FORTÉ SOFTWARE SERIES Technical Publication - Chiro8000

Implementation Guide

TECHNICAL PUBLICATION

Implementation Guide

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Introduction

A little about the company and the software you purchased.

hank you for your purchase of our 8000 software. Forté Holdings is a national billing and practice management software company dedicated to supporting the technology needs of chiropractors around the United States. Our products are designed by veteran healthcare programmers using the standards set by Microsoft® Corporation. They are also guided by our doctors that advise our development efforts. We understand that even the best technology needs the direct input and counsel of those who actually use the software. We understand that a successful doctor's office needs reliable software at an affordable price. Our core strengths lie in providing total solution software to the healthcare industry. Software that will perform easy, fast, and reliable insurance billing, flexible appointment scheduling, user-friendly office and clinical notes, as well as providing intuitive ways to expand and retain your patient base. We offer all of this in a system that allows for the best clinic flow and allows office staff to enjoy the software they use on a daily basis.

This resource is designed to provide a broad overview of the Forté Holdings software

including but not limited to software installation, how to backup your database, converting from a previous version, and much more. You will also find a full manual located under the help menu from within the software.

TOPICS
Installation
Converting
Backup

Further Questions

If there are further questions with the software do not hesitate to give us a call.

Our technical support team is here to help you with the setup and usage of your new software, provided a technical support agreement is in place. The technical support number is (800)464–1740. They can also be reached by email – support@Forteholdings.com.

Customer Service is another department here to make sure your experience with our software meets your expectations. Should you have any questions you can reach customer service at (800) 456-2622.

Thank you for your purchase of the 8000 software!

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System Requirements

Minimum System Requirements

here are certain minimum system requirements which must be met prior to utilizing the Chiro8000 Billing and Practice Management Software. To verify that you meet those requirements, right click on your Computer Icon (My Computer in Windows XP). A similar System Screen should appear. (the screen shot to the right shows a sample Windows Vista/7 System Screen).



Minimum System Requirements

This section will breakdown the minimum system requirements by two categories, server or workstation. The server (or main computer) will be the system in your office where the physical database file resides. The Server could be in an IT closet, at your front desk, in various offices or even on the doctor's laptop. Your server system must be on and connected to the network in order for any workstation computers to be able to connect.

The workstation systems are satellite computers and feed data from the main server. As mentioned before the main server system must be functional at all times or you may receive undesired results such as the software not running. Workstations do not store any of the data, it is all transmitted to the server. Workstations may be onsite or you may connect remotely utilizing a terminal services session or other form or remote connectivity (e.g. VPN or WAN). For more information on connecting to Chiro8000 from remote sites please contact our technical support department.

The following minimum specifications must be met in order for our team to be able to support your computers as well as for Chiro8000 to run in a successful manner.

Note: All requirements are confirmed as of publication of this manual - August 2011. Any changes whether implied or actual may be obtained by contacting Technical Support or going to <u>www.chiro8000.com</u> and searching System Specs.

Professional, Pioneer, Propel, Ultra, Paramount Editions		
Server	Workstation	
Operating System	Operating System	
 Windows Server 2003 (SP2) Windows Server 2008 Windows XP Home/Professional (SP3) Windows Vista (SP1+) Windows 7 	• Windows XP Home/Professional (SP3) • Windows Vista (SP1+) • Windows 7	
Hardware Requirements	Hardware Requirements	
 Xenon Dual Core or Better OR Core2 Duo @ 2GHz or Better OR AMD Athlon X2 4600 or Better 2.0 GB of RAM 5.0 GB Available Hard Drive Space 100Mbit TCP/IP CD-ROM/DVD-ROM Drive Sound Card USB Port 	 Xenon Dual Core or Better OR Core2 Duo @ 2GHz or Better OR AMD Athlon X2 4600 or Better 2.0 GB of RAM 1.0 GB Available Hard Drive Space 100Mbit TCP/IP CD-ROM/DVD-ROM Drive Sound Card USB Port 	
Other Requirements • 1024x768 resolution monitor @ 32 bit • Internet Explorer 7 • Speakers/Headphones (Recommended) • Word Processor (Recommended)	Other Requirements • 1024x768 resolution monitor @ 32 bit • Internet Explorer 7 • Speakers/Headphones (Recommended) • Word Processor (Recommended)	

