Installing Vision Appointments with R2 of FlexaTrace

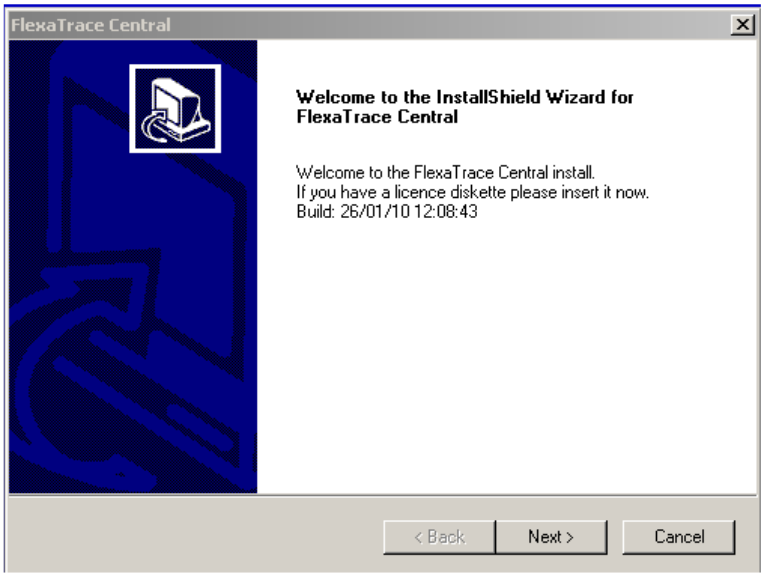
Index

1. Preliminaries

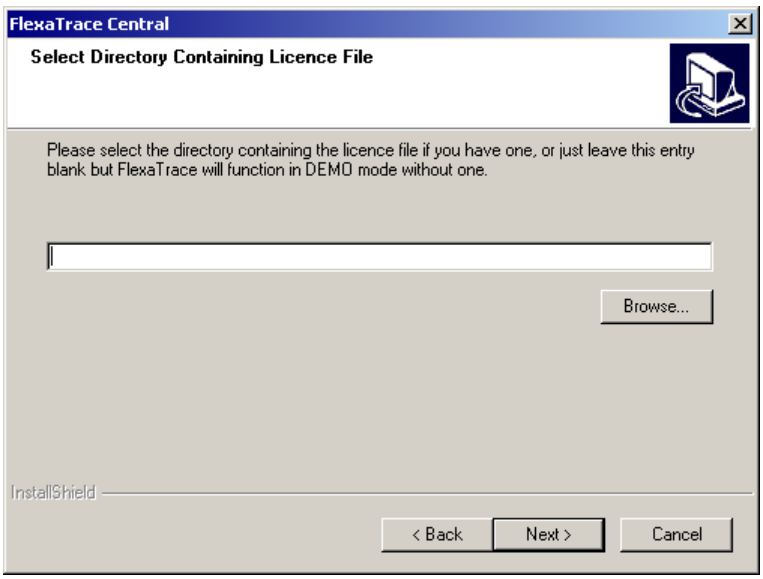
Install the label printer to be used with the Vision Appointment system. If the printer is a Zebra EPL model, and this is to be used with the standard card media (black line mode sensing), download the font: Arial, bold, 12 point, 90Deg as font “a” with the Standard character set. NB - the font does not start to download until you click the OK on the window which claims the font has been downloaded! The download can take approx 30 secs on a serial connection so be sure to wait for it to finish before testing. Some experimentation with font size may be required as printers have been known to respond differently to the same font download.

2. Install FlexaTrace Central

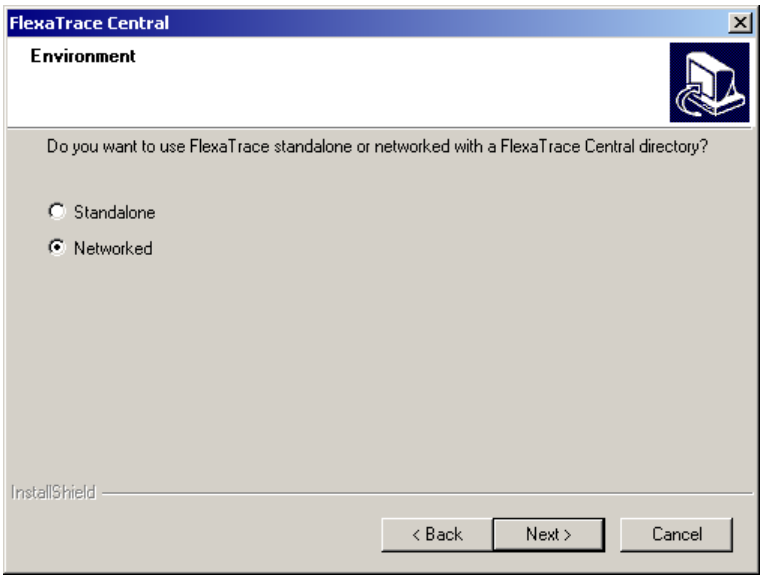
On the server, or first workstation if the server is not accessible, Install FlexaTrace Central by running setup.exe from the install folder.



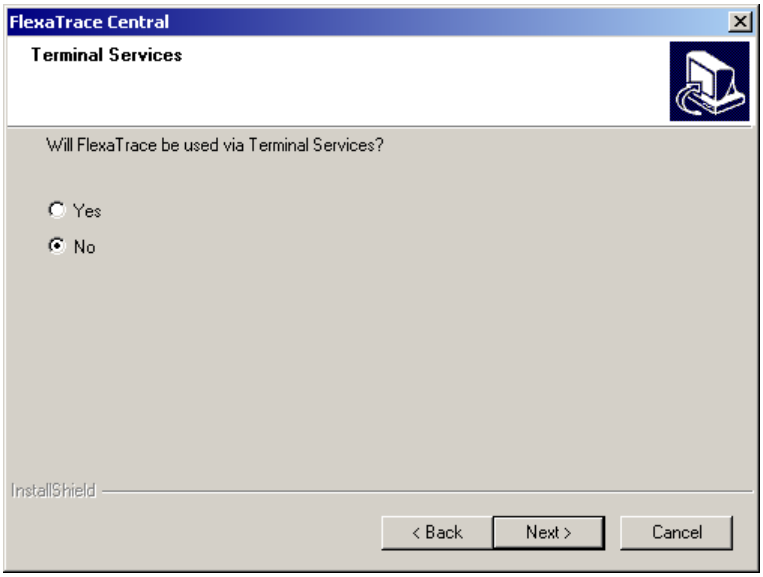
Click Next on the Welcome screen to continue installation.



If a licence has been provided as a file “flexatrace.lic”, specify where it is located. If the licence is in the same folder as the setup.exe program for the FT Central installer it will be automatically detected and reported. If the licence will be applied later because it is in ASCII form or will be copied into the FTDATA folder, leave blank. In either case, click Next to continue installation.

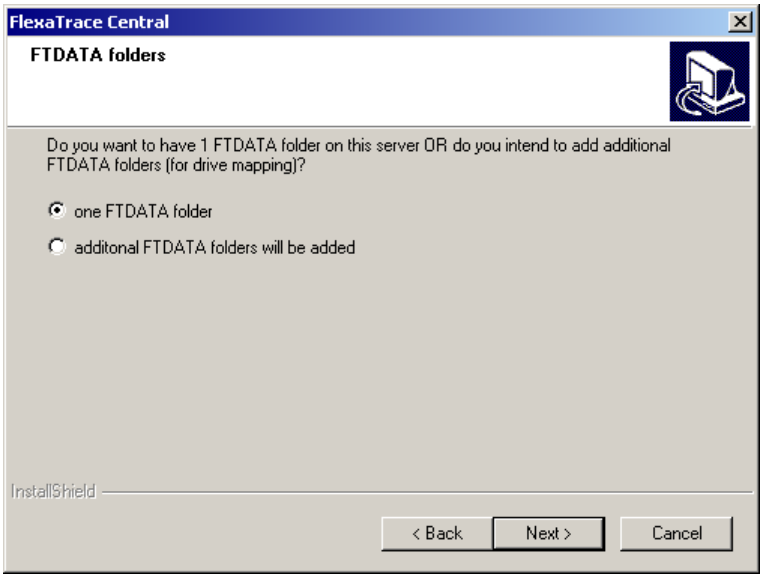


Select “Standalone” if you wish to install FlexaTrace simply on one PC. Select “Networked” if the central components will be shared by multiple PCs.

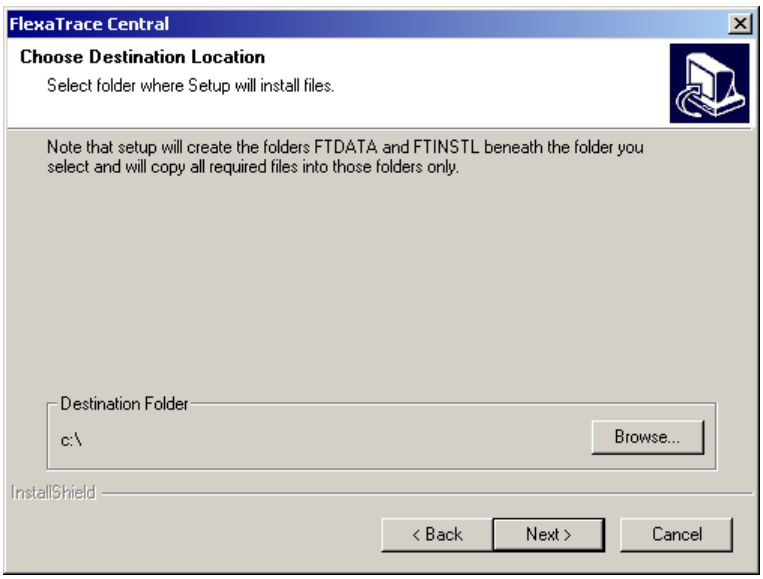


Specify whether FlexaTrace will be used via Terminal Services (or Citrix). If Yes is selected, the INI file specifying local preferences will be stored in the Windows folder of workstations. In the case of a Terminal Server client installation, the INI file will be copied to the Windows folder of each user who logs on to the terminal server and then in turn copied to another INI file called "ftrace.workstationname.ini". Each user on each workstation thus has multiple INI files, one for each workstation which they have logged on to.

