified path Explorer window, click 'Start' or the round Window icon.



- ii. Depending on the version of Windows the computer is running, in the 'Search programs...' if using Windows 7 (or Run if older than Windows 7) textbox type the name of the computer that Cache is installed on with the leading '\\' followed by the Computer name. The resulting window that opens up should look like the image below with the leading 'Network' (the computer name will be different).

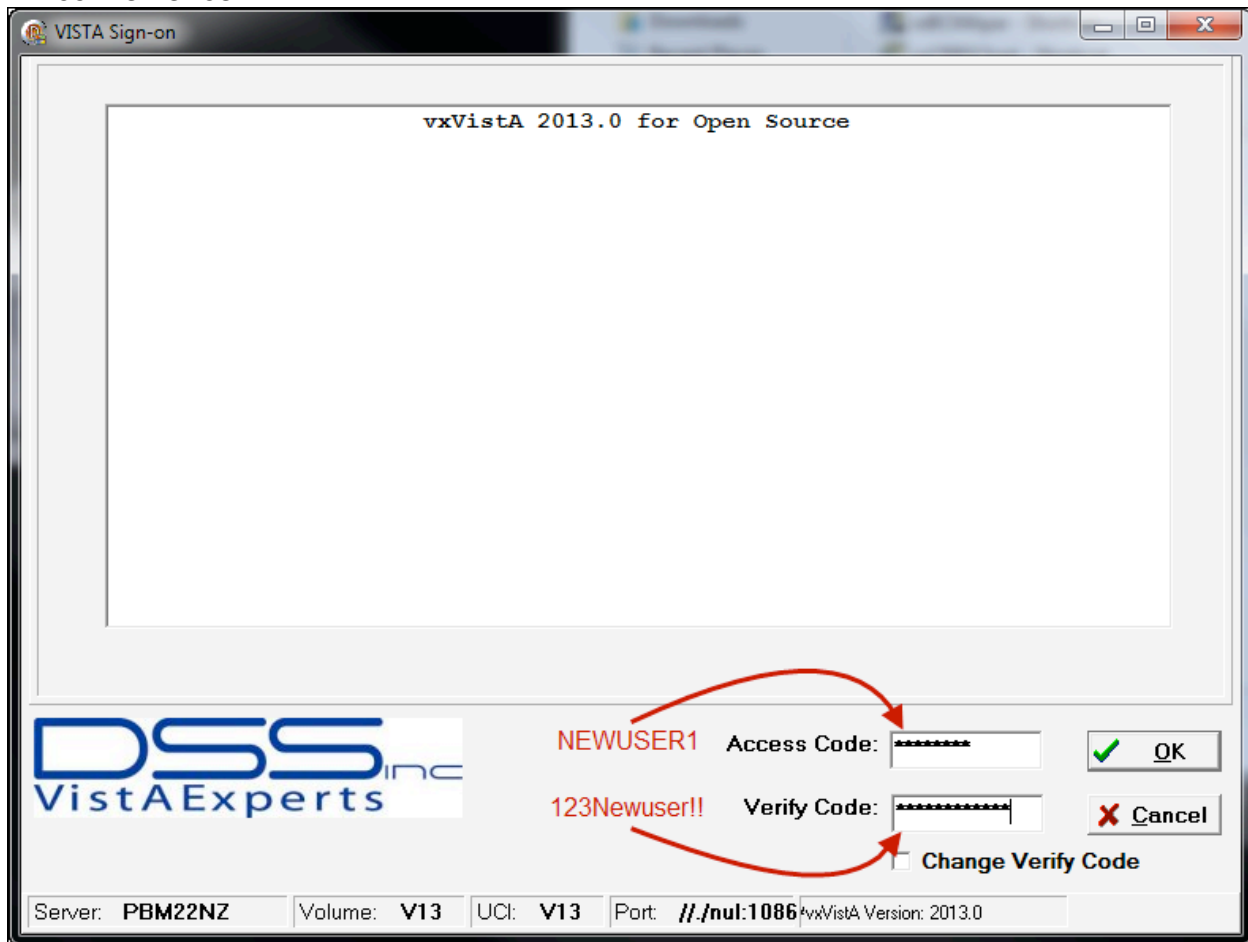


c.

Setup of vxPatient Picture

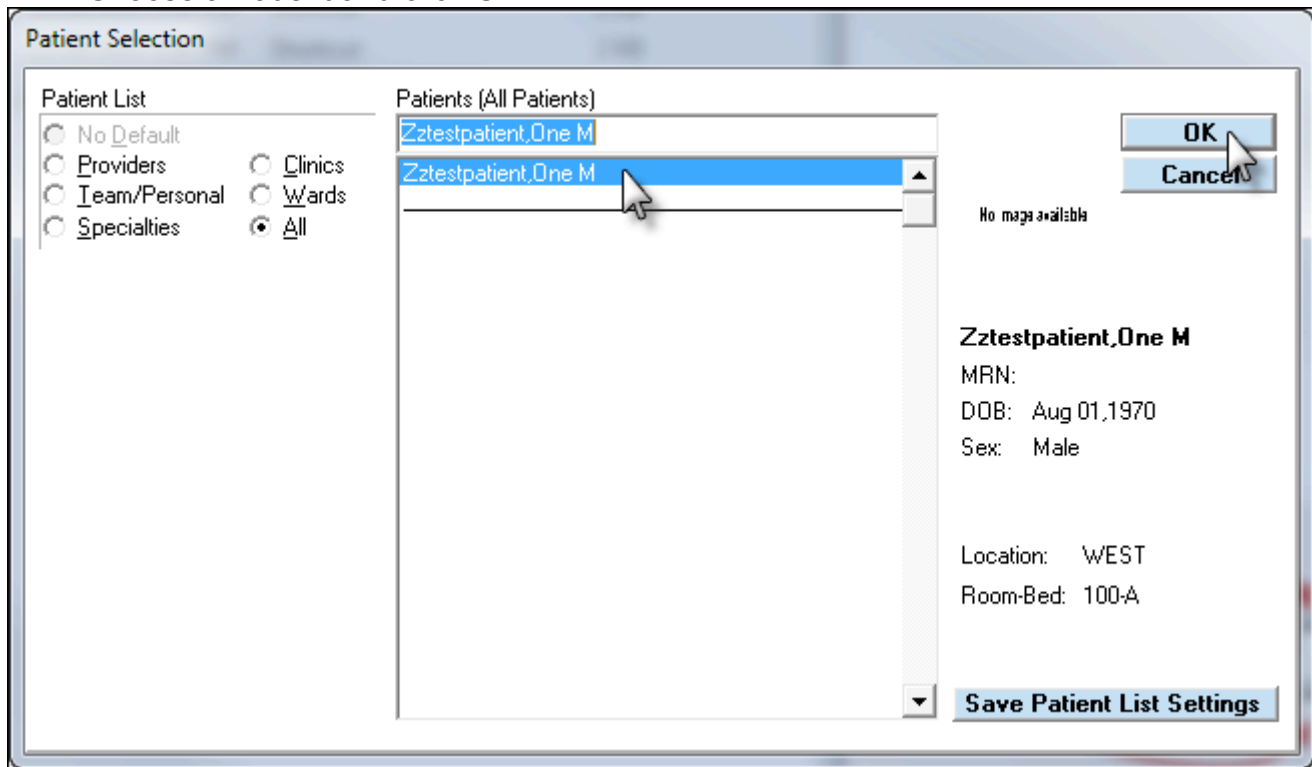
Some additional steps are required after 'Configuring Shortcuts and Settings' to ensure that vxPatientPicture works properly. They are as follows:

1. Double click the shortcut for 'vxPatientPicture' located in the 'vxVistA Applications' folder created earlier. Upon first-run of vxPatientPicture, use the Access/Verify Code pair of a User with Administrative privileges. The 'Standard' user shown at the beginning of this document has been given Administrative rights to vxPatientPicture for convenience.