Premiere/FortéEMR Edition		
Server	Workstation	
Operating System	Operating System	
 Windows Server 2003 (SP2) Windows Server 2008 Windows XP Home/Professional (SP3) Windows Vista (SP1+) Windows 7 	• Windows XP Home/Professional (SP3) • Windows Vista (SP1+) • Windows 7	
Hardware Requirements	Hardware Requirements	
 Xenon Dual Core or Better OR Core2 Duo @ 2GHz or Better OR AMD Athlon X2 4600 or Better 3.0 GB of RAM (4GB preferred) 10.0 GB Available Hard Drive Space 100Mbit TCP/IP CD-ROM/DVD-ROM Drive Sound Card USB Port 	 Xenon Dual Core or Better OR Core2 Duo @ 2GHz or Better OR AMD Athlon X2 4600 or Better 3.0 GB of RAM (4GB preferred) 10.0 GB Available Hard Drive Space 100Mbit TCP/IP CD-ROM/DVD-ROM Drive Sound Card USB Port 	
Other Requirements	Other Requirements	
 1024x768 resolution monitor @ 32 bit Internet Explorer 7 Speakers/Headphones (Recommended) Word Processor (Recommended) 	 1024x768 resolution monitor @ 32 bit Internet Explorer 7 Speakers/Headphones (Recommended) Word Processor (Recommended) 	

VGA Display Settings

The Chiro8000 requires a minimum of 1024x768 pixels as well as 32 bit color. Always use the Microsoft Small (Default) 100% DPI settings from within the Display settings. A screenshot of the Display Control Panel (Windows Vista/7) is shown to the right.

Control Panel Home	Make it easier to read what's or	n your screen	
Adjust resolution Calibrate color	You can change the size of text and othe temporarily enlarge just part of the scree	r items on your screen by choosing one of these options. To n, use the $\underline{\mbox{Magnifier}}$ tool.	
Change display settings Adjust ClearType text	Smaller - 100% (default)	Preview	
Set custom text size (DPI)	Medium - 125%		
	Larger - 150%		

Choosing a Medium or Large setting many result in buttons and/or options disappearing from the Chiro8000 software.

Windows regional options must also be set correctly for the program to run. Most North American sold computers will come with Windows pre-configured to match the correct Time/Date/Currency formats. However, should a change be needed you can access Regional Options from the control panel. The following settings are required:

- US English
- "\$" Currency
- "MM/DD/YYYY" Date Format
- "h:mm:ss:tt" Time Format

Additional Items or Services Required:

Internet functionality may be required for certain features within the software. Separate fees may be incurred from your service provider. Your office may require a physical network adapter appropriate for local area, wide area, or wireless connections. Any support of these devices as well as devices including but not limited to: physical hardware, network connections, printers, telephony services would be handled by your local IT technician.

Printers

The 8000 software supports all Windows compatible printers. Check your Devices and Printers section of the Control Panel to ensure the printer and/or drivers are working correctly. Dot Matrix printers are supported in graphics mode only.

Third-Party Software

You can launch and / or interface with a variety of third party software from within the 8000. This is including but not limited to your default Internet Browser, Microsoft Word, Microsoft Notepad, and Microsoft Calculator. For certain functions of the software to be utilized (exporting Merged Letters to a word processor, viewing electronic claims files, amongst other features) you must use Word Pad, Microsoft Word, or another Word Processing program.

Note: Support and /or operation of any software packages not created in part or whole by Forté Holdings, even when utilized through the 8000 software, is not supported. Please consult the manufacturer's documentation for instructions on utilizing those programs.

3

Installation

Installation of the v13 and Converting Your Data

P

rovided your computers meet all system requirements listed in the previous chapter, we are almost ready to begin the installation process. If you are running Windows Vista/Windows 7 you must turn off the User Account Control prior to inserting the installation CD.