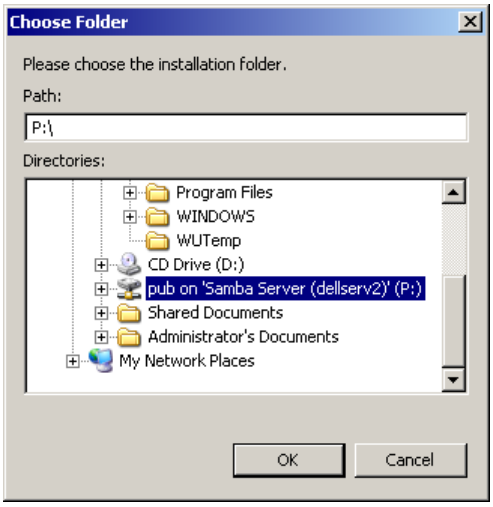
NOTE – Where support for TS workstations is required it is now recommended to NOT select Terminal Services support. Instead, proceed with a local installation and then rely on forwarding the "Vision Appointment" dummy printer into the TS session. See Section 6 for further details.



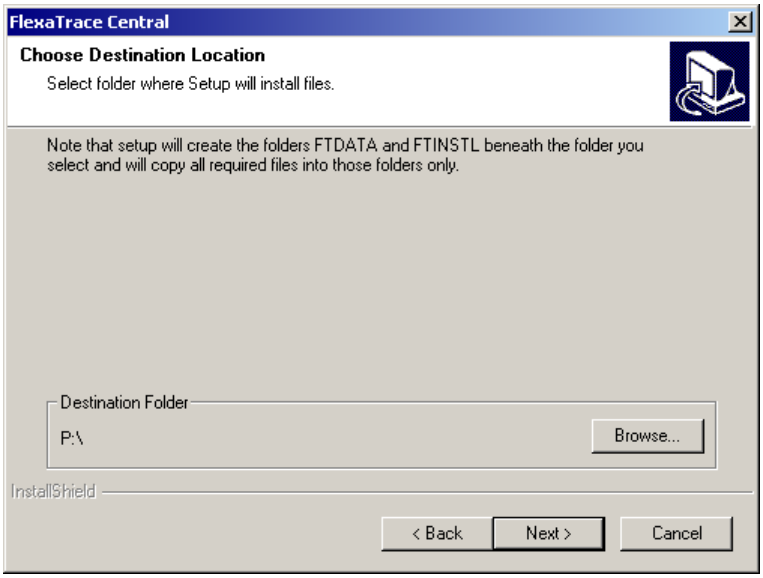
Select "one FTDATA folder" UNLESS the installer is being used to configure support for multiple practices on a server.



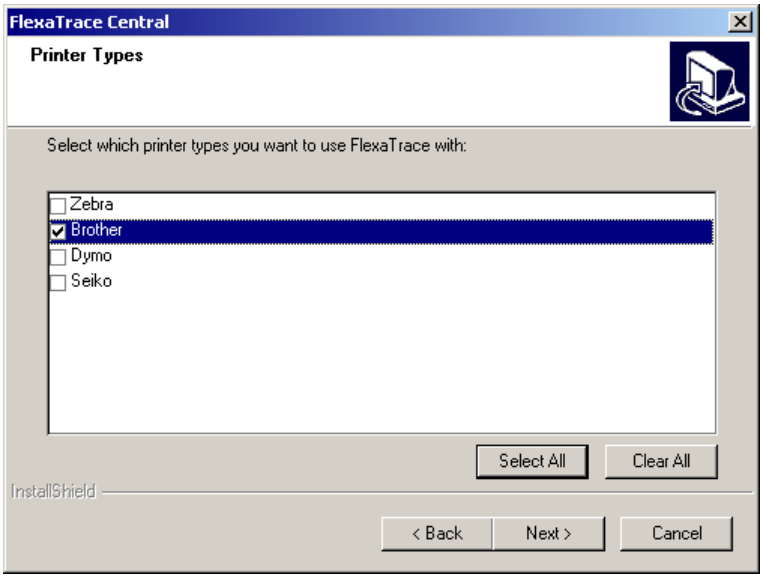
Specify the drive name or path to the location you wish to install the FTDATA and FTINSTL folders into. To specify an alternative to the default "c:\", click on the "Browse" button.



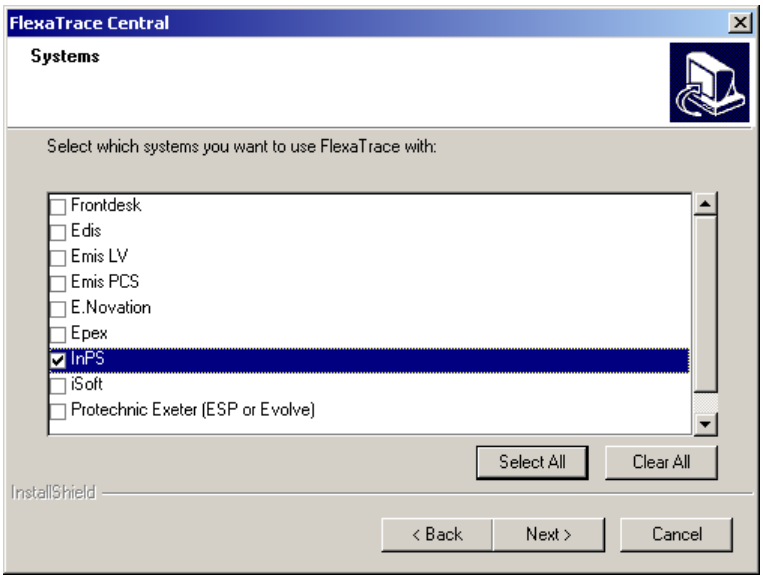
Browse to, or type in, the required path and click OK. NB, if the folders are to be stored within a pre-existing shared folder on a server or workstation, ensure that all users have rights to read and write to the FTDATA folder and files within it.



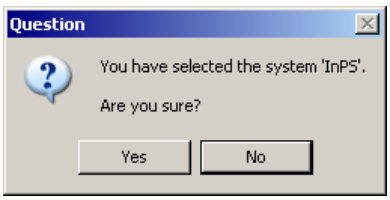
The required path is now displayed. If this is correct, click Next to continue.



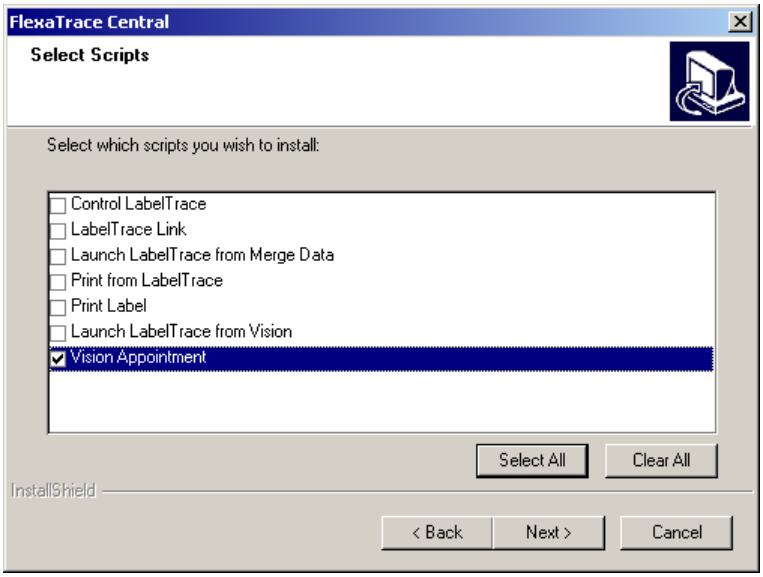
Now specify whether additional printer support is to be installed. Note that for Zebra EPL or ZPL (or other ASCII based printers) no additional support is required. The exception is if MetaPrinter templates are to be used to support e.g. TrueType fonts on the Zebra EPL printers. In this case tick the box for "Zebra". If Brother, Dymo or Seiko SLP printers are to be used it is essential to tick the relevant box. This will cause the relevant printer support to be installed when the client is being installed. Click Next to continue.



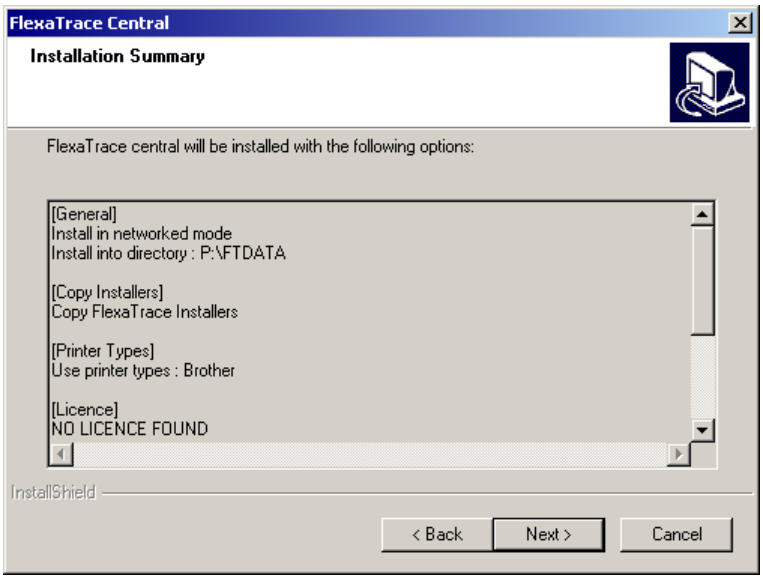
Now select InPS as the clinical system for which FlexaTrace scripts are to be installed. Click Next to continue.



