PowerScribe® 360 | Reporting

Montage Installation Manual

The latest version of this manual is available from the Oracle iSupport Library on Solution 16914.

PN 889681 ***March 14, 2016***

PN 889681

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Table of Contents

MONTAGE IMPLEMENTATION FOR POWERSCRIBE 360 | REPORTING 1

Upgrading

Before starting the upgrade, ensure that the PostgreSQL data drive or partition has sufficient free space (e.g. not 90% full).

A database backup is highly recommended prior to upgrade.

Do not use the Nuance SQL user account to configure the Montage Crawler. Before upgrading Montage, a Microsoft SQL account on the system database server with access to the COMM4 database is required to access the Montage Crawler.

Prior to any upgrade, the FE must obtain the License files from the assigned Nuance PM for the project.

If Montage is installed, you must upgrade the Montage server to the latest Nuance approved version.

You need access to https://stats.montagehealthcare.com/upload.

Create Montage User in COMM4 Database

Run this SQL Script against the master database where Comm4 database resides.

This script will create a specific account for Comm4 read-only access for Montage Crawler Services.

```
----------

USE [master]
GO
CREATE LOGIN [Montage] WITH PASSWORD=N’M0nt@g3!’,
DEFAULT_DATABASE=[master], CHECK_EXPIRATION=OFF,
CHECK_POLICY=OFF
GO
USE [Comm4]
GO
CREATE USER [Montage] FOR LOGIN [Montage]
GO
USE [Comm4]
GO
EXEC sp_addrolemember N'db_datareader', N'Montage'
----------
```

Download Software

Download the Montage software only from the DML. DO NOT download software from the Montage support site.

PostgreSQL 9.1.9

Due to CVE-2013-1899, existing Montage installations on Windows, must upgrade their PostgreSQL installations from 9.1.1 to 9.1.9.

It is suggested, though not required, to back up the PostgreSQL database before proceeding. Since it is a minor point release, the PostgreSQL upgrade will upgrade the existing installation in place.

If upgrading from 2.5, run the standard upgrade process. On Windows, stop the Apache and Montage services, run the installer. The Command Prompt window will stay open while the migration and maintenance occurs. Do not kill the upgrade process once started, it may take significant time. Contact Montage Support if you are concerned it is stalled (the install.log file in the installation directory contains additional details). Once complete, start the services as normal.

Run Windows Disk De-fragmentation on any disks that have high fragmentation levels to complete the maintenance tasks.

If upgrading from a release prior to 2.5, you can directly upgrade to 3.0, but be sure to read the notes and extra steps in the intermediate Changelog entries, e.g. the 2.5 Upgrade.

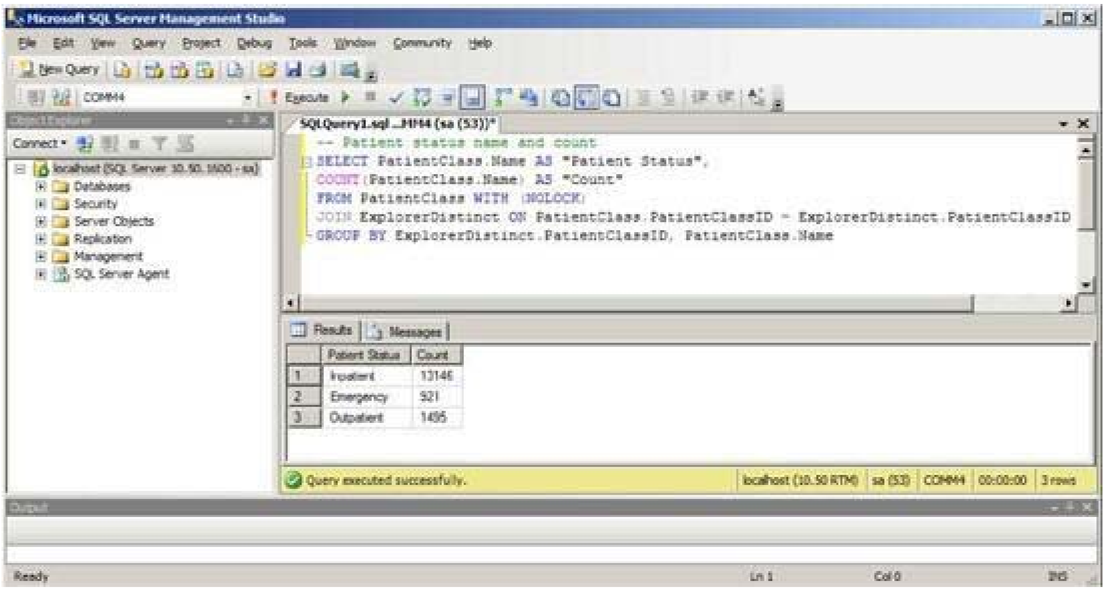
This section contains items to check prior to installation and post installation for the Nuance PowerScribe 360 | Reporting implementations.