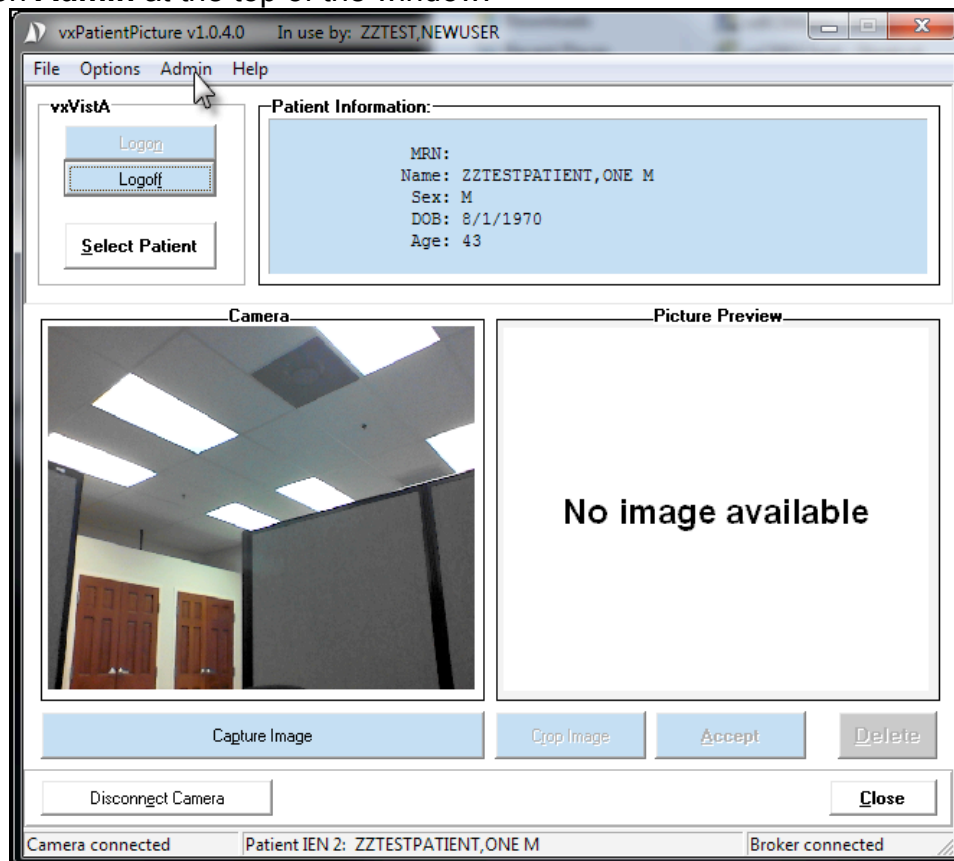
**Note:**

The 'Administrative' user's Access/Verify Code pair provided at the beginning of this document should not be used in vxPatientPicture, as some of its privileges can cause unintended effects.

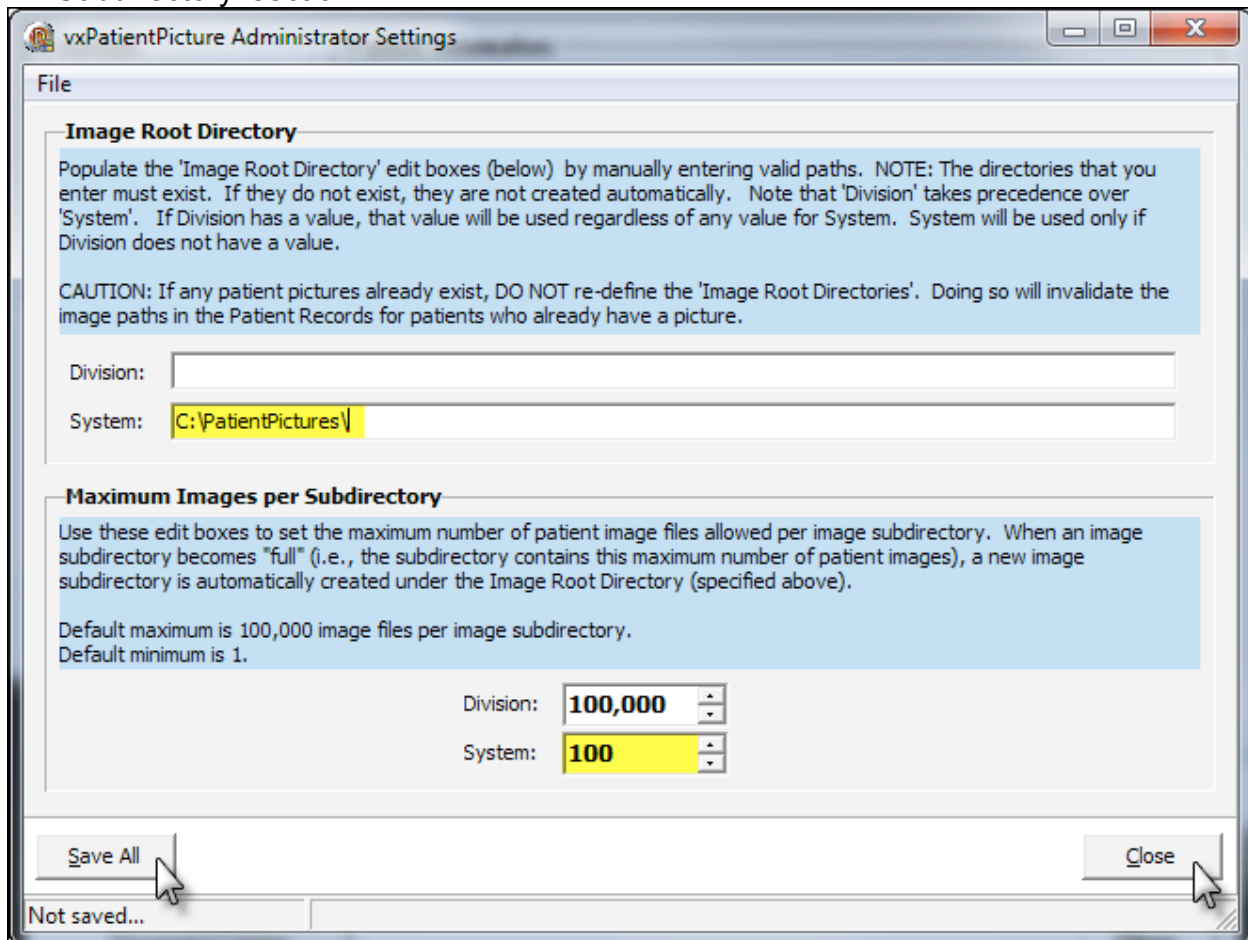
2. Choose a Patient and click **OK**.