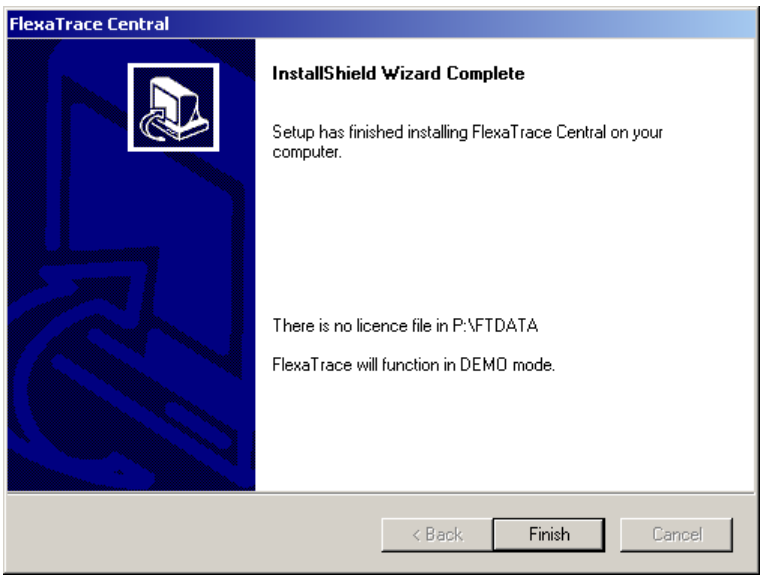
Click Yes to confirm your selection or No to go back and change it.



Select the "Vision Appointment" option to be installed and click Next to continue.



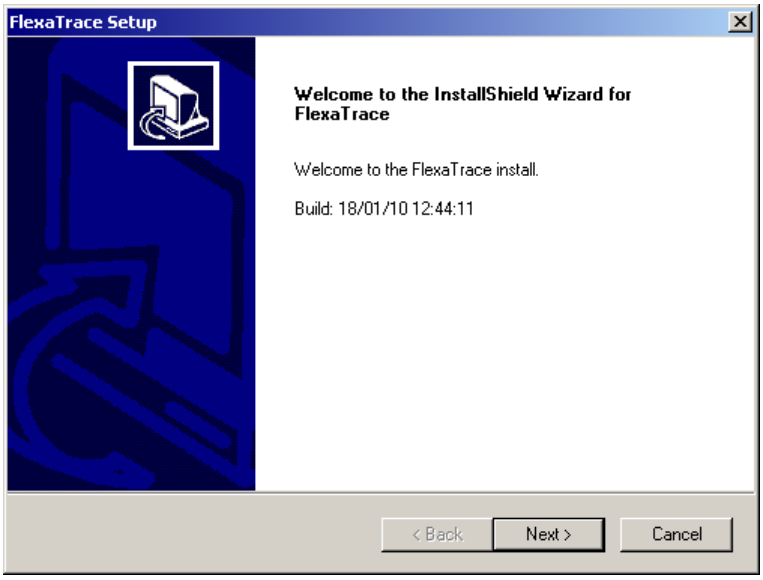
A summary of installation options selected is presented for review. Click on Next to continue. The installation will now proceed.



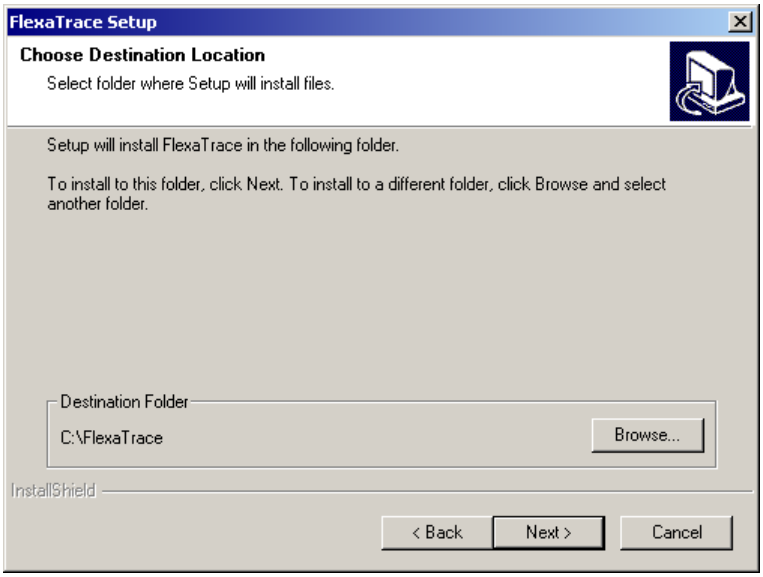
After completion, the final screen will confirm if the licence is correctly installed or is yet to be applied. Click Finish to exit the installation.

3. Installing the FlexaTrace Client

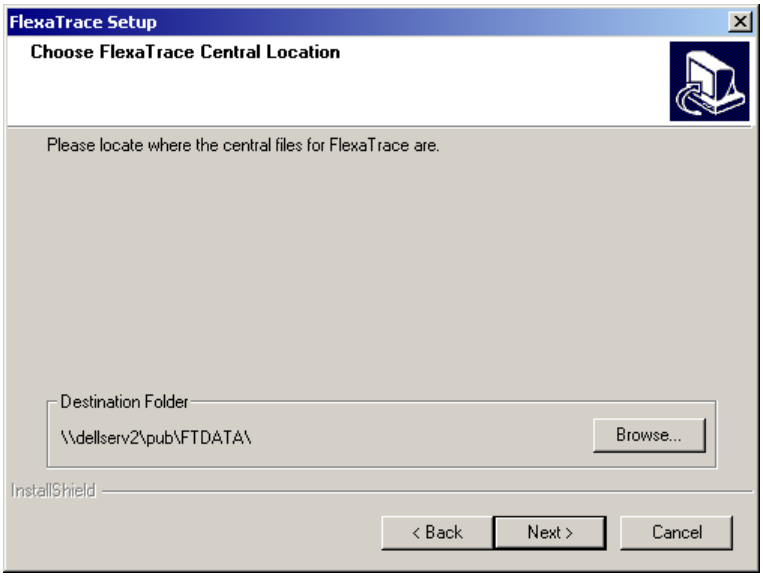
On the relevant workstation(s) install the FlexaTrace client by running setup.exe from the folder
\\servername\Ftinstl\ft_client_installer\Vxx
(where Vxx folder name indicates the version of the installer)



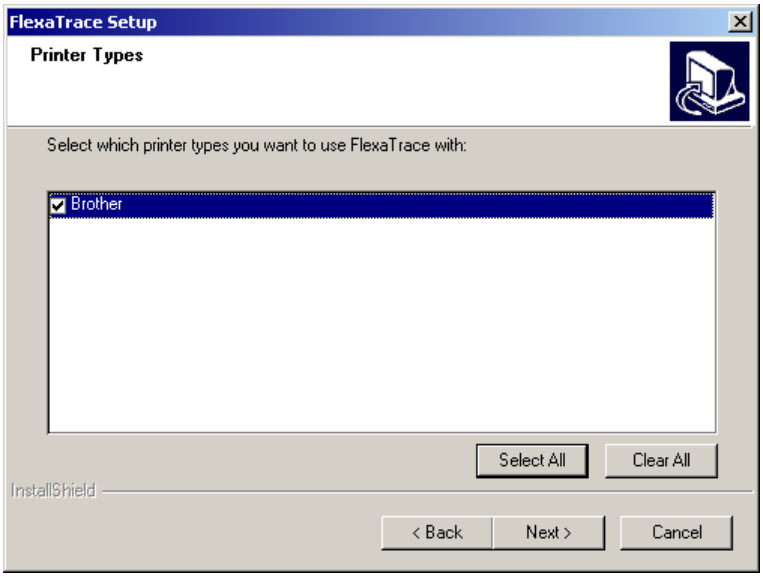
click on Next on the welcome screen to continue.



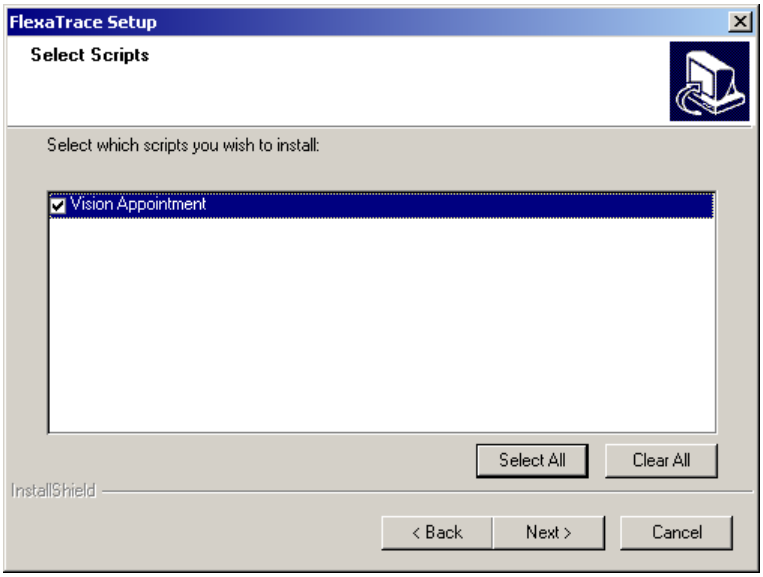
The default location for the FlexaTrace client program files is “C:\FlexaTrace”. Click OK to accept that or use the Browse button to specify an alternative location.



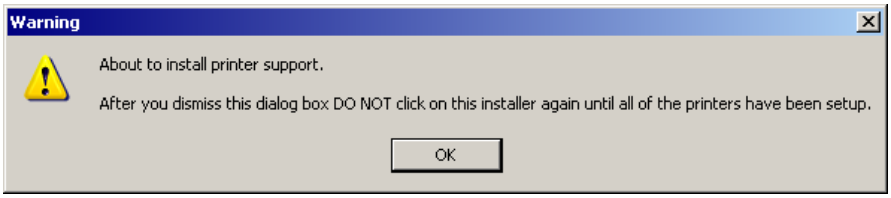
The default location for the central FTDATA folder is now shown. Normally this will be correct and so click on Next to continue. ONLY CHOOSE AN ALTERNATIVE IF YOU ARE SURE YOU KNOW THAT THIS IS APPROPRIATE.



