

SUBJECT: Installation of Import Wizard

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NOTE: We are providing this TechNote as a courtesy to our customers to assist them in understanding and troubleshooting their system problems. The following suggestions are provided for your consideration as actions you may choose to take to correct current or future problems. If you are not familiar with the procedures described in the TechNote, contact your hardware system vendor, software support vendor, or local computer service or networking service vendor. **YOU SHOULD ALWAYS MAKE A BACKUP OF YOUR DATA JUST BEFORE MAKING CHANGES TO YOUR SYSTEM.**

We do not warrant that these suggested changes will correct any particular problem you may be experiencing. We accept no liability whatsoever for any damages of any kind which you may experience in implementing any of these suggestions. Many computer problems are complex by their very nature and may be caused by a variety of factors. If you are not qualified to diagnose and/or perform any of the suggested procedures then please refer all such matters to a qualified technician.

Installation of Import Wizard

Some of the features of Import Wizard include:

- 1) Maps can be customized by Medical Software Tools to parse a multitude of different import file formats. Import wizard can read CSV files or flat ASCII files.
- 2) A log file is created that shows which items rejected and why.
- 3) Import Wizard filters duplicated SSNs.
- 4) Patient IDs that are imported are written to the Patient ID #2 field in Medisoft in case you need to match them up later for any reason. We do not take the legacy Patient ID's or chart numbers from the legacy system and import them to the Chart Number field because Medisoft requires that Chart Numbers must be unique. Creating the Chart Numbers as we import data is the best way to ensure that Chart Numbers are unique when there are existing chart numbers in the system.

Notes:

1) Import Wizard licensing is controlled by an activation key that is generated from an algorithm based on the hardware that you install it on. Please be sure that the computer or workstation that you install Import Wizard on when you request an activation key is one that you want to use to do all your imports.

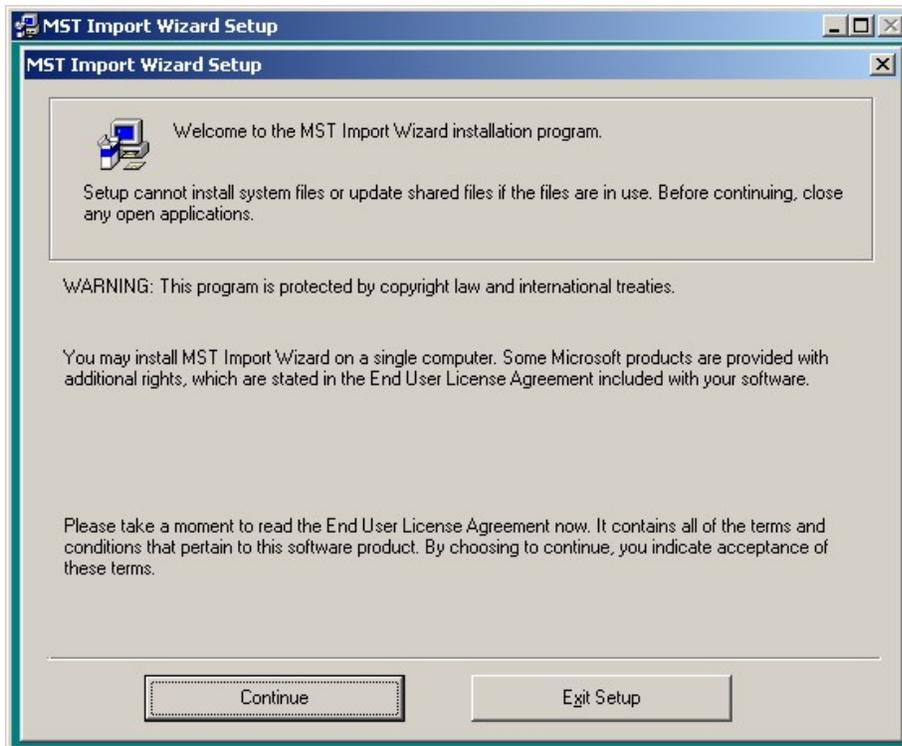
2) You should exit from all other programs before attempting the installation of Import Wizard.