3. Click on **Admin** at the top of the window.



4. Type the path for the folder in the 'System:' textbox where images created by vxPatientPicture will be stored. Subfolders will be automatically created upon initialization and according to the values listed in the 'Maximum Images per Subdirectory' section.

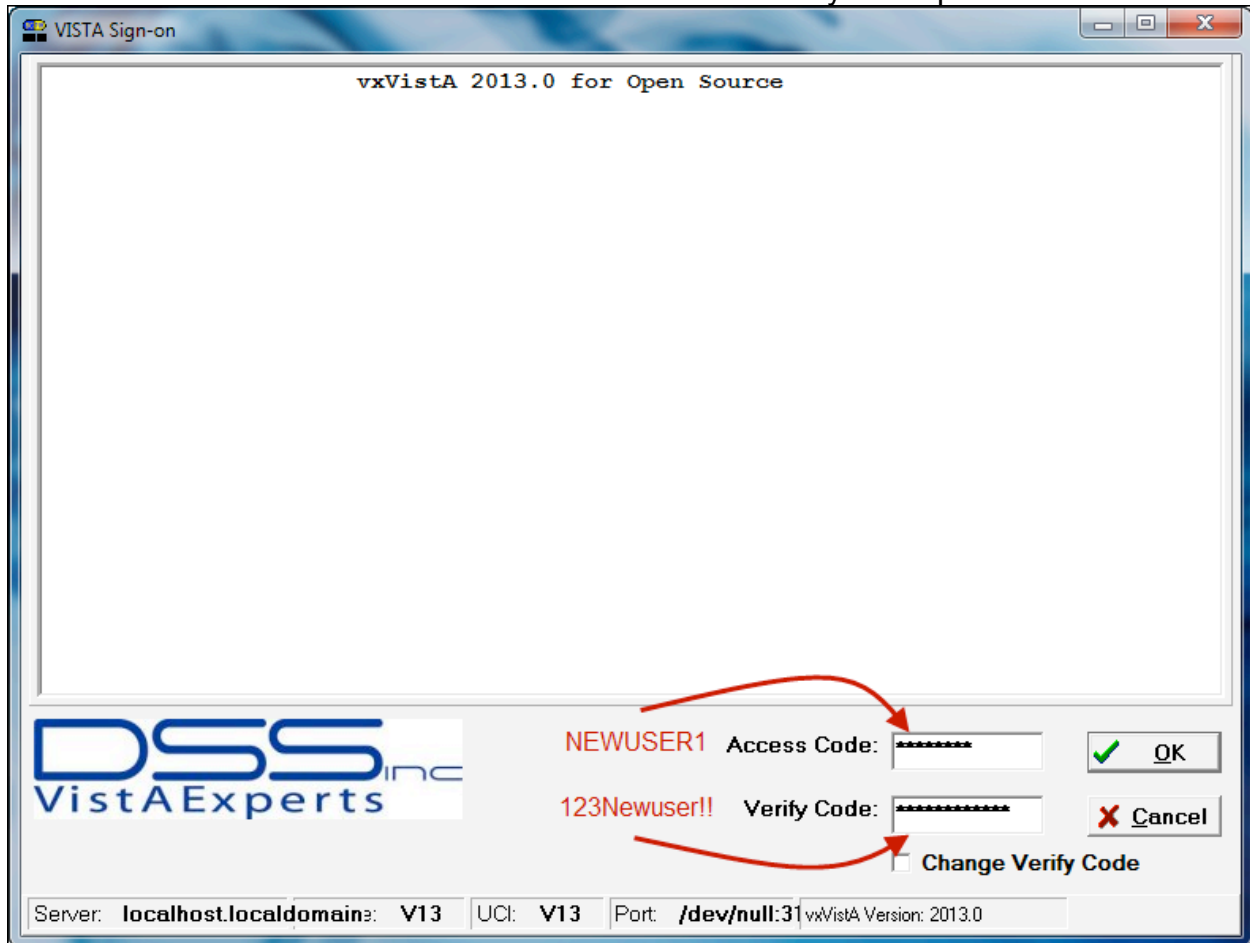


5. Click **Save All** and then **Close**. vxPatientPicture is now configured for use.

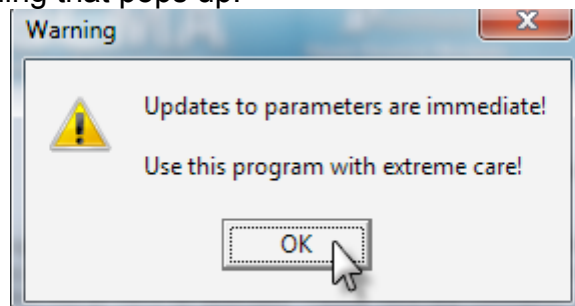
Setup of vxBCMA

Some additional steps are required after 'Configuring Shortcuts and Settings' to ensure that vxBCMA works properly. They are as follows:

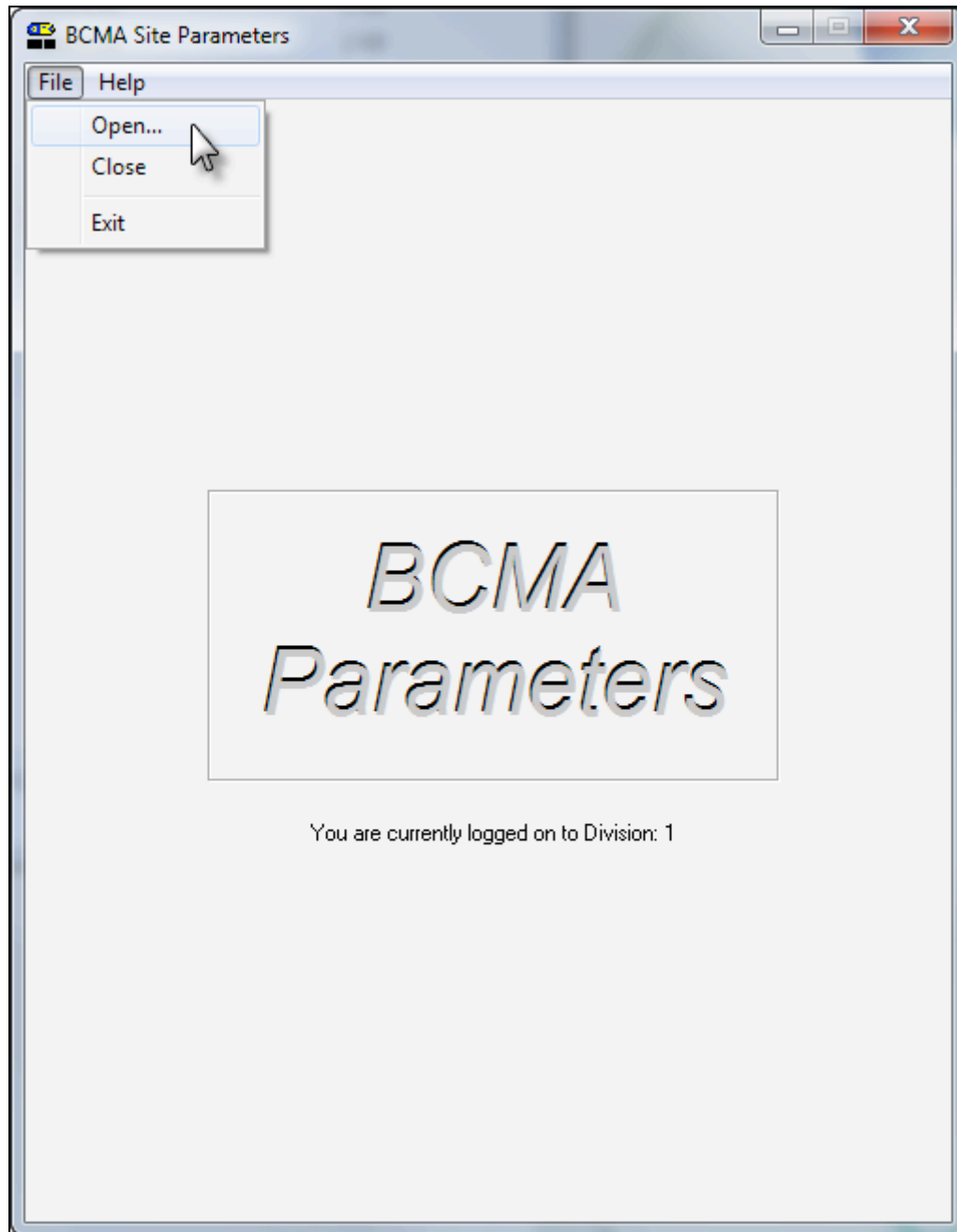
1. Double click the shortcut for 'vxBCMApar' located in the 'vxVista Applications' folder created earlier. Enter the Standard user's Access/Verify Code pair as shown below.



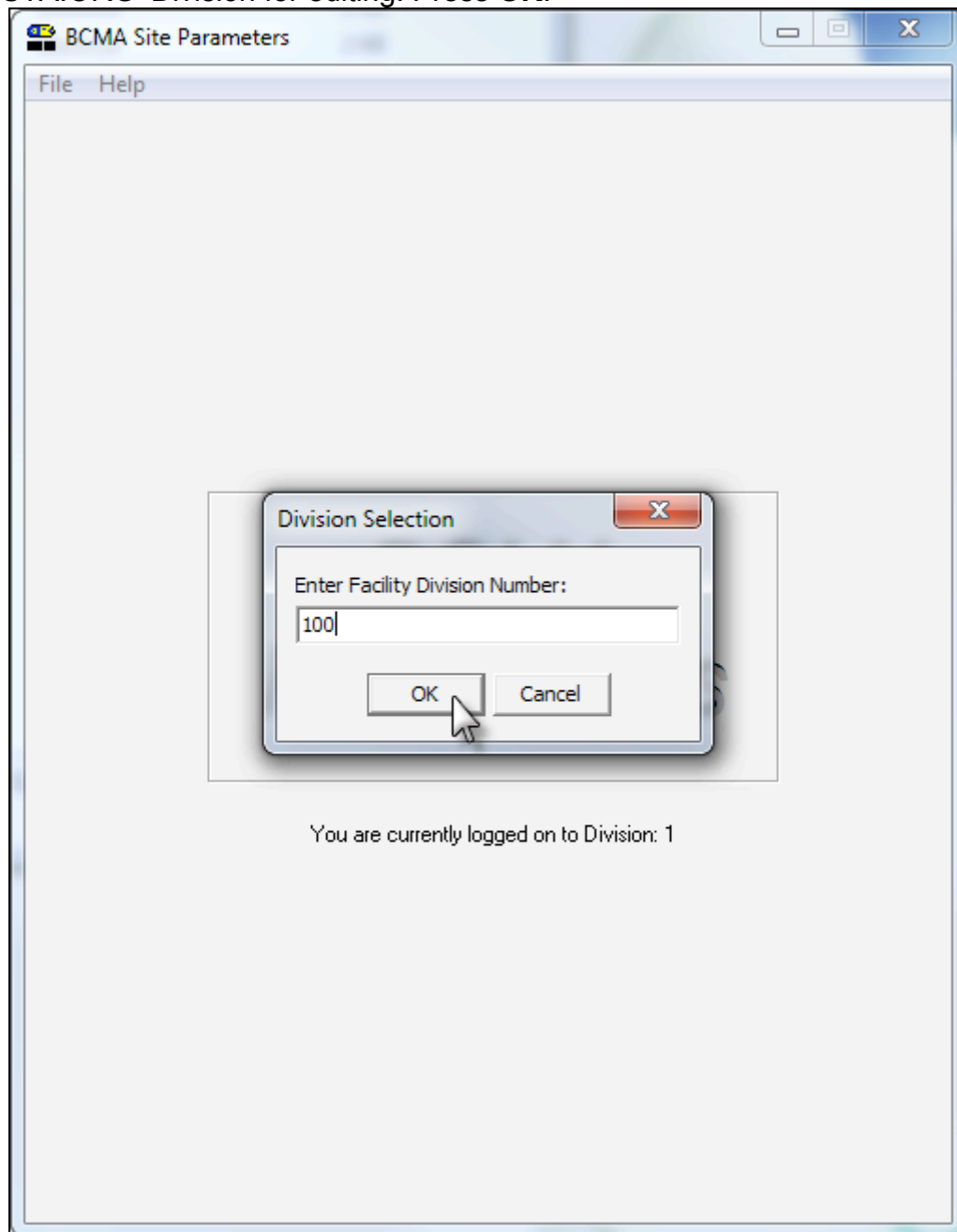
2. Press **OK** at the warning that pops up.