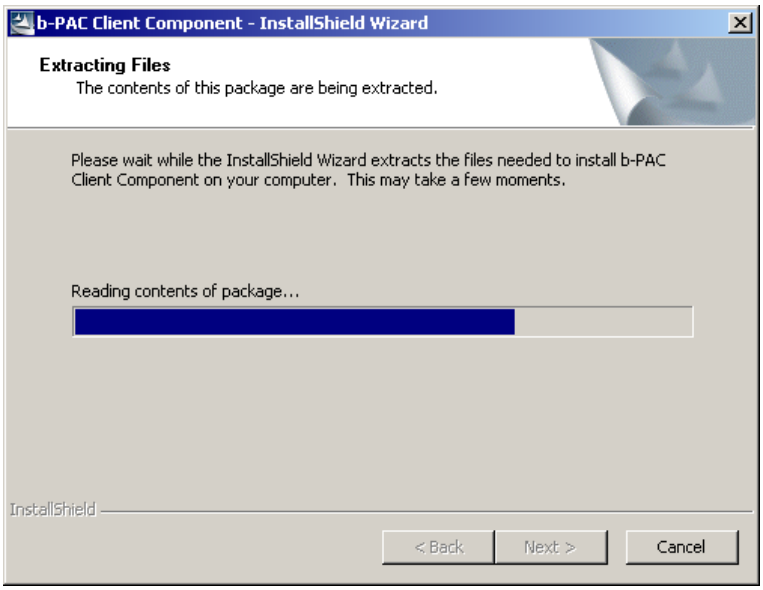
Now select the printers for which support is to be installed. Note that the list of available types consists only of those selected during the FlexaTrace Central installation. Click Next to continue.



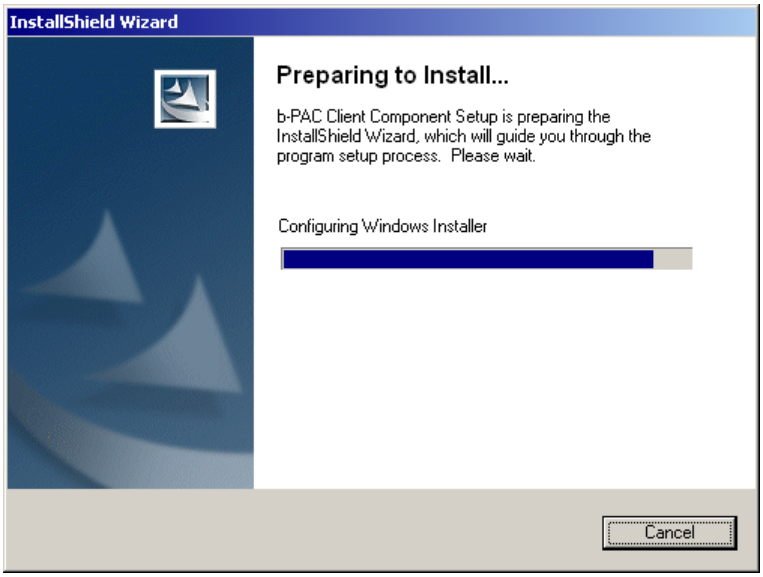
Select which scripts to install for this client installation. Note that the list of available scripts consists only of those selected during the FlexaTrace Central installation. Click Next to continue.



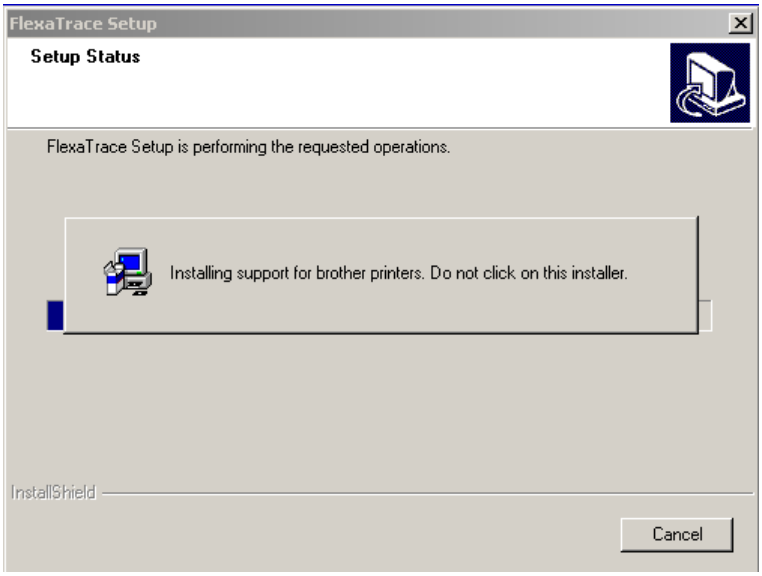
If any printer support has been selected then the above prompt will be displayed prior to installing printer support and at several points during the printer support installation process. Be sure to avoid clicking on the main FT installer until the printer support installer(s) have finished running. Click OK to start the printer support installer(s) running. The example below shows the “b-PAC” installer for running – this supports Brother printers.



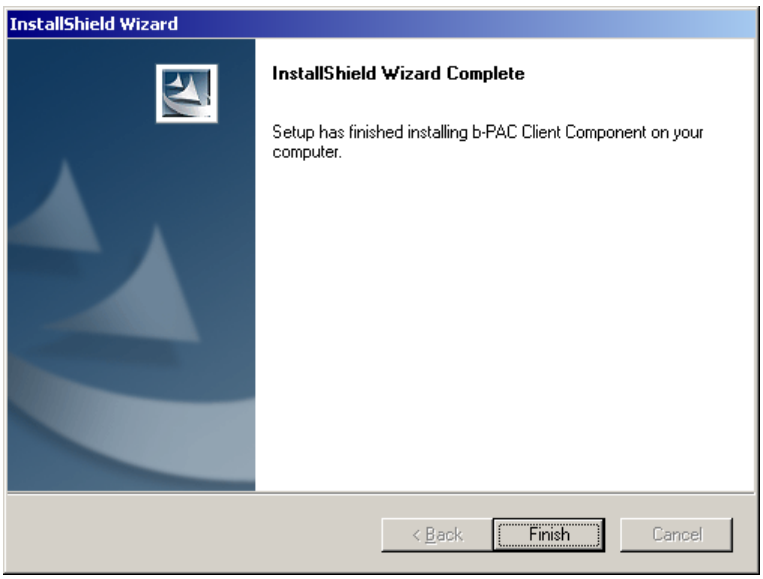
The support installers will start to run.



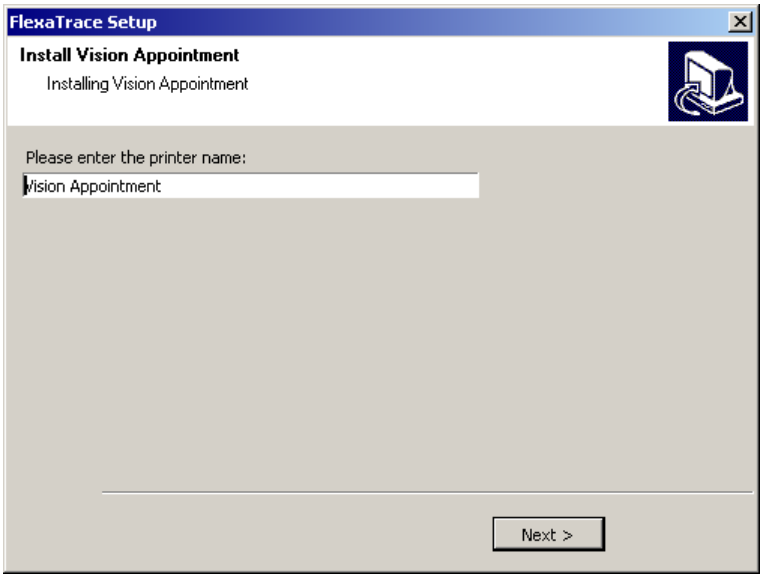
The installers present a number of screens, some of which may need to be acknowledged.



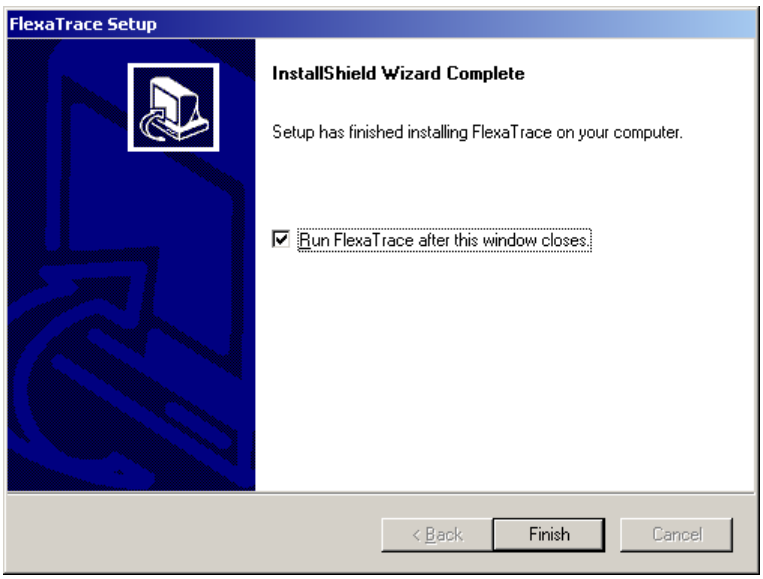
Note any message to avoid clicking on the main FlexaTrace installer.



when each printer support installer has finished running click “Finish” etc as appropriate. The main FlexaTrace installer will then continue.