Windows Vista	Windows 7	
Click the Windows Icon	Click the Windows Icon	
Click the Control Panel	Click the Control Panel	
Click Classic View	Click Category View	
Click User Accounts	Change View to 'Small Icon'	
Click Turn user Account Control	Click User Accounts	
On/Off	 Click Change User Account Control 	
• Uncheck the Box	Settings	
Click Ok	 Lower the Slider to Never Notify 	
Reboot Your Computer	• Click Ok	
	• Reboot the Computer	
	-	

Once the system has rebooted **disable** all anti-virus and firewall prior to the installation of the software. Upon successful installation you may re-enable any anti-virus / firewall programs utilized on the system. However, port 1433 (SQL) and port 14003 (proprietary file management, FileServer) must be configured to allow incoming/outgoing traffic across the network. Due to the vast amount of security software available as well as the on-going updates to them, we are unable to support individual security software or how to configure them. For any questions regarding configuration of your specific software package reference the manufacturer's instructions.

Installation

After inserting the 8000 Installation CD you will be presented with an 'AutoRun' Prompt shown in the screenshot to the right. The only option relevant to this manual will be the first button, Chiro8000. At this point click the icon to begin the installation process.

You will be presented with another reminder at this point to disable all antivirus and firewall software. If you have not done so, ensure that they are disabled before proceeding to the next step.



Once you have confirmed they are disabled click ok. Welcome to the InstallShield Wizard for the Chiro8000 v13. Click Next to Continue. You will be presented with the terms and conditions of your license agreement. You will have two options, to accept or decline the terms and conditions. If you decline the terms and conditions please contact our client services team. Otherwise, click 'I accept the terms of the license agreement'. If you wish to print these you will find a print icon in the lower right hand corner.



INSTALLATION

Chiro8000 v13 - InstallShield Wizar	d	— X—
	Click the type of setup you prefer. I. Single Computer or Network Main Computer 2. Network Workstation 3. Database Only (Advanced Users Only)	Description Use this setup to perform a complete installation. This installation should be used for either single computer or a network server.
InstallShield	< <u>B</u> ack <u>N</u> ext >	Cancel

Our next screen will be the setup options for this specific system. (Whether this system will be a server, workstation, or database only)

- 1. Single Computer or Network Main Computer This installation is performed when the office is running a single computer (no workstations) or you have multiple computers but the main server (where the data is stored) is used on a daily basis (e.g. your main computer happens to be your front desk terminal).
- 2. Network Workstation This installation is only for offices running a network. This installation is for all computers outside of the main server. This would also be selected for installations to offsite computers who are remotely connecting into the office.
- 3. Database Only This option is for advanced users only. This installation will not put a full copy of the software onto the selected computer. This is typically for situations where the server is located in a 'server room' / closet or may not have a monitor attached to it.

Once you have made your selection hit next at the bottom of the screen. If at any point you wish to return to a previous window you may press the back button. After hitting next you will be presented with one of two dialog boxes. The only difference between the dialog boxes are whether you initially chose a server or workstation installation. The server dialog box will confirm the name of the Server, the workstation dialog box will ask you to enter the Server Name (for networking purposes). Click Ok on the InstallShield prompt (Server) or enter the Workstation. Both screenshots are shown below.



(Server Installation)

Chiro8000 v13 - InstallShield Wiz	ard 📃	3
Select computer where the data	base resides.	
	Please enter the computer name where the database resides.	
	localhost	
InstallShield	< <u>B</u> ack <u>N</u> ext > Cancel	

(Workstation Installation)



The next screen will display the default location where the software will be installed. Depending on whether you have a 32 bit or 64 bit system, it may install to either Program Files or the Program Files (x86) directory on your main Hard Drive with a sub directory of Forte Holdings, then another directory under that of Chiro8000. The subsequent screen will also confirm the creation of a shortcut under the Start Menu. Unless you are an advanced user, leave the values a default.

32 Bit Installation - C:\Program Files\Forte Holdings\Chiro8000

64 Bit Installation - C:\Program Files (x86)\Forte Holdings\Chiro8000

Once you have confirmed both screens by selecting next you will be presented with a screen confirming you are ready to proceed with the installation. Simply click install to begin the installation process. This will take approximately 15 - 20minutes to install dependent upon speed and age of your system; as well as the operating system and whether you are installing a workstation or server (servers will take approximately 5 minutes more than a workstation due to the SQL components).



