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Installation

Before You Install

Caution: *The following software versions are recommended in order to perform incremental backup/restore operations on your database server:*

- *Use SQL Server 2008 SP1 or SP2 or SP3, or SQL Server 2008 R2 SP1*

Microsoft .NET Framework 3.5, 4.0 and Windows Installer 4.5

Microsoft .NET Framework 3.5 SP1, 4.0 and Windows Installer 4.5 (or later) is the software framework and installation software needed to properly install and run EncorePro 2. You cannot install EncorePro 2 without this software.

If you do not have Microsoft .NET Framework 3.5 SP1, 4.0 or Windows Installer 4.5, a window will pop up stating that you will need to install them before installing EncorePro 2. When you begin installation, EncorePro 2 will install them automatically, or you can download them from www.Microsoft.com/downloads.

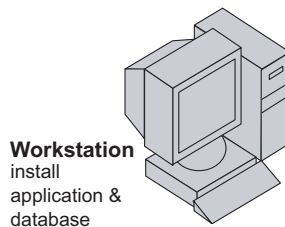
Restart your computer after each individual installation of Microsoft .NET Framework 3.5 SP1, 4.0 and Windows Installer 4.5.

Note: *When you install Windows Installer 4.5, the installation wizard window will be titled as a "Hotfix." This is the correct installation for Windows Installer 4.5.*

Choose an Installation Configuration

EncorePro 2 has been designed to operate in three possible configurations:

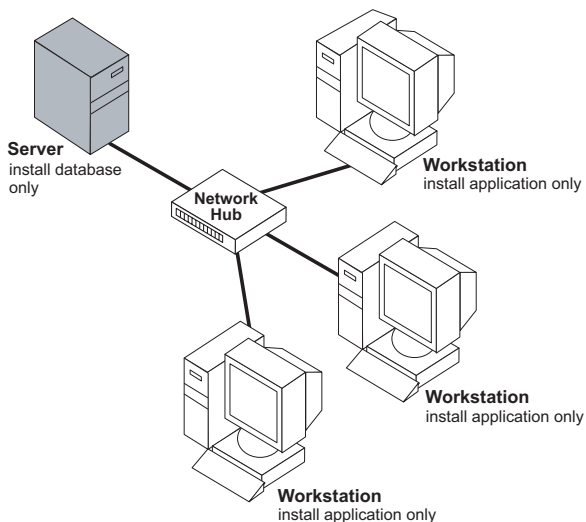
Single Computer setup



This type of configuration is ideal if you will be using the EncorePro 2 application and database on one single computer:

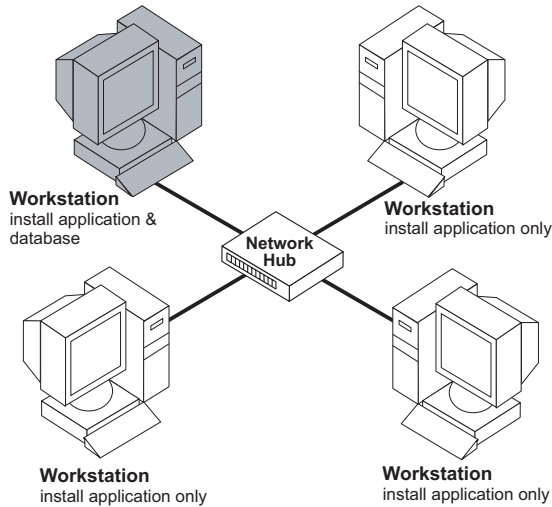
If you choose the single computer setup, you should choose a **Typical** installation when prompted.

Over a network where the database resides on a server



This type of configuration is ideal if you will be using a network to connect individual workstations to a database server:

- If you choose this setup, you should choose an Advanced installation to install the database server software only.
- Next, you will need to install EncorePro 2 client only on each workstation. When prompted, choose an Advanced installation on each workstation and install the EncorePro client only.