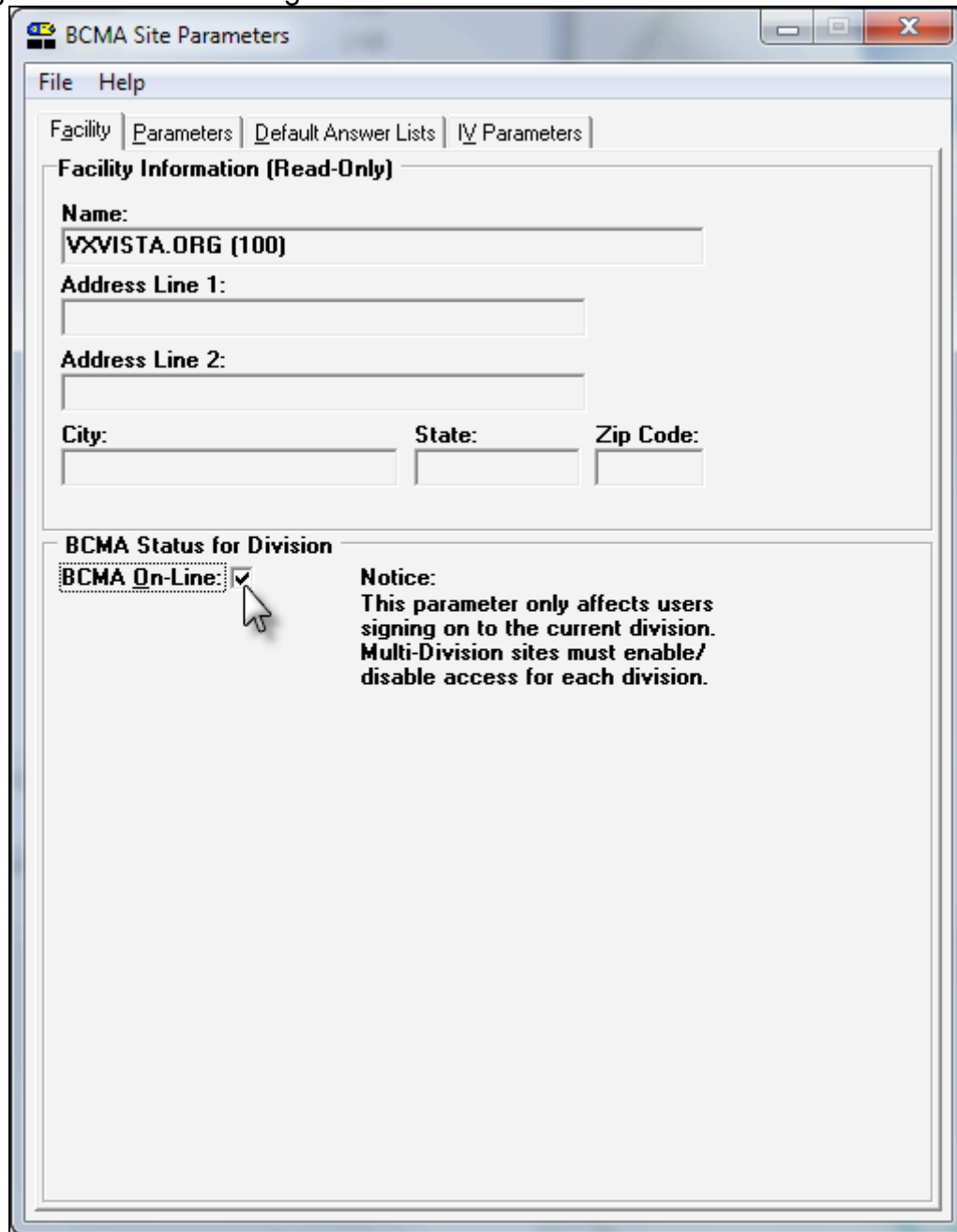
3. On the 'BCMA Site Parameters' window, click **File** and then **Open...** to choose a Division.



4. Enter '100' in the 'Enter Facility Division Number:' textbox. This will open the 'VXVISTA.ORG' Division for editing. Press **OK**.



- Click the 'BCMA On-line:' check box to insert a check mark as shown. This will configure vxBCMA to run against the VXVISTA.ORG Division.



The screenshot shows a window titled "BCMA Site Parameters" with a menu bar containing "File" and "Help". Below the menu bar are four tabs: "Facility", "Parameters", "Default Answer Lists", and "IV Parameters". The "Facility" tab is selected, and the section "Facility Information (Read-Only)" is displayed. This section contains several text input fields: "Name:" (containing "VXVISTA.ORG (100)"), "Address Line 1:", "Address Line 2:", "City:", "State:", and "Zip Code:". Below these fields is a section titled "BCMA Status for Division" which contains a checkbox labeled "BCMA On-Line:" that is checked. A mouse cursor is pointing at the checkmark. To the right of the checkbox is a "Notice:" section with the text: "This parameter only affects users signing on to the current division. Multi-Division sites must enable/disable access for each division."

- Click **File** and then **Exit**. vxBCMA is now configured for use.

Appendix A

User Configuration - Menu Options & Keys

**** Refer to steps provided in the ‘Adding Secondary Menu Options and Security Keys’ section**

vx CPRS

- Secondary Menu Options
 - VFDVX CPRS GUI CHART
- Security Keys
 - None

vx BCMA

- Secondary Menu Options
 - PSB GUI CONTEXT
 - OR BCMA ORDER COM
- Security Keys
 - PSB MANAGER (Only for Users designated to access vxBCMAPar App)

vx GroupNotes

- Secondary Menu Options
 - OR GN SET LOCATIONS
- Security Keys
 - OR GN ACCESS

vx PatientPicture


- Secondary Menu Options
 - VFDVXP PATIENT PIC CONTEXT
- Security Keys
 - VFDVXP PATIENT PIC ADMIN (Administrative Users Only)