SQL Notes

If you have previously utilized the Chiro8000 Version 11, the program may find that the SQL component is already installed and utilize the existing SQL Engine. .NET Framework is also a requirement of the software and should come pre-installed on most modern PCs. If your computer does not have the required .NET Framework (1.1 & 2.0) it will be include during the installation process. As mentioned before, if you are a previous user of the software you may already have an installation of SQL. If you do have an existing installation, InstallShield will prompt you with a dialog box asking you to enter the 'SQL SA Password'. You can determine which version of SQL you are running by following the steps at the top of the next page.

Windows XP / Windows 2000	Windows Vista / Windows 7
Click Start	 Click the Windows icon
Click the Control Panel	Click the Control Panel
Click Add/Remove Programs	 Click Programs & Features
• Look for Microsoft SQL Desktop Engine	• Look for Microsoft SQL Desktop Engine
or SQL Server 2005	or SQL Server 2005

If you find a copy of Microsoft SQL Desktop Engine installed please call the technical support team at 800-464-1740 as we will need to assist you with removal of the previous version and installation of the new version of the SQL. If you find you already have an installation of SQL Server 2005 simply enter the password of 'forte_sqlexpress'. The password is case sensitive.

Finishing Up

Once SQL Server has installed and provided you the screenshot above, or you have manually entered the SA Password, this will conclude the installation process. You should be presented shortly after with a screen informing you that the installation has been completed successfully. The next prompt will ask you if you wish to install the Time Clock software. It is included as part of your patient relationship suite. This will allow you to keep track of employee hours, vacations, timecards, and every aspect of your payroll. If you already utilize another payroll solution or you already have Time Clock installed click cancel.

Note: Do not install Time Clock if you already have it installed. If you wish to utilize Time Clock hit next and follow the subsequent prompts.

Registration and Setup

After installation you will want to register your database before proceeding forward. The registration screen shown to the right will appear after double clicking the version icon (located on your desktop). Enter your account number into the first field. all demographic information will be populated from our database. However, when registering if you need to adjust your zip code for the new 5010 requirements you may do so after hitting retrieve info. The CD Key section will accept five digits per box. The cd key

🕴 Online Registi	ration 🕱
Account No:	
First Name:	Last Name:
Clinic Name:	
Address:	
City, State Zip:	
CD Key:	
To perform onli have access to t	ne registration, an internet connection is required. If you do not he internet, <u>click here</u> to register offline.
	Retrieve Info Register Close

should have been attached to your blue bifold. If you need to register in an offline format please contact our client services team and they will be happy to provide you that information.

Once the data has been entered click 'Retrieve Info'. The fields should now all be populated. After confirming the onscreen information is correct click register. You may now re-launch the application. Each time you open the software you will be presented with a username/password prompt. The first time you login you will utilize the username of 'MASTER' and a password of 'SECRET'. (Case sensitive). Once you have launched the software you do have the option to add/edit the username and/or password.



After logging in you will see our welcome Window. At this point you must confirm whether you are an existing customer of the 8000 or a new customer. If you are a new user, you will have the opportunity to fill out your clinic information. To specify you are a new user click 'I am a new user' and hit next. All other customers (previous users of our software) select 'I am an existing user'. You will then be presented with the conversion wizard to proceed. New users can skip to the top of page 14.

Note: If you are a current Version 13 customer and simply installing a new server, stop here and close the Setup Wizard/8000 Software. There will be a subsequent section in the manual regarding restoring data to a new system.

Conversion

For those existing customers who selected 'I am an existing user' and hit next you should be presented with a dialog asking if you wish to skip the conversion or Start the Conversion now. At this point make sure that all computers running any version (current or previous) of the software are logged out. Click Start the Conversion Now. You will be presented with a screen displaying all versions from which you can convert. Most customers will be converting from Version 11 which also uses an SQL database. Since both programs utilize SQL the conversion time is greatly decreased (10 to 15 minutes is a comfortable average, usually less). If you are converting from a previous version the process can take between 2 and 4 hours. A progress indicator will show you how much data has been converted. You cannot utilize the software until the conversion is complete. Do not cancel the conversion.