Over a network where the database resides on a workstation

This type of configuration is ideal if you will be using a network to connect individual workstations to one workstation containing the database.

- If you choose this setup, you should choose a Typical installation on the workstation that will contain the database when prompted.
- Next, you will need to install EncorePro 2 client only on each remaining workstation. When prompted, choose an Advanced installation on each workstation.

Installing or Upgrading EncorePro 2

Note: *If you currently have EncorePro 1.8 and would like to retain your data, see the **Transferring Data from EncorePro 1.8 to EncorePro 2** section.*

The EncorePro 2 installation CD includes the EncorePro 2 application, the database server software, a data migration utility (used to transfer your data from EncorePro 1.8 to EncorePro 2), and the Encore Patient Recalculation (EPR) Service.

The EPR Service is used to maintain and clean up the data in your EncorePro database. The service updates summarized patient compliance and therapy data when there is a change to the patient's start time of day or the office's time zone. Additionally, the EPR Service is used to calculate the summarized compliance and therapy data.

To begin the installation, insert the CD into your computer's CD-ROM drive. If the installation wizard does not appear within 30 seconds, click **Start > Run**, then **Browse** to the CD and **Open** the *EP2PreSetup.exe* file, then click **Install EncorePro 2**.

Once the EncorePro installation begins, follow the steps below.

License Agreement

Click **Next** to progress to the License Agreement screen.

- Read the License Agreement.
- Then, choose "I accept the terms in the license agreement," if you agree with the terms and conditions, and click **Next**.

Choosing the Installation Type

Next, select the installation type, either Typical or Advanced, based on the type of configuration you decided to use.

If you currently have a previous EncorePro 2 version installed:

- A **Typical** installation will update your client, update your currently installed database, default to your current authentication settings, and install the EPR Service. For more information on installation options, see the Installation and Administration Guide.
- An **Advanced** installation will allow you to choose which features to upgrade or install, based on the type of configuration you currently use. In an advanced installation, you can choose to upgrade the entire EncorePro 2 application, EncorePro 2 client only, the database, the data migration utility, and/or the EPR Service. The EPR Service needs to be installed on at least one computer in your network, but it can be installed on all.

If you do not currently have EncorePro 2 installed:

- A **Typical** installation will install the EncorePro 2 client, the database server software, and SQL Server 2008 Express SP3, if needed. In this installation type, a new server, named “EncorePro2,” will be installed and the authentication configuration will automatically be set to Forms Authentication during installation.

Note: *The authentication configuration cannot be changed after installation. See the **Choosing an Authentication Configuration** section for more information.*

- An **Advanced** installation will allow you to choose which features to install, based on the type of configuration you decided to use. In an advanced installation, you can choose to install the entire EncorePro 2 application, EncorePro 2 client only, the database with the server, the database only, the data migration utility, and/or the EPR Service. The EPR Service needs to be installed on at least one computer in your network, but it can be installed on all.

If you choose a **Typical** installation, click **Install** to complete the installation process.

If you choose an **Advanced** installation and are upgrading from a previous EncorePro 2 version, your current database, server, and authentication settings will remain unchanged. Proceed with the on screen instructions until the upgrade is complete.

If you choose an **Advanced** installation and are not upgrading from a previous EncorePro 2 version, continue with the steps below.

Choose a Destination

Next, choose the directory where you would like to save EncorePro 2.

- To choose the default location, click **Next**.
- To choose a different location, click the **Change** button. Choose the destination where you would like EncorePro 2 to be saved. Then, click **Next**.

Choose the Features to Install

Next, choose the specific features you would like to upgrade or install. You can choose to upgrade or install the client, the database, the server, and/or the EPR Service, based on the type of configuration you decide to use.

If You Choose to Install or Upgrade the Client Only

Next, you will need to choose the existing instance of SQL Server that you wish to use. Enter the database server you wish to use. You can either type in the location of the database, or click the **Browse** button and find the location.