NOTE *You need access to https://stats.montagehealthcare.com/upload.*

PS360 COMM4 DB Analysis

The following queries must be run against the PS360 COMM4 database and the results provided to the project manager. The PM will then use this information and assist the Client in determining how the DB Crawler should be configured.

The SQL query below should be executed in Microsoft SQL Server Management Studio, and the results given to the PM.


Microsoft SQL Server Management Studio
File Edit View Query Project Debug Tools Window Community Help
New Query
COMM4
Execute
Object Explorer
Connect
localhost (SQL Server 10.50.1600 - sa)
Databases
Security
Server Objects
Replication
Management
SQL Server Agent
SQLQuery1.sql ...MM4 (sa (53))*
Results
Messages
Output
Ready
Ln 1
Col 0
INS

```
-- Patient status name and count
SELECT PatientClass.Name AS "Patient Status",
COUNT(PatientClass.Name) AS "Count"
FROM PatientClass WITH (NOLOCK)
JOIN ExplorerDistinct ON PatientClass.PatientClassID = ExplorerDistinct.PatientClassID
GROUP BY ExplorerDistinct.PatientClassID, PatientClass.Name
```

	Patient Status	Count
1	Inpatient	13146
2	Emergency	921
3	Outpatient	1495

Query executed successfully. | localhost (10.50 RTM) | sa (53) | COMM4 | 00:00:00 | 3 rows

If necessary, you can run the individual queries located under the explanations of their purpose, individually.

Consolidated Query

Before running this query, set SQL management Studio to send the output to a file.

```
use comm4
go
print 'Site Vs SiteLocation'

SELECT Name AS "Site" FROM Site WITH (NOLOCK);
SELECT Name AS "Site Locations" FROM SiteLocation WITH (NOLOCK);

print 'Patient Status, Name and Count'

SELECT PatientClass.Name AS "Patient Status",
       COUNT(PatientClass.Name) AS "Count"
FROM PatientClass WITH (NOLOCK)
JOIN ExplorerDistinct ON PatientClass.PatientClassID =
ExplorerDistinct.PatientClassID
GROUP BY ExplorerDistinct.PatientClassID, PatientClass.Name



print'Available modalities'

SELECT COUNT(Name) AS "Order Count",
       Name AS "Modality Name"
FROM ProcedureModality WITH (NOLOCK)
JOIN OrderProcedure
WITH (NOLOCK) ON OrderProcedure.ProcedureCodeID =
ProcedureModality.ProcedureCodeID
GROUP BY ProcedureModality.Name
ORDER BY ProcedureModality.Name


print 'Modality to Exam Mappings'

SELECT ProcedureModality.Name AS "Modality",
       Explorer.Procedures AS "Exam Code",
       ProcedureDesc AS "Exam Description"
FROM Explorer
JOIN OrderProcedure ON OrderProcedure.OrderID = Explorer.OrderID
JOIN ProcedureModality ON ProcedureModality.ProcedureCodeID =
OrderProcedure.ProcedureCodeID
WHERE Procedures IS NOT NULL AND ProcedureDesc IS NOT NULL
GROUP BY ProcedureModality.Name, Explorer.Procedures,
Explorer.ProcedureDesc




print'All ordering and reporting providers'

SELECT PersonalInfo.LastName AS "Last Name",
       PersonalInfo.FirstName AS "First Name"
FROM "Order" WITH (NOLOCK)
JOIN Physician WITH (NOLOCK) ON Physician.PhysicianID =
"Order".ProviderPhysID
```

```
JOIN PersonalInfo WITH (NOLOCK) ON PersonalInfo.PersonalInfoID =
Physician.PersonalInfoID
WHERE "Order".ProviderPhysID IS NOT NULL
GROUP BY PersonalInfo.LastName, PersonalInfo.FirstName
ORDER BY PersonalInfo.LastName

SELECT SignerLastName AS "Last Name",
       SignerFirstName AS "First Name"
FROM ExplorerDistinct WITH (NOLOCK)
WHERE SignerLastName IS NOT NULL
GROUP BY SignerLastName, SignerFirstName
ORDER BY SignerLastName




print'Possible duplicate ordering providers'

SELECT COUNT(DISTINCT "Order".ProviderPhysID) - 1 AS "Possible
Duplicates",
       PersonalInfo.LastName AS "Last Name",
       PersonalInfo.FirstName AS "First Name"
FROM "Order" WITH (NOLOCK)
JOIN Physician WITH (NOLOCK) ON Physician.PhysicianID =
"Order".ProviderPhysID
JOIN PersonalInfo WITH (NOLOCK) ON PersonalInfo.PersonalInfoID =
Physician.PersonalInfoID
WHERE "Order".ProviderPhysID IS NOT NULL
GROUP BY PersonalInfo.LastName, PersonalInfo.FirstName
HAVING COUNT(DISTINCT "Order".ProviderPhysID) > 1
ORDER BY PersonalInfo.LastName



print'Possible duplicate reporting providers'

SELECT COUNT(DISTINCT SignerAcctID) - 1 AS "Possible Duplicates",
       SignerLastName AS "Last Name",
       SignerFirstName AS "First Name"
FROM ExplorerDistinct WITH (NOLOCK)
GROUP BY SignerLastName, SignerFirstName
HAVING COUNT(DISTINCT SignerAcctID) > 1
ORDER BY SignerLastName
```