Note: Prior to converting the data, your old version (e.g. 11.x, 10.x, etc) must be completely up to date. For a full listing of all updates and to download our service packs visit <u>www.chiro8000.com</u>.

🙀 Conversion Utility	8
Previous Version Select the version that you are converting to the Chiro8000 version 13	
 I am converting from the Chiro8000: Version 12.x Version 11.x Version 10.x 	
 I am converting from the Chiro 7000: Version 9.5x Version 9.0x Version 8.5x or earlier 	
Back Next Car	ncel

Location of Data:

Version 12 – The program will automatically find your database

Version 11 – The program will automatically find your database

Version 10 – The Conversion Wizard will ask where the data is stored. Default location is c:\Program Files\Forte Systems\Chiro8000

Version 9 – The Conversion Wizard will ask where the data is stored. The file path should either be **c:\mbachi** or **c:\mbapro**.

Setting up Clinic and Doctor Information

For our new users you should be seeing the Clinic setup Window listed below.

Name:	FortePaid		
Address:	5137 Golden Foothill Pkwy		
City:	El Dorado Hills		
State:	CA	Zip Code:	95762
Phone:		Fax:	
Email:			
Website:			
Sales Tax Pct:	0.000 %		Enable User Logi

On this screen the Name, Address, City, State, and Zip Code will be greyed out. These items are populated by your license with us (the documentation you filled out when you purchased the software). If there are any questions or concerns regarding this content please contact our client services team.

Of the boxes available, all fields are optional. If you choose not to fill out any of this information now, you will have an opportunity to do so at a later time. Sales Tax Percentage is used to calculate any items in the system taxable (e.g. supplements). We recommend always leaving enable user login checked. At this point you may check the 'Do Not Show this Screen at Next Startup' box to ensure this does not come up again in the future. Once you have completed this, click next.

The final screen in the setup process is the Doctor Setup screen.

	tor Setup				
ast Name:	Holdings		First Name:	Forte	
Display Name:	Forte Holdings				
Phone:		Ext:		Fax:	
Email:					
Website:					
SSN:			Federal ID No:	213213	
State Lic. No:			DEA No:		
NPI:					
Jser Field 1:			User Field 2:		

Like the Clinic Setup, certain fields are greyed out, specifically the First and Last Name. Those fields are pulled from our database. However, the remaining fields may be edited. We will cover several of the important fields before moving on.

Display Name is the Doctor's name as it will appear on the

printed HCFA. The phone number will appear on the HCFA, statements, and other information as well. SSN represents the doctor's social and federal ID is going to be his/her TIN (tax ID). The NPI on this screen should be the Doctor's individual NPI no.

Prior to clicking finish ensure all fields are filled out accurately. You will be able to edit this at any time, however, by going into the View menu in the software, clicking Doctor List, and double clicking the doctor in question to edit their information.

Database Maintenance

Backing Up, Restoring, Switching Servers

he Chiro8000 includes an integrated utility to backup or restore the Chiro8000 data. To open the Database Utility from within Windows

- Click Start
- Click All Programs
- Click Forte Holdings
- Click Chiro8000
- Click Database Utility

Database utility

30 · · · · · · · · · · · · · · · · · · ·	Backup	 Hestore 	i Manage	Compact	2 - 🕑
ached to the se	rver:				
3 MAIL					
	ached to the se	ached to the server:	ached to the server:	ached to the server:	ached to the server:

There are two supported methods for backing up the 8000 database. We offer both an automated method as well as a manual method. We will walk through both options in this section. Other options include Compacting, Managing, Attaching and Restoring the Database. Many of these options are only intended for advanced users or system administrators. We strongly caution against utilizing any of the options except Backup/Restore, unless you have first confirmed that a successful backup of your data has been made. Furthermore, some options may require a password to access. For more information on those sections you will be required to call Technical Support. All database maintenance is done from the server level.

The process of attaching or detaching of a database should only be utilized if a suitable backup was not made, or a technical support representative has instructed you to do so.