- Once you have finished choosing your database, click **Next**.
- Then, click **Install** to complete the installation for the client only.

If You Choose to Install the Entire EncorePro 2 Application or the Database Only

Next, you will need to choose which server that you wish to use.

Note: *If a message appears stating you need to enable Filestream, follow the **Enable Filestream** instructions in this guide.*

- Enter the server you wish to use. You can either type in the location of the server, or click the **Browse** button and find the location.
- Once you have finished choosing your server, click **Next**.
- Then, proceed to the **Choosing an Authentication Configuration** section of this guide.

If You Choose to Install the Database with the Server Only

Next, choose the Instance Name for your server:

- The Instance Name screen will appear.
- Here, you can accept the default instance name “EncorePro2,” or enter a new instance name.
- Once you have finished choosing your Instance Name, click **Next**.
- Then, proceed to the **Choosing an Authentication Configuration** section on the next page.

Choosing an Authentication Configuration

Next, choose the type of authentication you would like to use when logging in to the EncorePro 2 application. You can choose either **Forms Authentication** or **Windows Authentication**.

Note: *Once you choose this option, it cannot be changed after the installation is complete.*

Forms Authentication will prompt the user to enter a user name and password whenever the EncorePro 2 application is started.

Windows Authentication will use the Windows user name and password the user is currently logged in as when the EncorePro 2 application is started.

If you choose **Forms Authentication**:

- The first time you open EncorePro 2, enter the default EncorePro 2 user name and password:
User Name: “EncoreAdmin”
Password: “password1”
- Then, you will be prompted to change the user name and password.

Note: *If the administrator forgets the “EncoreAdmin” account password, the Reset Admin Account utility can be used, with the assistance of Respirationics Customer Support, to reset the “EncoreAdmin” account password. This utility is installed by default and should only be used by administrators. Administrators may choose to remove this utility from workstations as an added measure of security.*

If you choose **Windows Authentication**:

- The current user logged into Windows will be listed as the default.
- But, you can choose the Windows user name you wish to use by using the **Browse** menu.

For more information on authentication settings, see the *Security Settings* section in this guide.

When you have finished choosing your authentication configuration, click **Next**.

Then, click **Install** to complete the installation.

Transferring Data from EncorePro 1.8 to EncorePro 2

To transfer data from EncorePro 1.8 to EncorePro 2, you need to install the data migration utility. If you chose an Advanced Installation and selected to install the data migration utility, it should begin installation after the EncorePro application/feature installation is complete.

Note: *Respirationics recommends that the data migration utility be installed on the computer currently running EncorePro 1.8.*

When the installation wizard begins, click **Next**.

License Agreement

- Read the license agreement.
- Select “I accept the terms in the license agreement,” if you agree with the terms and conditions, and click **Next**.

Choose a Destination

Next, choose where you would like to save the data migration utility.

- To choose the default location, click **Next**.
- To choose a different location, click the **Change** button. Choose the destination where you would like EncorePro to be saved. Then, click **Next**.

Choose a Destination Database

Next, enter the location of the EncorePro 2 database. You can either type in the location of the database, or click the **Browse** button and find the location. Then, click **Next**.

To complete the installation, click **Install**.

Enabling Filestream

Before upgrading an existing SQL Server database instance, be sure to enable the SQL Server instance to use Filestream data storage.

- Open the SQL Server Configuration Manager.
- Right click on **Server**, and go to **Properties**.
- Click on the Filestream tab, and enable all three options.
- **Do not** restart your computer yet.
- Open Management Studio.
- Select your server, and connect to it.
- Right click on **Server**, and go to **Properties**.
- Go to **Advanced**, and set Filestream access to **Full Access**.
- Click **OK**, and restart server service.

Configuration

Company Settings

Once EncorePro 2 is installed, configure the company settings.

- Click on the **Company Settings** tab, then the **Preferences** tab.
- Click the **Edit** button, and set each of the parameters listed.