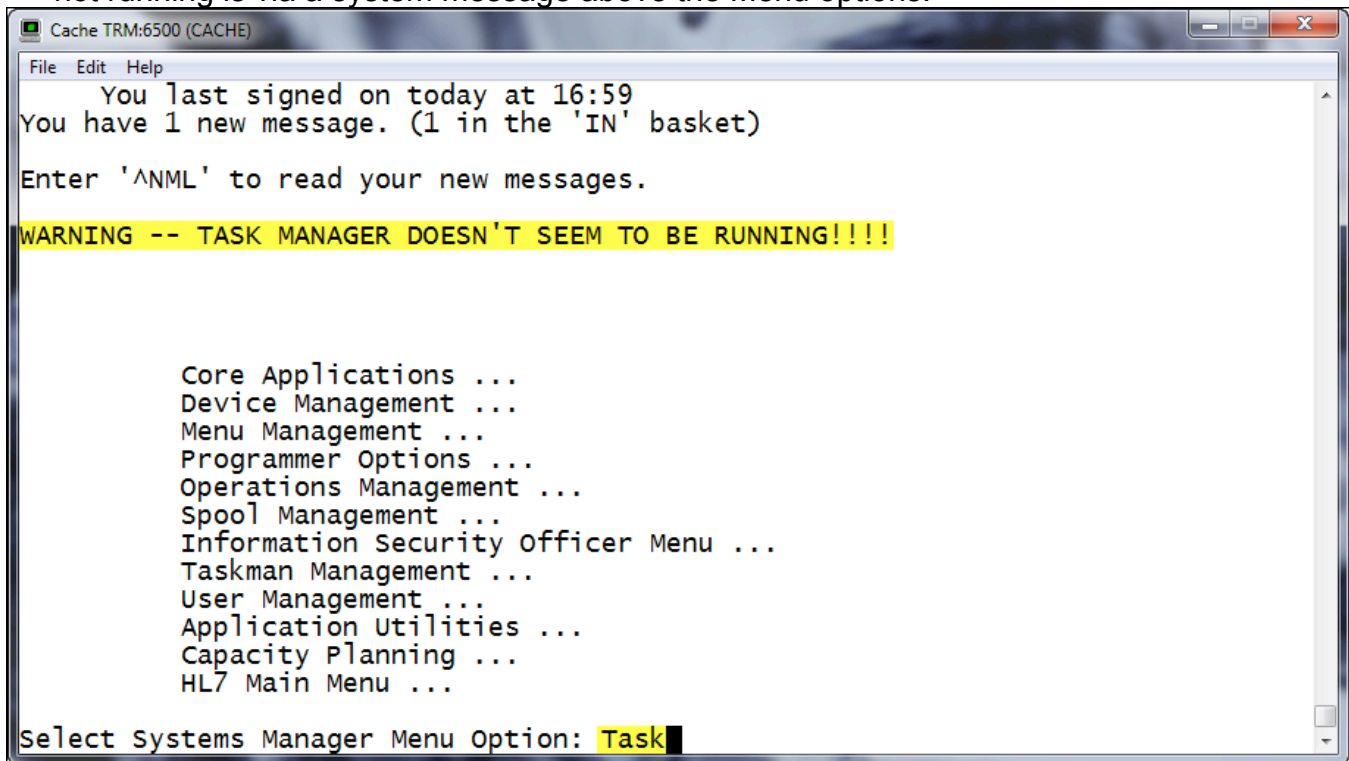
vx Vitals

- Secondary Menu Options
 - VFDVX GMV V/M GUI
- Security Keys
 - GMV MANAGER (Only for Users designated to access vxVitalsManager App)

Appendix B

Alternate Method of Starting Taskman and the Listener

1. Right click on the blue Cache cube  and select 'Terminal'.
2. At the 'ACCESS CODE:' prompt type 'ADMIN1'. Press [Enter].
3. At the 'VERIFY CODE:' prompt type '123Admin!!'. Press [Enter].
4. The 'Systems Manager Menu' is displayed. A quick check to determine if the Taskman is not running is via a system message above the Menu options.



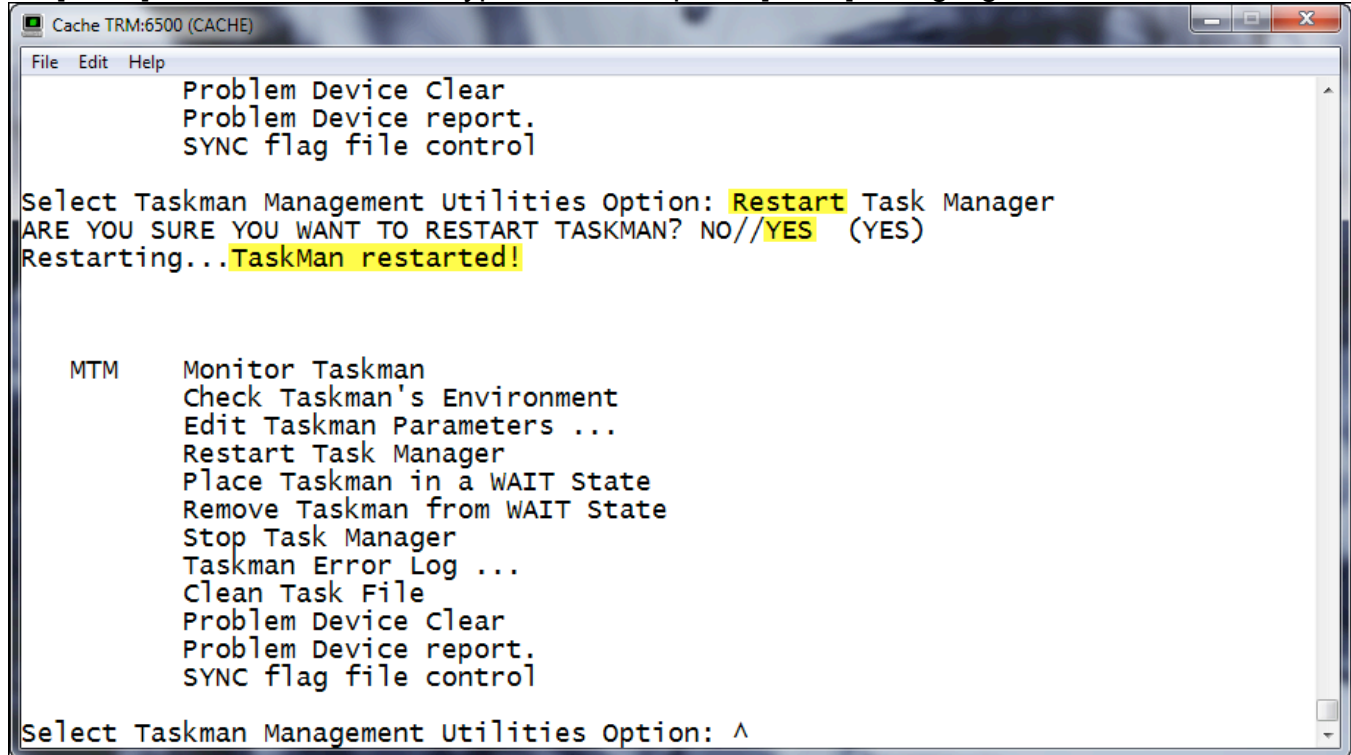
```
Cache TRM:6500 (CACHE)
File Edit Help
You last signed on today at 16:59
You have 1 new message. (1 in the 'IN' basket)
Enter '^ANML' to read your new messages.
WARNING -- TASK MANAGER DOESN'T SEEM TO BE RUNNING!!!!

Core Applications ...
Device Management ...
Menu Management ...
Programmer Options ...
Operations Management ...
Spool Management ...
Information Security Officer Menu ...
Taskman Management ...
User Management ...
Application Utilities ...
Capacity Planning ...
HL7 Main Menu ...

Select Systems Manager Menu Option: Task
```