The installer will now create the “Vision Appointment” dummy printer. Click next to continue with this name or edit the name as required. DO NOT edit the name unless you are sure that this is appropriate. Click Next to continue. Several FlexaTrace message boxes will confirm progress.

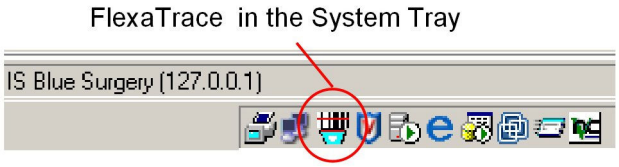


The final installation screen has a tick box to cause FlexaTrace to run on completion of the installation. Tick this box as appropriate and then click Finish to complete the client installation.

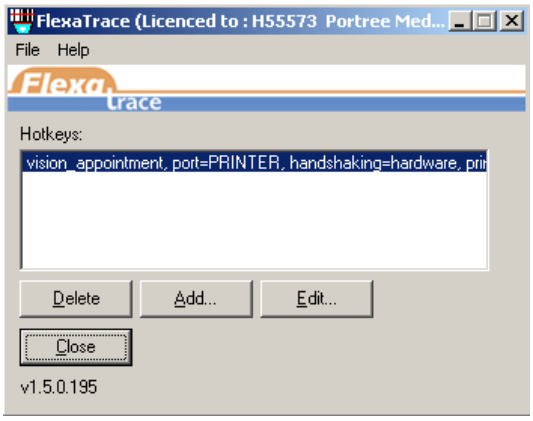
When the FlexaTrace client starts up, either immediately on completion of the installation or by using the menu option Start > All Programs > QuickTrace > FlexaTrace > Start, the message box above is displayed as a reminder of the configuration requirement in the Vision Systems own Appointments Module. You may choose to tick the box for "Don't show this message again" to suppress it on subsequent start ups.

4. Configure FlexaTrace Client

It is now necessary to configure the FlexaTrace system. If not running, select the program option “Start > All Programs > QuickTrace > FlexaTrace > Start”. Open the FlexaTrace Client which runs in the system tray by right clicking on the icon and selecting “Open”.



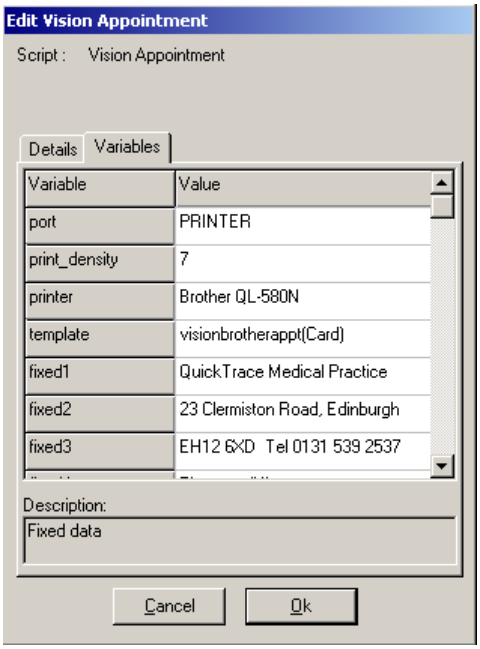
Alternatively select the program option “Start > All Programs > QuickTrace > FlexaTrace > Configure”.



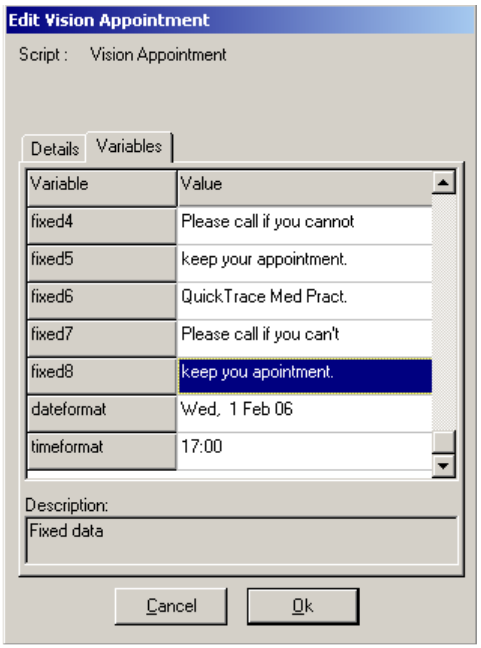
If a licence has been supplied in ASCII form, on the first workstation, paste it into the Help/About/Update licence” window. NB you must restart FlexaTrace for the licence to be recognised.

Click on the “vision_appointment” entry as shown above and then click Edit. (or simply double click the entry).

Set the required data for system parameters via the “Variables” tab. To change data for parameters, click on the current value. The current value will either change to a drop down list from which the required value may be selected or will permit keying in of required data. Click OK to save the settings. Note that variables are hidden if not relevant.



Port: select the port for the real, physical label printer. (NOT the “Vision Appointment” dummy printer.
Handshaking: choose hardware or software (only available if selected port as COMn)
Print_density: set print density (only relevant for Zebra printers)
Printer: if port set as “printer” specify the real, physical label printer. (NOT the “Vision Appointment” dummy printer).
Path: if port set as “file” specify the folder in which to save the output files.
IP: if port set as IP enter the IP address and IP port as e.g. “192.168.1.30:9100”
Template: select the required template. Note that those with “brother” in the name are specific to Brother QL printers, similarly Seiko and Dymo. Those with no manufacturer name are for Zebra EPL printers. See below for listing of available templates.
Fixed1: first line of header on cards
Fixed2: second line of header on cards
Fixed3: third line of header on cards



Fixed4: first line of footer on cards
Fixed5: second line of footer on cards
Fixed6: first line of header on labels
Fixed7: first line of footer on cards
Fixed8: second line of footer on cards
Dateformat: how date will be presented by default (can be overridden by template modifier)
Timeformat: how time will be presented by default (can be overridden by template modifier)

Note that the designation of “fixed” lines refers to the standard designs provided. The “fixed” fields can be used for any purpose in custom designs. Note that the entries may be centred on the card or label by simply prefixing the data with leading spaces.

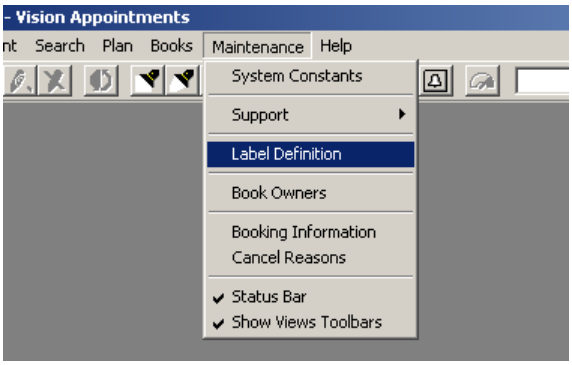
The available templates are:-
vision_appointment – the default, same as vision_appointment1.txt
vision_appointment1 –EPL, simple label without patient name
vision_appointment5 – EPL, simple label with patient name
vision_appointment(card)1 - EPL, card with patient name, and 1 or 2 appointments and 2 message lines.
vision_appointment(card) - EPL, card with patient name, and 1, 2 or 3 appointments and no message lines.
visionbrotherappt2(Card) – Brother with patient name and 1 or 2 appointments and no message lines
visionbrotherappt(Card) – Brother with patient name and 1 appointments and 2 message lines
VisionDymoappt1 – Dymo (99012) with patient name, 1 appointment and 1 message line
VisionDymoappt – for Dymo (99012) with patient name, 1 appointment and 2 message lines

Meta EPL label.txt – Metaprinter label with one header line, patient name and 2 message lines,

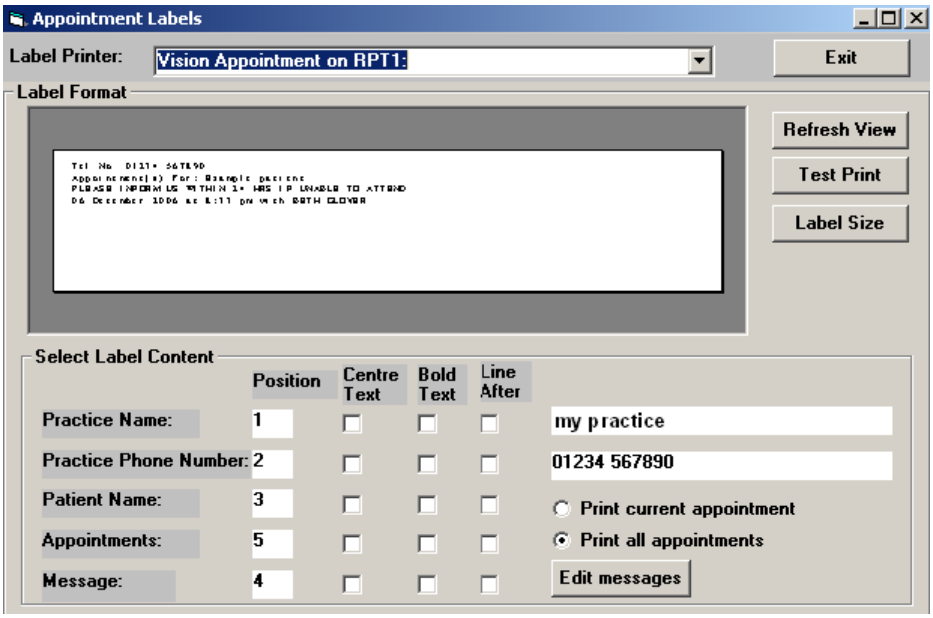
All the following are cards with three header lines, patient name plus …
Meta EPL (card) – 1 appt , 2 message lines
Meta EPL (card) - as above with logo
Meta EPL (card) 3 appt inc message - up to 3 appts, 2 message lines
Meta EPL (card) with logo 3 appt inc message - as above with logo
Meta EPL (card) 3 appt inc site and message- up to 3 appts with premises name, 2 message lines
Meta EPL (card) with logo 3 appt inc site and message – as above with logo
Meta EPL (card) 4 appt- up to 4 appts
Meta EPL (card) with logo 4 appt - as above with logo
Meta EPL (card) 4 appt inc site- up to 4 appts with premises name
Meta EPL (card) with logo 4 appt inc site - as above with logo
Meta EPL (card) 6 appt- up to 6 appts
Meta EPL (card) with logo 6 appt - as above with logo