Installation of Import Wizard:

Depending on your operating system (i.e., Windows XP, Windows Vista, etc.) and your security settings when you first attempt to install Import Wizard you may be prompted with a security warning asking you to confirm that you wish to run this program. Select the option to Run or Install the software:



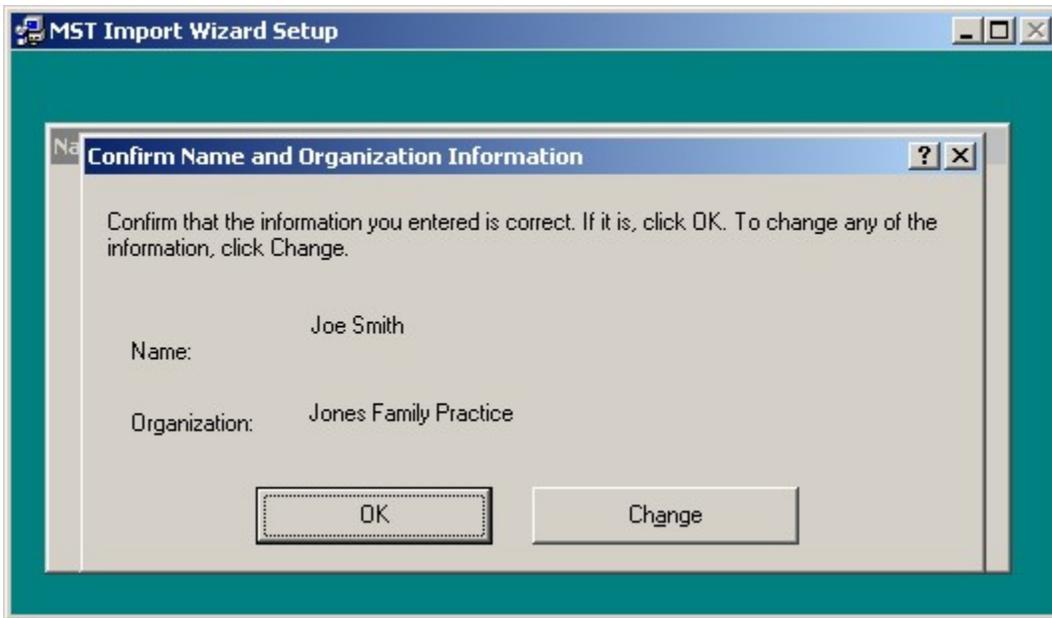
Launching the Import Wizard installation utility will load the following welcome screen:



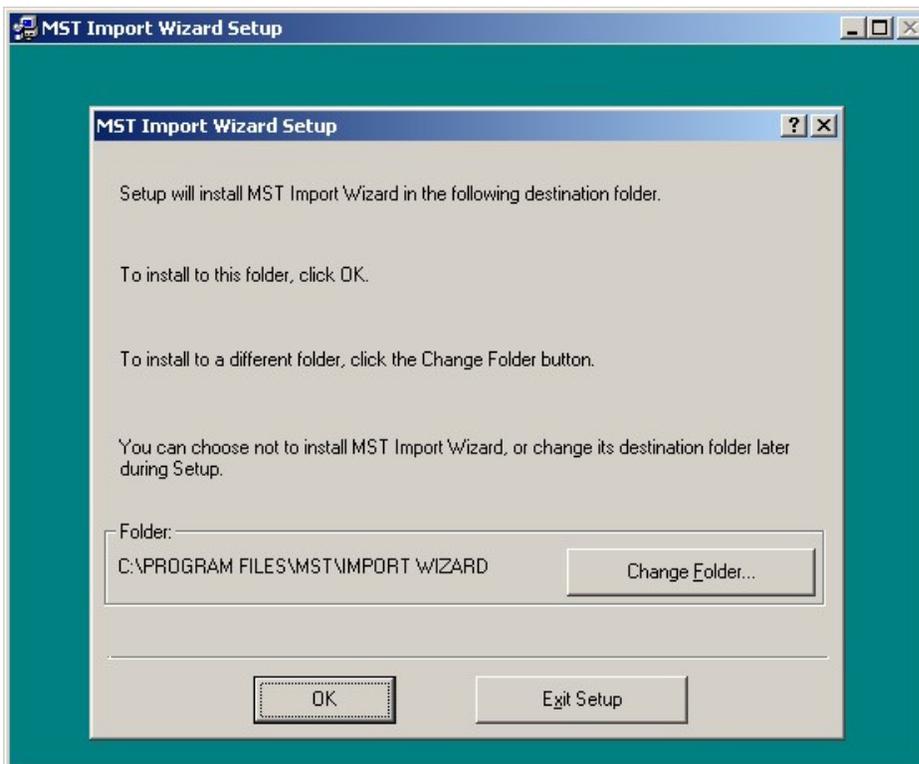
You will then be prompted for your name and organization:



This information will then be confirmed:



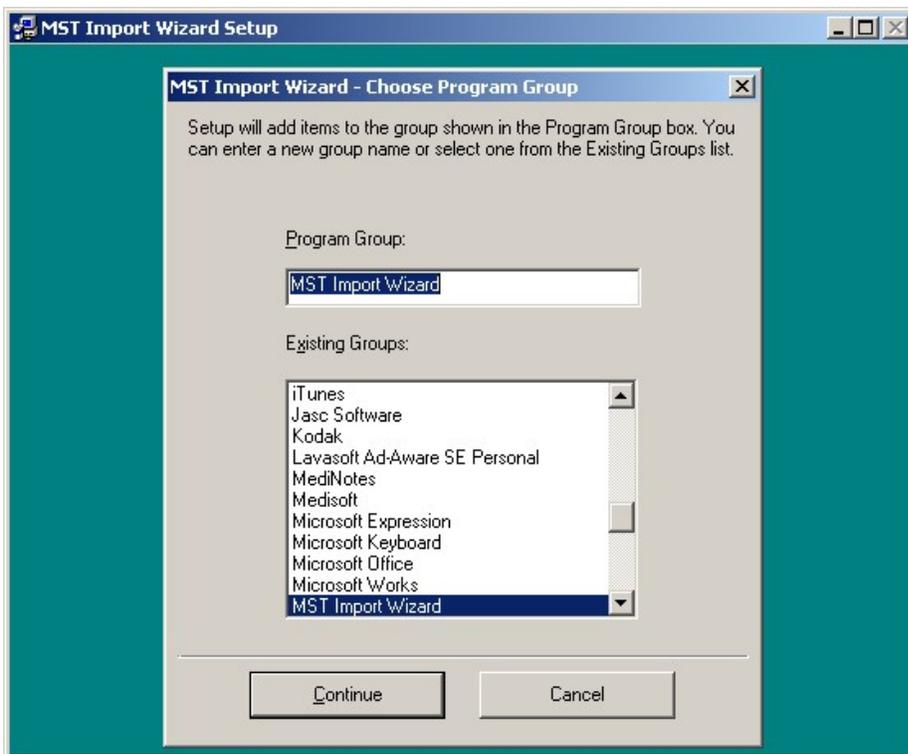
A window will then be displayed showing the installation location with an option to modify where the program is installed:



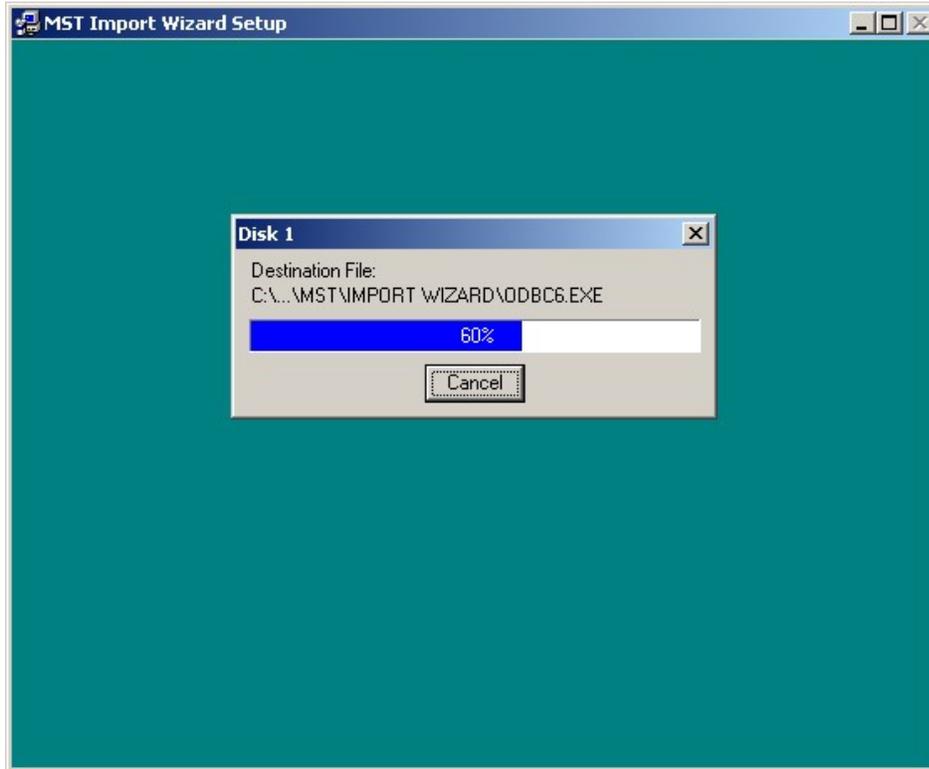
A button will then be displayed which gives you the capability to launch the installation, click the square button with the computer on it to start the installation:



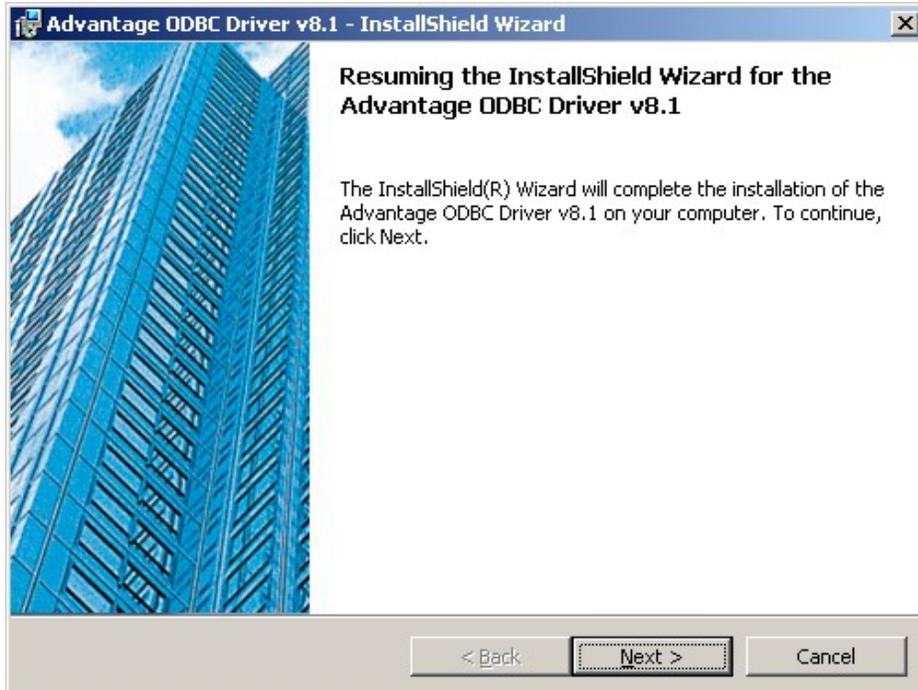
The installer will then display the name of the program group where the shortcut icons will be installed, use the default “MST Import Wizard” and click the “Continue” button:



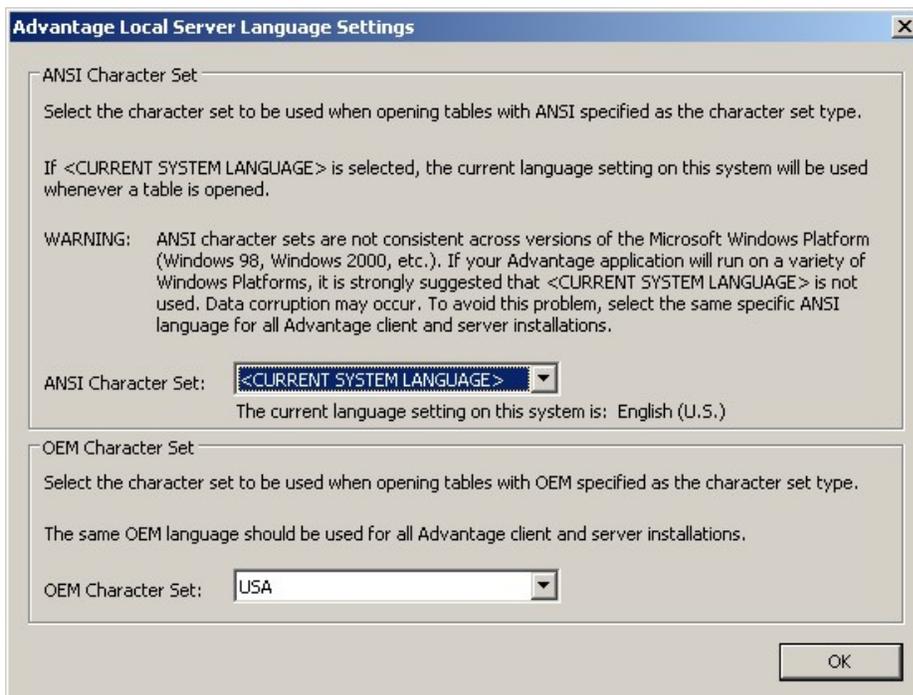
A progress bar will be displayed:



The Import Wizard installation utility will give you the opportunity to install the latest version of the Medisoft ODBC driver. The correct ODBC Driver must be installed for Import Wizard to function properly. When installing the ODBC driver a new window will be displayed:



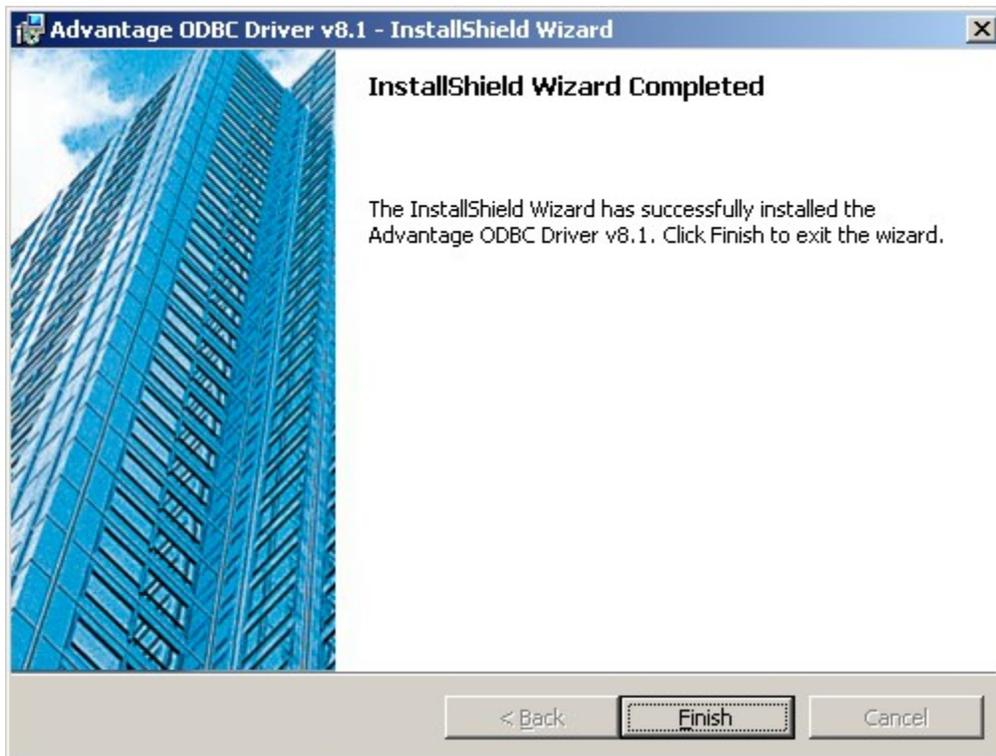
A screen will be displayed with language options, use the defaults and click on the “OK” button:



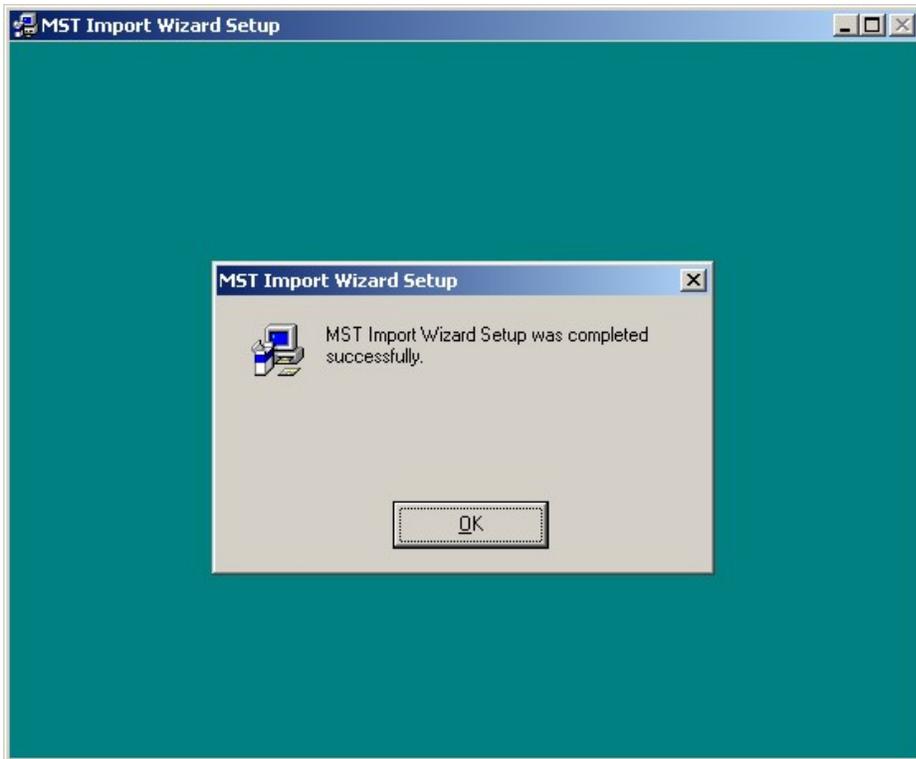
You are given the option to view the Readme.txt file, select an option:



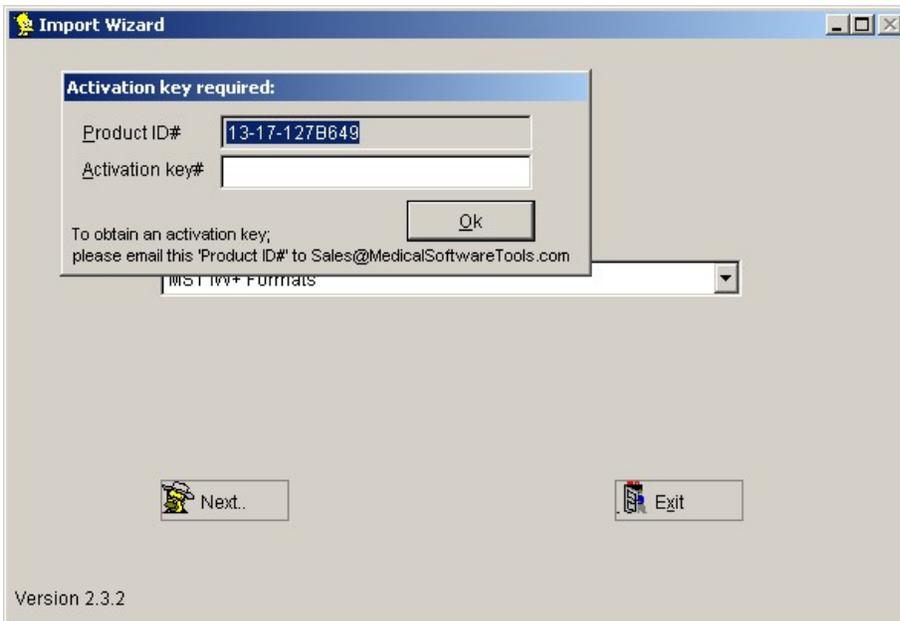
A window will be displayed showing that the installation of the ODBC driver is completed. Click the “Finish” button:



The Import Wizard installer will display a window showing that Import Wizard install is complete, click the “OK” button.



The first time you run the Import Wizard you will be prompted for an activation key.



Test Drive Mode:

If you wish to run the Import Wizard in Test Drive (i.e. demo) mode you can enter the Activation Key of:

TUTORIAL DB ONLY

This demo mode will only allow you to import data to the Medisoft Tutorial database, this database must be installed using your Medisoft installation disk. The demo mode provides you the opportunity to “test drive” Import Wizard or test output file formats that you are developing for export from third party software to be imported to Medisoft.

Sample import files are available on the Medical Software Tools website at:

<https://medicalsoftwaretools.com/download-import-wizard>

Production:

You must email the Product ID# that is generated on your computer to Support@MedicalSoftwareTools.com along with the following information:

- 1) Your name and email address
- 2) Business name that purchased Import Wizard (if a business is involved in the purchase)
- 3) Practice name if applicable

When the Product ID# is displayed, Import Wizard automatically loads this number in your paste buffer so all you have to do is start an email and press <CTRL><V> to paste the Product ID# into your email.

Technical Support:

If you have technical questions or problems you can email for Support at Support@MedicalSoftwareTools.com. Please be sure to include:

- 1) Your name, the business name that purchased Import Wizard, the practice name if applicable. A detailed description of the error that you are experiencing
- 2) What you were doing when the error occurred
- 3) Screen prints of typical error windows (especially the first and second error messages as additional error messages are usually caused by the first error message). Screen grabs can normally be made by using the <Alt><PrtScrn> keys and then using <Ctrl><V> to paste them into your email.

or call Medical Software Tools at 703-558-9040.

30 days of free telephonic support is included with the purchase of Import Wizard. After the initial 30 days telephonic support will be billed in quarter hour increments. At the time of this writing our base hour of phone support is billed at \$110/hour.

Additional Activation keys are subject to approval and a \$50 charge.