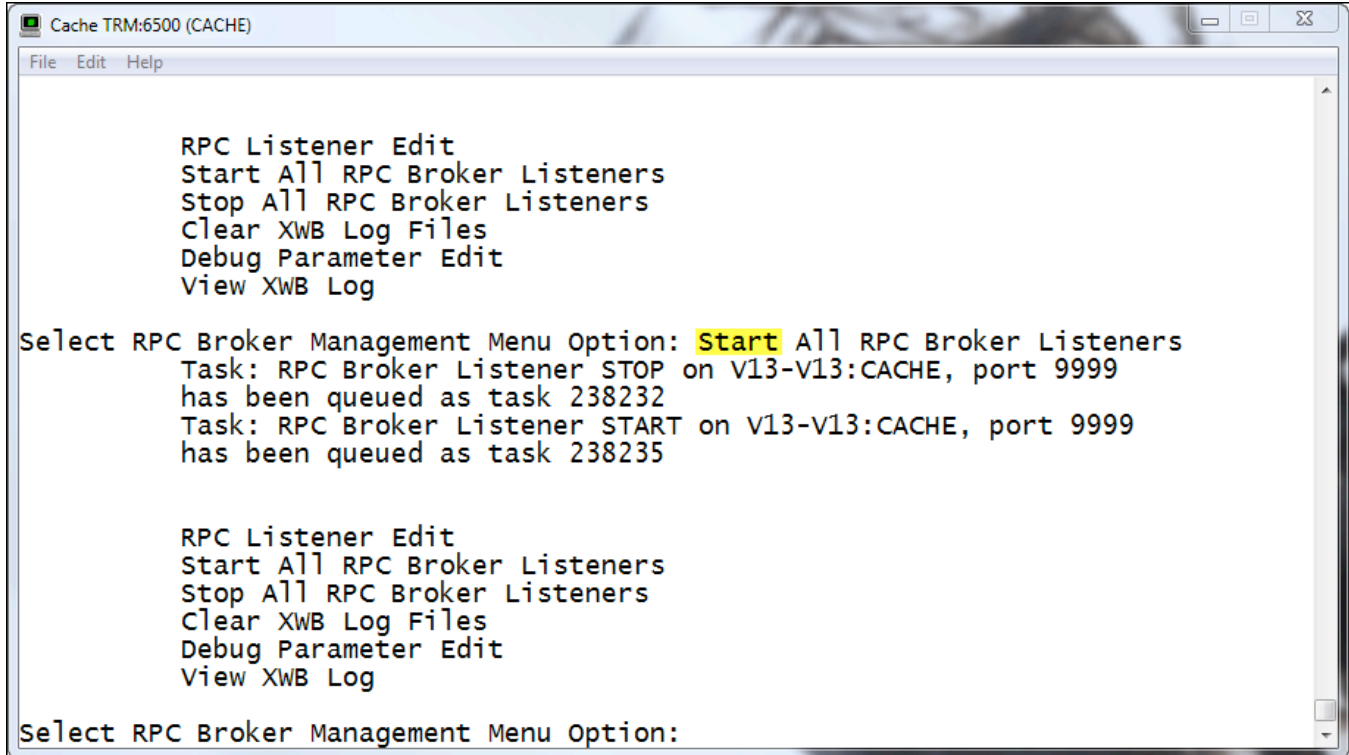
5. Type 'Task' at the 'Select Systems Manager Menu Option:' prompt and press [Enter] to enter 'Taskman Management'.
6. Type 'Task' at the 'Select Taskman Management Option:' prompt and press [Enter] to enter 'Taskman Management Utilities'.

7. Type 'Restart' at the 'Select Taskman Management Utilities Option:' prompt and press [Enter] to restart Taskman. Type 'YES' and press [Enter] as highlighted below.



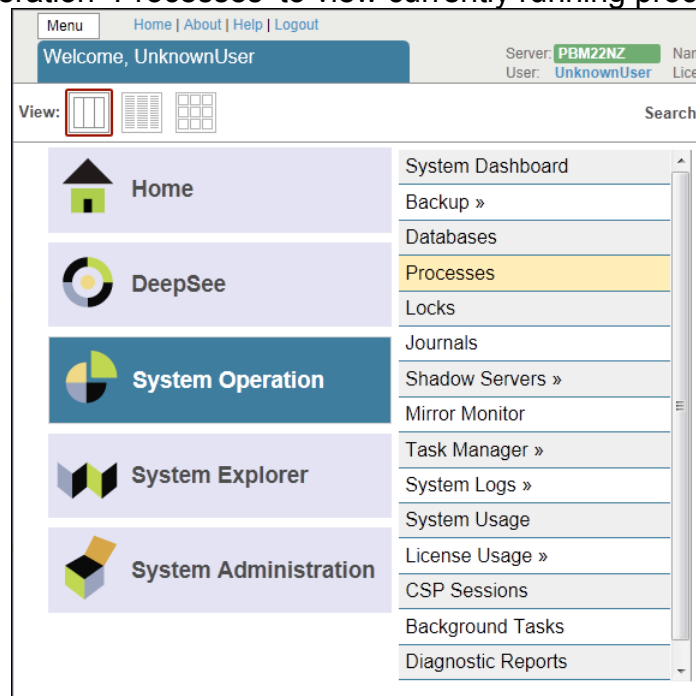
8. Type an '^' at the 'Select Taskman Management Utilities Option:' prompt and press [Enter] to return to the previous menu.
9. Type an '^' at the 'Select Taskman Management Option:' prompt and press [Enter] to return to the main menu.
10. Type 'Oper' at the 'Select Systems Manager Menu Option:' prompt and press [Enter] to enter 'Operations Management'.
11. Type 'RPC' at the 'Select Operations Management Option:' prompt and press [Enter] to enter 'RPC Broker Management Menu'.

12. Type 'Start' at the 'RPC Broker Management Menu Option:' prompt and press [Enter] to start All RPC Broker Listeners.



13. Right click on the blue Cache cube  and select 'Management Portal'.

14. Select 'System Operation>Processes' to view currently running processes.



15. To verify Taskman and the Listener have started, look next to your Namespace for '%ZTM' for Taskman and '%ZISTCPS', along with the port, for the Listener. Taskman and the Listener may take up to 90 seconds to upload, so use the 'Refresh' button to reload processes periodically.

Menu
Home | About | Help | Logout
System > Processes

Server: **PBM22NZ**
Namespace: %SYS
User: **UnknownUser**
Licensed to: **Document Storage Systems, Inc.**
Instance: **CACHE**

Caché
by InterSystems

Broadcast
Refresh: ☒ off ☐ on 10 sec

Processes

The following is a list of active processes:

Filter:
Page size: 0
Max rows: 1000
Results: 24
Page: 1 of 1

Process ID	User	Device	Namespace	Routine	Commands	Globals	State	Client Name	Client EXE	Client IP	O/S Username	
4144				CONTROL	0	0	RUNW				SYSTEM	-
4772				WRTDMN	197	1047	RUNW				SYSTEM	-
4780				GARCOL	0	0	RUNW				SYSTEM	-
4788				JRNDMN	1599	0	RUNW				SYSTEM	-
4796				EXPDMN	0	0	RUNW				SYSTEM	-
8544	UnknownUser	[TCP]1972 8544	%SYS	%SYS.cspServer2	311865	30028	READ		CSPap.dll		CSP Gateway	Details
2012		//./nul	%SYS	MONITOR	11985	69	EVTW				SYSTEM	-
4412		//./nul	%SYS	RECEIVE	5355	289	HANGW				SYSTEM	Details
2072		//./nul	%SYS	ECPWork	0	0	RUNW				SYSTEM	Details
5004		//./nul	%SYS	CLNDMN	255	21	RUNW				SYSTEM	-
1492		[TCP]1972	%SYS	%SYS.SERVER	255	49	READ				SYSTEM	-
8600	UnknownUser	localhost:1972	%SYS	%SYS.ProcessQuery.1	540906	34817	RUN	localhost	CSPap.dll	::1	CSP Gateway	-
4696		//./nul	%SYS	LMFMON	5865	69	HANGW				SYSTEM	-
6500	UnknownUser	[TRM]: 6500	V13	XQ	29835	2535	READ	TRM:		127.0.0.1	bhatten	Details
8620	UnknownUser	localhost:1972	%SYS	%SYS.cspServer2	14280	443	READ	localhost	CSPap.dll	::1	CSP Gateway	Details
4444		//./nul	%SYS	%CSP.Daemon.1	6885	804	HANGW				SYSTEM	-
3148		//./nul	%SYS	%SYS.Monitor.Control.1	609705	16308	EVTW				SYSTEM	-
1172	TASKMGR	//./nul	%SYS	%SYS.TaskSuper.1	18870	1540	EVTW				SYSTEM	Details
4400	UnknownUser	//./nul	V13	%ZTMS1	241740	24894	HANGW				bhatten	Details
8232	UnknownUser	//./nul	V13	%ZTM	1020	101	LOCK				bhatten	Details
6228	UnknownUser	//./nul	V13	%ZTM	124440	18358	HANGW				bhatten	Details
1112	UnknownUser	//./nul	V13	XMKPLQ	17085	1973	HANGW				bhatten	Details
1436	UnknownUser	//./nul	V13	XMTDT	12240	789	HANGW				bhatten	Details
7248	UnknownUser	[TCP]9999	V13	%ZISTCPS	19125	1635	READ				bhatten	Details

16. Upon verification, close the Terminal and Management Portal.

Appendix C

FAQs


Why is it necessary to create and configure a new user; won't the Administrative user allow me to do everything I need?