5. Configure the Vision Appointments Module

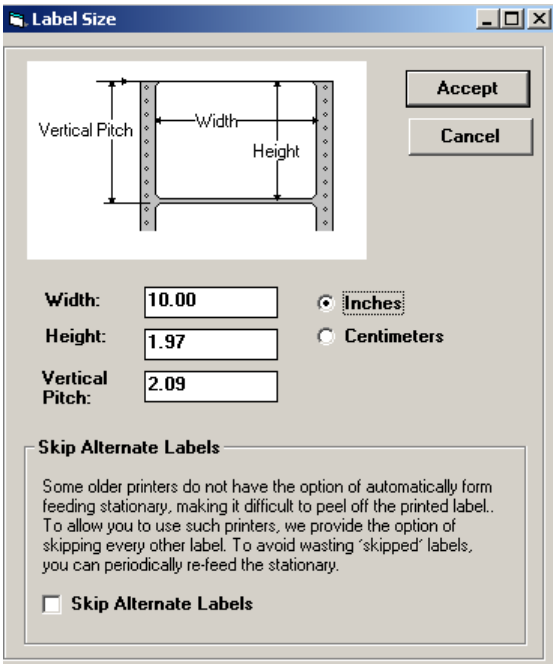
In the Vision Appointment module - configure via the “Maintenance > Label Definition” menu option as shown in the following screenshots



Select the “Vision Appointment” printer from the drop down list of installed printers.
Set the order of the Label Content fields as 1,2,3,5,4.
Ensure all format tick boxes are unticked.
Enter data for Practice Name and Practice Phone Number (any data – these fields are not actually used but having data in them ensures correct assignment of the required data).
Choose “current” or “all” appointments using the radio buttons.



Click on the “Label Size” button and set the label size as per the following screenshot.



Click the Accept button on the Label Size window and confirm that the example label representation is as shown above. It is essential that the individual lines shown do not “wrap”. Then use the Test Print button on the Label Definition window to print a dummy appointment card. (it always prints 2 copies from this test button).

6. Installing if Workstations Operate via Terminal Services, including VES Sites.

The following approach is used when installing the Vision Appointments system for VES sites. It is also recommended for sites where there is a local server but some or all workstations are supported over Terminal Services.

Install FlexaTrace as if for a normal thick client installation, as per this guide.

On those workstations where Vision is run via Terminal Services, download the following patch

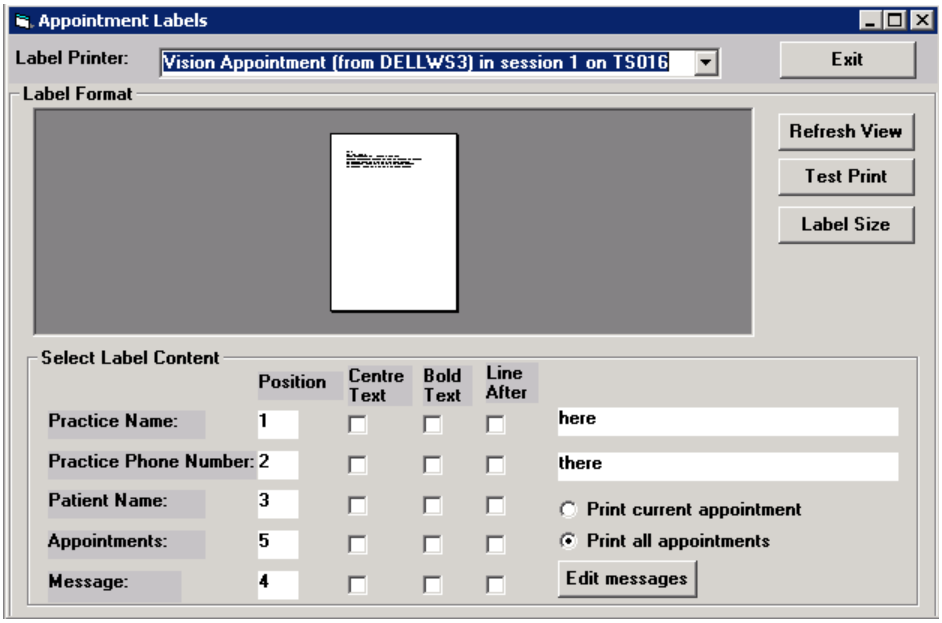
“Registry patch to force redirecting printers to be forwarded into a Terminal Services session”.

This is on the Support page of the QuickTrace web site www.quicktrace.co.uk RIGHT CLICK on the link and save the file to the desktop, changing if necessary, the file extension to ".reg" Windows MAY try to save it as a ".mp3" file (mysteriously). Finally, double click the file on your desktop to add it to the Registry. Note that it must be run once by each relevant user on each relevant workstation.

This will ensure that the locally installed Vision Appointment dummy printer will be visible as a forwarded printer in the Terminal Services session.

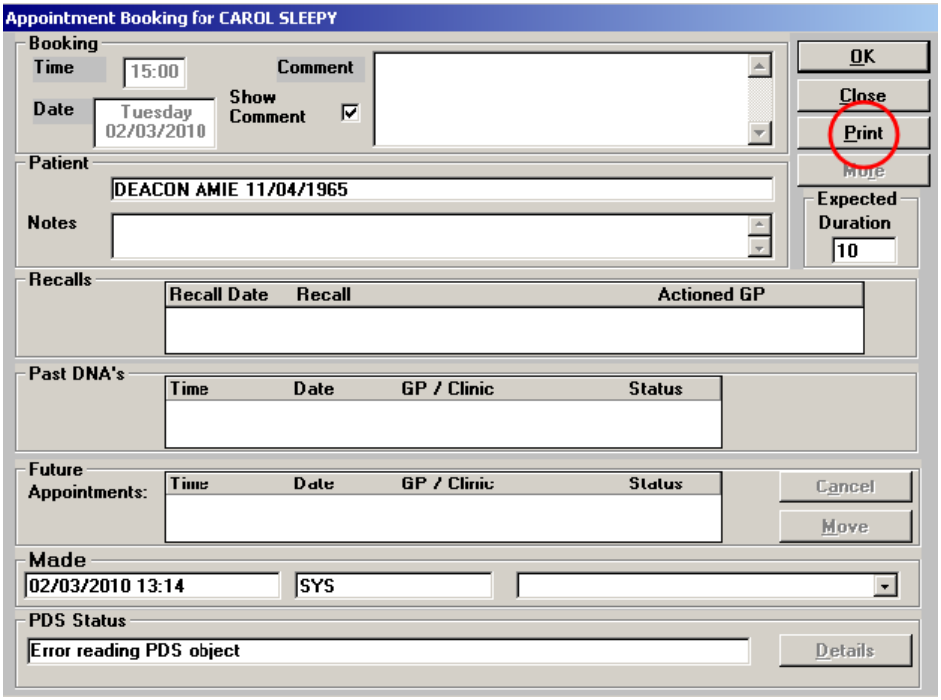
Now log into Vision in a Terminal Services session and follow the instructions for configuring the Vision Appointments module. Select as printer…
“Vision Appointment (from workstationname) in session N on terminalservername”.

See example in the screenshot below.



Note that the label outline shown differs from that seen in normal “thick client” installations, even with the same parameters for Label Size specified. The reason for this is not known but it works anyway.

7. To Print an Appointment Card



To print an appointment card, after completing the details, click “Print” on the Appointment Booking window, instead of “OK” or “Close”.

8. Excluding Slots based on Clinician Name to Avoid e.g. Messages being Printed

Some practices create appointment sessions which are not for real appointments but are to be used for alerting GPs to issues, other messages etc concerning a specific patient. The corresponding slots will appear to be real appointments so far as the appointment card add-on is concerned and so would be printed. This is normally not appropriate so these may be suppressed if the Clinican Name for the appointment session is in an exclusion file. Each line in this file will be compared against the clinician name for a given appointment and if it matches then the appointment will be ignored.