Note: Never attach or detach a database while the Chiro8000 is running. Performing maintenance on an open/running database can cause permanent damage to the physical file.

Backing up a Database

Forté Holdings recommends backing up your database once a day and storing all backups in a secure location, preferably on a different hard drive or partition from the 8000. You should also save backups with the default file name which will include the name of the database as well as a date stamp. This will make it easy to find and return to a particular day's backup if necessary. We do not support or recommend any third party automatic backup methods as not all programs are designed to be utilized with SQL databases. Please check with your third party backup software vendor to ensure they are qualified to interact with SQL databases. We do have a built in automatic utility which can create a backup at scheduled intervals to an external hard drive or USB stick.

Furthermore, if you utilize the Record Center feature or Patient Images from within the Chiro8000 software it is recommended that you periodically make backups of the 'Data' folder located within the Chiro8000 subdirectory. In 'Data' are the following important folders:

- Documents
- Forms Center
- Images
- Patient File Images

These folders may contain anywhere from 0KB (if your practice does not utilize a paperless office, attaching records into the software) up to as much space as your hard drive physically allows. Some offices have their entire history attached into the Chiro8000. These aforementioned folders must be backed up manually.

🗟 Database Ut	tility						X
🜏 Detach	📑 Attach	惧 Backup	🕶 📃 Restore	💐 Manage	Compact	* 🖓	49
Databases a Chiro8000_D Chiro8000_E	ttached to the se B MAIL	rver:					
Backup Data Backup dat	abase abase file name	and location:					
C:\Program	Files (x86)\Forte	Holdings\Chiro80	00\Data\Chiro8000_	DB Backup 20111	122.BAK		
					0 📀	<u>K</u> <u>(3</u> <u>C</u> ar	icel

The Chiro8000 contains a message center where you may send/receive email. If you choose to utilize this feature you may wish to create a backup of the CHIRO8000_EMAIL database periodically.

Creating a Manual Backup (screenshot above)

- In the Database Utility Screen, Click Backup
- Highlight the Database You Wish to Backup
- Click the Browse Button (ellipsis) in the lower right hand corner
- · Choose Where you Wish to Save The File from the Windows Lookup Dialog
- Click Save
- Click Ok

Ideally a Message will appear stating "The Backup of CHIRO8000_DB has been completed successfully!" If any message appears other than this please contact Technical Support immediately.



Creating an Automatic Backup (screenshot below)

- In the Database Utility Screen, Click the arrow to the right of Backup
- Click Configure Automatic Backup
- Highlight the Database You Wish to Backup
- Choose an Interval (Perform Backup Every x Days)
- Choose a Date to begin job
- Choose a Time to perform backup
- Click the Browse Button (ellipsis) in the lower right hand corner
- Choose Where you Wish to Save The File from the Windows Lookup Dialog
- Click Save
- Click Ok

🗟 Database Utility					8		
👌 Detach 🛛 📑 Attach	n 惧 Backup 🔻	Restore	💆 Manage	ompact 🛃	🦻 🕑 🛠		
Databases attached to the server:							
Chiro8000_DB Chiro8000_EMAIL							
Perform Backup every:	7 🚔 Dav(s)	- Backu	up location:				
Date to begin job:	11 / 22 / 2011	•					
Time to perform backup:	12:00 AM						
				🛛 📀 O <u>I</u>	Cancel		

The automatic backup method does not send any data to Forté Holdings. To successfully create an automatic backup there are several criteria that must be met. Primarily, the server must be powered on at the time when the backup is scheduled.

DATABASE MAINTENANCE

Second, the program must be non-operational. If an office staff member is using the Chiro8000 at the time when a backup is scheduled to perform, no backup will be made.

Attaching a Database

- In the Database Utility Screen, Click Attach
- Click the Browse Button (ellipsis) in the lower right hand corner
- Select the File in Question from the Windows Lookup Dialog
- Click Open
- Click Ok



Detaching a Database

When a database is detached from the database engine it will be inaccessible until it is reattached. If the program is not successfully closed and a detach is attempted you may receive an error that the program is open or in use.