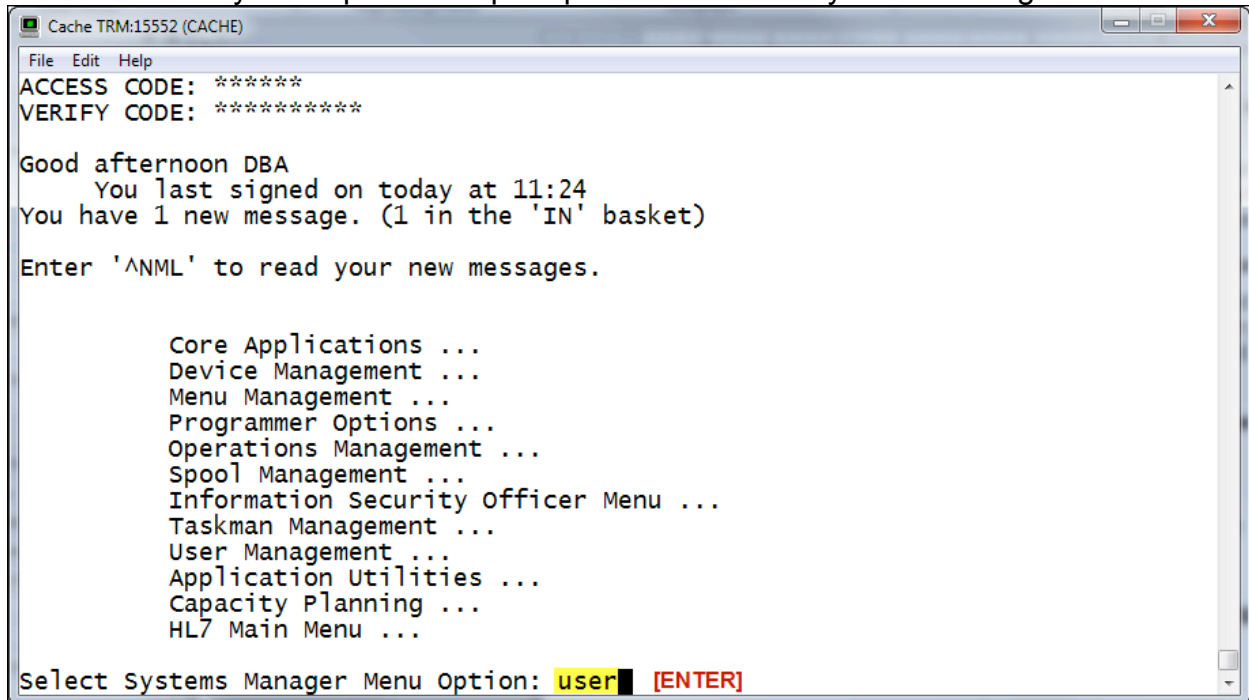
Adding 'Standard' users is necessary to test the full functionality of the software suite. The 'Administrative' account provided also contains privileges that can be detrimental to normal software performance if utilized by unqualified personnel.

Why do I need to add Menu Options and Security Keys to users?

The Secondary Menu Options and Security Keys listed in this manual are required for their associated applications to run. The 'Standard' user provided at the beginning of the installation guide has been setup with all required Menu Options and Keys for convenience.

How do I know which Secondary Menu Options and Security Keys a particular user carries?

1. Right click on the blue Cache cube  and select 'Terminal'. Use the 'Administrative' Access/Verify Code pair when prompted to enter the Systems Manager Menu.



```
Cache TRM:15552 (CACHE)
File Edit Help
ACCESS CODE: *****
VERIFY CODE: *****

Good afternoon DBA
  You last signed on today at 11:24
You have 1 new message. (1 in the 'IN' basket)

Enter '^NML' to read your new messages.

Core Applications ...
Device Management ...
Menu Management ...
Programmer Options ...
Operations Management ...
Spool Management ...
Information Security Officer Menu ...
Taskman Management ...
User Management ...
Application Utilities ...
Capacity Planning ...
HL7 Main Menu ...

Select Systems Manager Menu Option: user [ENTER]
```


2. Type 'user' at the 'Systems Manager Menu Option:' prompt and press [ENTER].
Type 'user' again at the 'User Management Option:' prompt and press [ENTER].

```
Cache TRM:15552 (CACHE)
File Edit Help
Select NEW PERSON NAME:

    Add a New User to the System
    Grant Access by Profile
    Edit an Existing User
    Deactivate a User
    Reactivate a User
    List users
    User Inquiry
    Switch Identities
    File Access Security ...
    Clear Electronic signature code
    Electronic Signature Block Edit
    Manage User File ...
    OAA Trainee Registration Menu ...
    Person Class Edit
    Reprint Access agreement letter

Select User Management Option: user Inquiry [ENTER]
Select NEW PERSON NAME: zztest,newuser ZZTEST,NEWUSER [ENTER] NZ
DEVICE: ;p-dec;80;9999 Console (Cache' on Windows) [ENTER]
```

3. Type ';p-dec;80;9999' at the 'DEVICE:' prompt and press [ENTER]. This allows the output (Shown Below) to be printed to Terminal in a steady stream that can be scrolled to view the information needed (List of Menu Options and Keys).

```
Cache TRM:15552 (CACHE)
File Edit Help
Last Sign-on ...Dec 27, 2013      Digital Pager .....
Has a E-SIG ....No             Write Med's .....
NPI .....                     Taxonomy .....
Person Class:

Primary Menu: ORZ MAIN MENU CLINICIAN  Clinician Menu
Secondary Menu(s)
-----
[VFDVX CPRS GUI CHART]          vxCPRSChart version 1.28.24.x
[PSB GUI CONTEXT - USER]       BCMA Client Context
[OR BCMA ORDER COM]            OR BCMA ORDER COM VERSION 1.0
[OR GN SET LOCATIONS]          Group Notes Locations version 1.0.12.0
[VFDVXP PATIENT PIC CONTEXT]   VFDVXP PATIENT PIC CONTEXT
[VFDVX GMV V/M GUI]            Vitals/Measurements GUI Application

Keys Held
-----
GMV MANAGER          OR GN ACCESS          ORES          PROVIDER
PSB MANAGER          VFDVXP PATIENT PIC ADMIN

Patient Selection
-----
Restrict?: NO
```

4. Close Terminal.