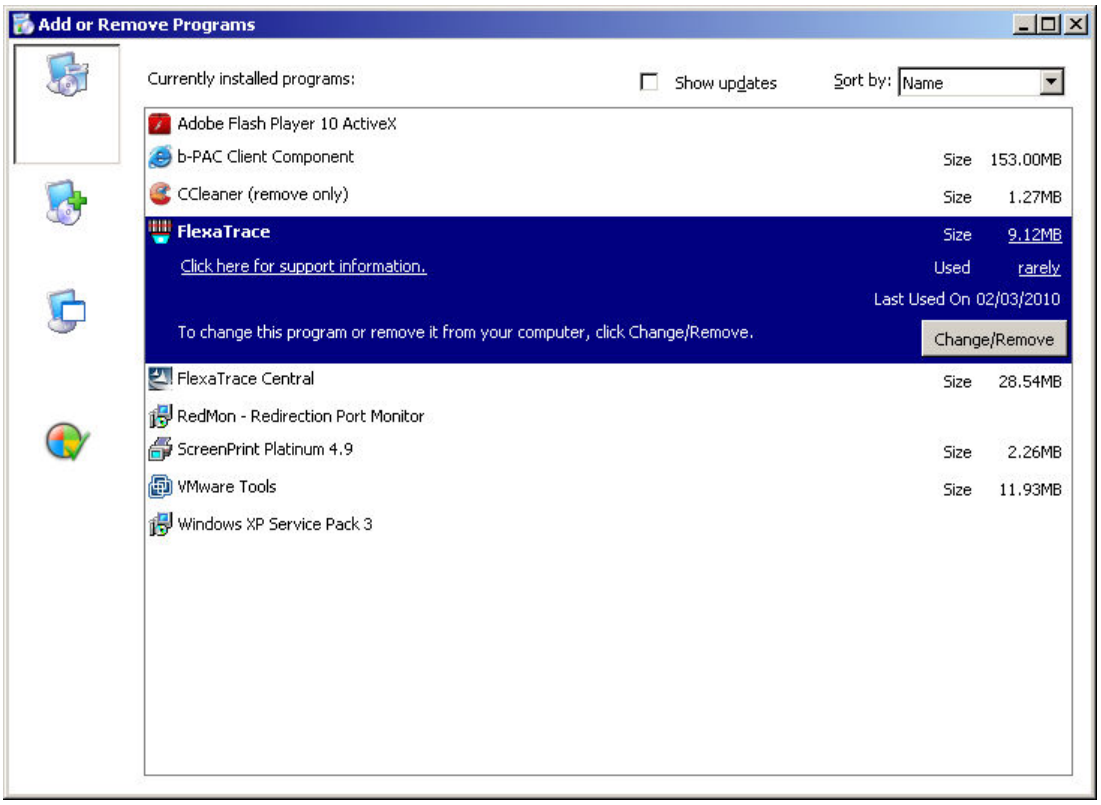
The file is …

\FTDATA\scripts\data\vision_appointment\exclude_doctors.txt

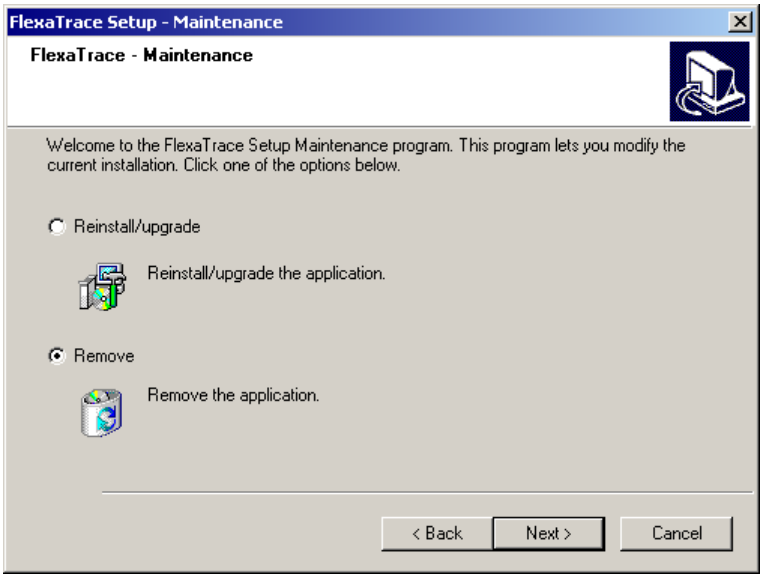
It is created during the installation of FlexaTrace but is initially empty apart from some comments to aid in adding entries. The entries to be added to cause suppression must be as the clinician Name line of the session but are case-insensitive. Blank lines and lines which start with a # character are ignored. Spaces are trimmed from the start and end of each line.

9. De-installing the FlexaTrace Client

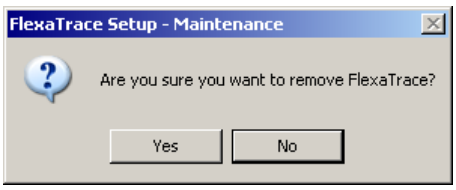
Click on the Start > Control Panel > Add or Remove Programs option.



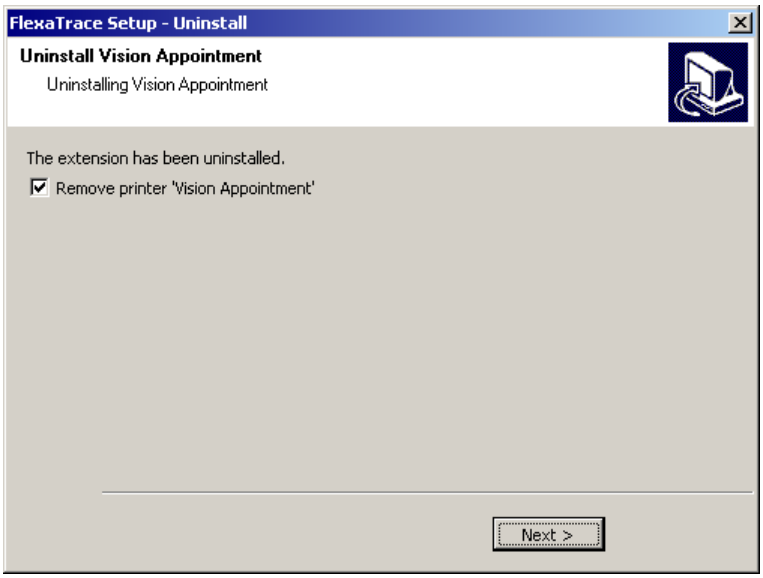
Click on the FlexaTrace entry then click the “Change/Remove” button. The FlexaTrace Client setup program will run in Maintenance mode.



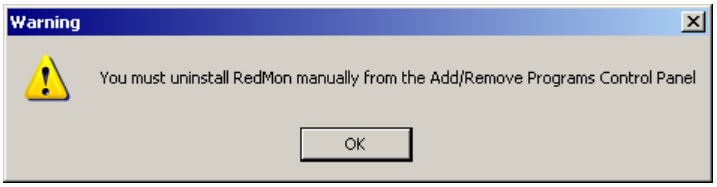
Click on the “Remove” radio button then click Next.



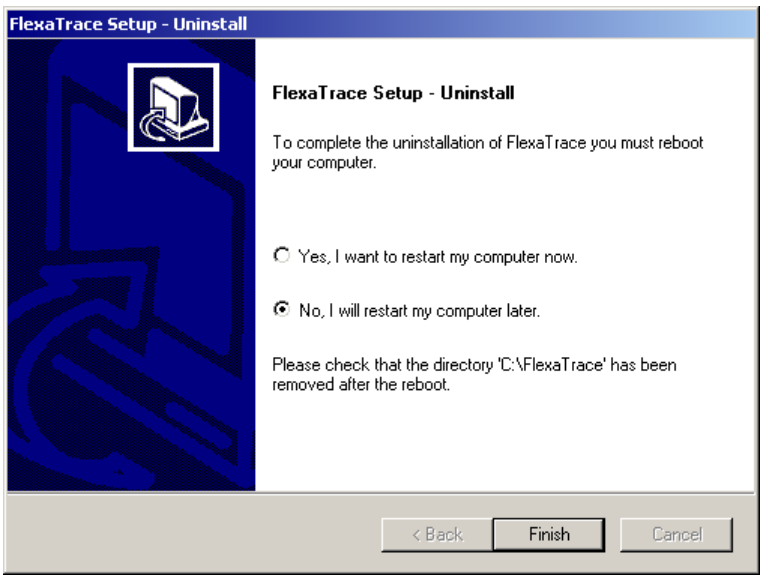
Click on Yes to confirm that you wish to remove FlexaTrace.



FlexaTrace will be removed. The screen above shows a tick box which allows the "Vision Appointment" dummy printer to be removed as a final stage. If this is ticked, the printer will be removed and several brief FlexaTrace messages will confirm the progress of its removal.



Finally a warning is provided that RedMon (the software whch redirects data sent to the dummy printer to FlexaTrace) must be uninstalled manually. See Appendix 2 for details of how to do this.

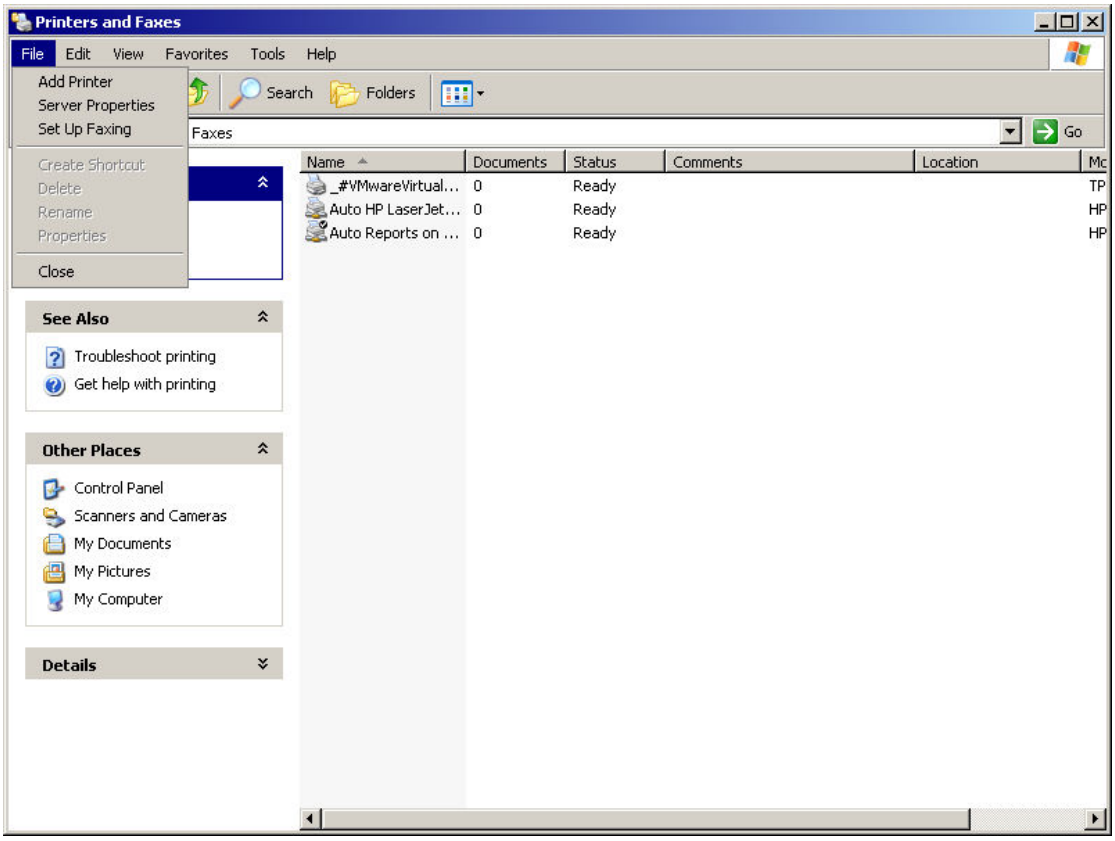


After the FlexaTrace client has been de-installed, the PC needs to be restarted to remove some files which are locked by Windows. Select the appropriate restart option and click Finish. The files will be removed when the PC restarts.