- Ensure the Program is Closed
- In the Database Utility Screen, Click Detach
- Highlight the Database You Wish to Detach
- Click Ok

Restoring a Database

The restore function is useful if a database has become corrupted or damaged in some way (e.g. from system crash, power failure, hard drive failure). Restoring a database returns the selected file to a previous state. Once the restore is started it will overwrite the information in the current database file. Ensure you have selected the correct file to restore from as this process is irreversible. Furthermore, ensure that you do not power off the system during a backup or restore process as this can cause permanent damage to the database.

- In the Database Utility Screen, Click Restore
- Highlight the Database You Wish to Restore Over
- Click the Browse Button (ellipsis) in the lower right hand corner
- Choose Where the file is located from the Windows Lookup Dialog
- Click Open
- Click Ok (You will be prompted to confirm that you wish to replace the existing
- database with the backup)
- Click Yes

Changing the SQL Server Password

It is not recommended to change the SQL SA Password. By default, the SQL SA Password should be **'forte_sqlexpress'**. If you do need to change it however:

- In the Database Utility Screen, Click the drop down arrow next to the Magic Wand
- Click Change SQL SA Password
- Enter 'forte_sqlexpress'
- Click Ok
- Enter 'forte_sqlexpress' again
- Click Ok

Switching Servers

We understand that sometimes the office may grow, move, upgrade technology, or expand. At these times you may find the need to switch your server. The following is a step by step guide to accomplish this transition. Prior to performing this you will need two items:

- A copy of the Chiro8000 Version 13 Installation CD-ROM
- A current backup of the Chiro8000 Database

Note: If for any reason you cannot find the CD please contact Client Services to order a replacement disc. Furthermore, the old server may contain version 11 or version 12 Chiro8000 databases. These databases are not required to switch servers, and should not be confused with the Chiro8000_DB database.

Once you have all materials collected, simply install the Chiro8000 onto the new computer following the steps in Chapter 3 of this guide. You will then restore the backup of the database using the information you recently learned (utilizing the Database Utility).

The next and final step is pointing the existing workstations to the new server.

DATABASE MAINTENANCE



Each computer has a configuration file which tells the workstation where to point. The configuration file would be located in one of the following two directories by default:

```
32 Bit System – c:\Program Files\Forte Holdings\Chiro8000\
64 Bit System – c:\Program Files (x86)\Forte Holdings\Chiro8000\
```

As you can see in the image above, the third line down says **'Key Name=''Server'' Value=''x''**. You will want to replace 'x' with the name of the new server. Remember during the installation process you will have been given the name of the new server. Once you have changed this configuration file, save and close the document. You should now be able to open the Chiro8000 on the workstations. If for any reason you are unable to or suspect that it may still be pointing to the old server, feel free to give our technical support team a call.

Software Updates

It is recommended that you periodically ensure you have the most up-to-date version of the Chiro8000. This can be done by visiting <u>www.chiro8000.com</u>, clicking updates, and if necessary downloading the most recent update. Updates are always all inclusive (so if you missed one update there is no need to worry). If you are not sure which version of the software you are running click the Help menu from within the main screen of Chiro8000, then select About. There will be a line towards the bottom of the window stating 13.xx.xx with the (x) representing the version you have installed.

You must run the updates on each computer within the office. Always update the server first and proceed from there. Do not download an update if you cannot update all systems on your network at that time. Please ensure the Chiro8000 is updated prior to calling technical support, for the most accurate assistance, as the software and/or its features may change periodically.

5

Important Information

Summary of Important Information

This section is meant to summarize the key points from the manual. This section is especially helpful when dealing with a technician who may need to know key points about the software.

Database Engine – SQL Server 2005 Express Edition (Service Pack 3)

SQL SA Password - forte_sqlexpress

Default Username – MASTER **Default Password –** SECRET

Exclude Firewall Ports - 1433, 14003

Website - www.chiro8000.com

Default Program Location
32 Bit System – c:\Program Files\Forte Holdings\Chiro8000\
64 Bit System – c:\Program Files (x86)\Forte Holdings\Chiro8000\

User Account Control must be disabled to use our software.

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