Only users logged in to EncorePro 2 as a Company or Office Administrator can change the Auditing options. For more information on the Company Settings tab, see the EncorePro 2 online help or the User Guide.

Database Server Connection

EncorePro 2 has an editable configuration file, "EncorePro.exe.config" located in the folder where the EncorePro 2 application is installed. This file is only editable by a system administrator. Within the configuration file, the system administrator can edit the database server connection by changing the user name, password, and database server location.

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <appSettings>
    <add key="DICConfig" value="assembly://Respironics.EncorePro.Config/Respironics.EncorePro.Config/DICConfig.xml" />

    <!-- Change this to your local db server -->
    <add key="DBServerAddress" value="DevENetBaySql3" />
    <add key="uid" value="ooJPPtfn5BxETjpvq5G3Jw=" />
    <add key="pwd" value=" k17PwMcN4fGJJurIjPPJgA=" />
    <add key="AuthMode" value="SQLUSER" />
    <add key="DBName" value="EncoreDB" />
    <add key="AuditDBName" value="EncoreWarehouse" />
  </appSettings>
</configuration>
```

Database server connection parameters in the configuration file

Log File Settings

A system administrator can also edit the log file settings in the configuration file. The log file name, folder name, file size, the amount of log files stored, and the level of logging can all be changed. The level of logging is controlled with a value between “0” (none) and “4” (detailed definition). See below for an example of the logging settings in the configuration file.

```
<!--Logging Settings-->
<add key="LogTraceListener" value="TextWriter" />
<add key="LogFileDirectory" value=".\\logs" />
<add key="LogFileName" value="e\log.txt" />
<!-- The maximum size the log file will grow to in MB before being rolled over.-->
<add key="MaxLogFileSize" value="1"/>
<!-- The maximum number of log files to retain, current log file + rolled log files.-->
<add key="MaxNumberOfLogs" value="10"/>
</appSettings>

<system.diagnostics>
  <switches>
    <!-- Value meanings-->
    <!-- 0 None-->
    <!-- 1 Error / Fatal-->
    <!-- 2 Warn-->
    <!-- 3 Info-->
    <!-- 4 Debug-->
    <add name="EncoreTraceSwitch" value="4" />
  </switches>
</system.diagnostics>
</configuration>
```

Logging settings in the configuration file

Security Settings

Authentication

Your authentication configuration, either Forms or Windows, is chosen during installation. This configuration cannot be changed after installation.

Forms

Forms authentication requires a user name and password to be entered when a user starts EncorePro 2.

When adding a new user to EncorePro 2 using Forms authentication, the administrator needs to assign a new user name and password to each user added.

Windows

Windows authentication uses the current Windows user information. When a user opens EncorePro 2, the application will automatically authenticate the user based on the Windows user information. The user will not be prompted for a user name and password.

When adding a new user to EncorePro 2 using Windows authentication, the administrator chooses a user from a drop down menu of all current Windows users on that computer or network.

Security Roles

When adding a new user to EncorePro 2, the administrator chooses one or more security roles for the user. The security roles are Company Administrator, Office Administrator, Clinical User, Clinical Assistant, Physician, and Report User. For more information about security roles and adding new users, see the EncorePro 2 online help or the User Guide.

Back up Information

Respironics recommends using SQL Server Management Studio Express to back up your EncorePro 2 database. SQL Server Management Studio Express is available as a free download at www.microsoft.com/downloads. Follow SQL Server Management Studio Express' instructions for backing up or restoring your database.

Respironics recommends backing up your database and storing the saved database from your hard drive to a CD or other secure media at least once a week. The more frequently you back up your database, the more recent your data will be if you need to restore your database.

Customer Support

If you need additional help, contact Customer Support:

- United States: 1-800-345-6443
- International: 1-724-387-4000



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1114812 R04
RPM 08/28/2018
EN-DOM