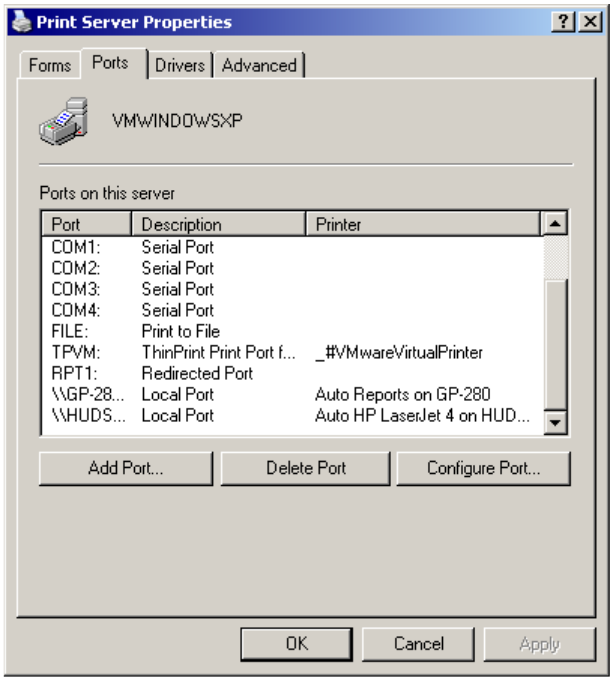
10. De-installing the RPT Redirecting Port

Although the “Vision Appointment” dummy printer can be removed during de-installation of the client, it is necessary to manually remove the RPT port it was associated with manually.

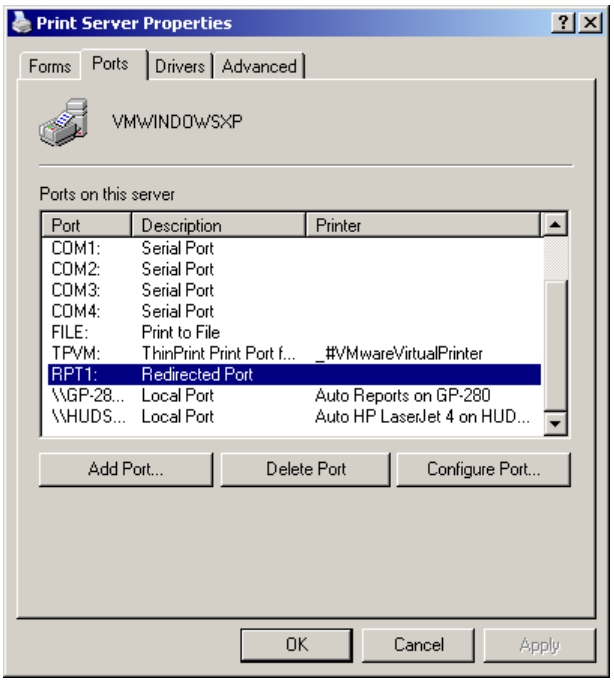
To remove the RPT Port, click the "Start" button, then click the "Printers and Faxes" button on the Start menu. (This may actually require Start > Settings > Printers and Faxes.)



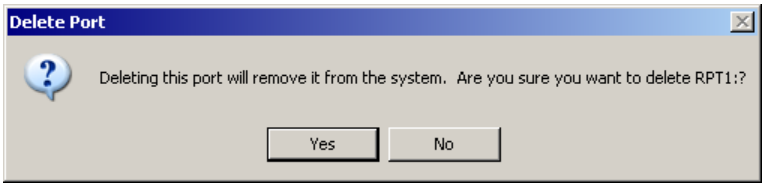
This will open the Printers and Faxes window. Click the "File" link in the menu bar of the Printers and Faxes window, then click the "Server Properties" menu item in the File drop-down menu. This will open the Printer Server Properties window.



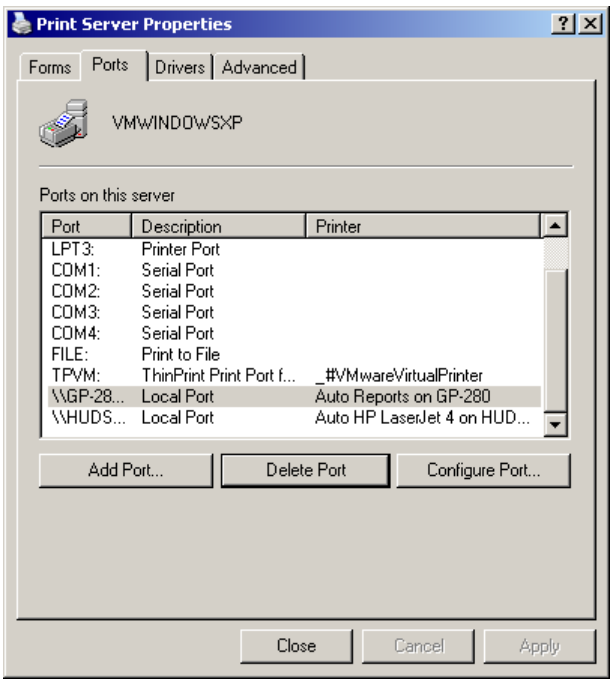
Click the "Ports" tab in the Printer Server Properties window and locate the RPT port that you want to delete. Normally there will be no associated printer.



Click the port that you want to delete, then click the "Delete Port" button. This will open a confirmation window.



Click the "Yes" button in the confirmation window. The port will be deleted.

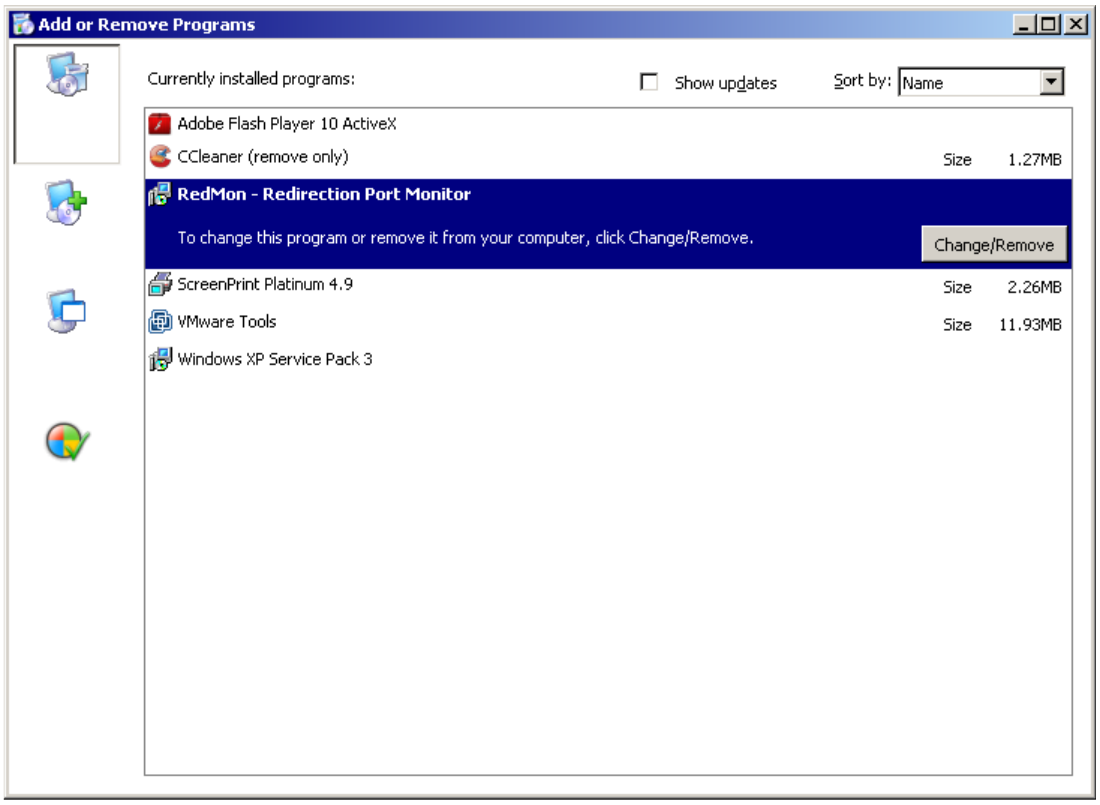


Finally click the "Close" button in the Printer Server Properties window to complete the process.

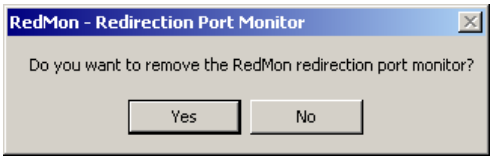
10. De-installing Redmon

It is also necessary to manually remove the Redmon application which generates the RPT ports.

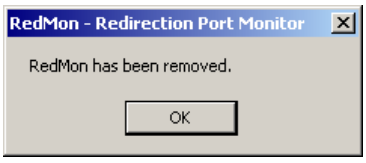
Click on the Start > Settings > Control Panel > Add Remove Programs option.



Select Redmon then click on the “Change/Remove” button.



Click on Yes to confirm that you wish to remove Redmon.



Finally click on OK and then close the Add/Remove Programs window.