Query Explanations and Individual Queries

Listing Sites and SiteLocations

In some cases **SiteLocation** may be preferred over **Site** as described in *Site Vs SiteLocation*. The below query will assist in providing a list from both the **Site** and **SiteLocation** to simplify the decision making process.

```
-- Site Vs SiteLocation

SELECT Name AS 'Site" FROM Site WITH (NOLOCK);

SELECT Name AS "Site Locations" FROM SiteLocation WITH (NOLOCK);
```

Patient Status

Montage will need to be configured to map unrecognized patient statuses, if any exist. Please reference Patient Class for more information. The following query will assist in this decision making processes by listing all the patient statuses that have at least one reference in a report followed by the number of times that the status appears in all reports.

```
-- Patient status name and count

SELECT PatientClass.Name AS 'Patient Status,"

         COUNT(PatientClass.Name) AS "Count"
  FROM PatientClass WITH (NOLOCK)
  JOIN ExplorerDistinct ON PatientClass.PatientClassID =
  ExplorerDistinct.PatientClassID
GROUP BY ExplorerDistinct.PatientClassID, PatientClass.Name
```

Patient Status	Count
Clinic	2000
Discharged	45
Emergency	999
Inpatient	4001

In the above SQL Results, we find that there two unrecognized patient statuses that need to have a mapping defined for them.

List Modalities

The following query can be used to identify modalities that are less common and may need to be clarified by the customer.

```
 -- Available modalities
 SELECT COUNT(Name) AS "Order Count",
        Name AS "Modality Name"
 FROM ProcedureModality WITH (NOLOCK)
 JOIN OrderProcedure
 WITH (NOLOCK) ON OrderProcedure.ProcedureCodeID =
 ProcedureModality.ProcedureCodeID
 GROUP BY ProcedureModality.Name
ORDER BY ProcedureModality.Name
```

The above query will return a list of the modalities which are recognized by this customer’s PS360 installation. At the customer’s discretion, its possible to map unwanted, legacy, or duplicate modalities to another more common modality such as CR, CT, MR, US, XA, DF, NM, PT, and MG.

In the below SQL results, modalities CT and US are commonly recognized modalities and are according to Order Count are used more frequently at this customer site. However, US-procedure and US-duplex can be considered duplicates of the more common US. Since US appears far more frequently, it might make sense to consolidate the other modalities into UT.

Order Count	Modality
1000	CT
1050	US
39	US - Duplex
60	US - Procedure

In this next example, MR and MRI both exist as modalities, but its likely that they can be merged into a single modality. Since MR appears more frequently, it might be safe to assume MRI can be mapped to MR. The same situation exists for CTA and Angiography, which in many cases could simply be reduced to CT.

Order Count	Modality
40	Angiography
3000	CT
500	CTA
2040	MR
1000	MRI

Modality to Exam Mappings

For assistance with determining if the existing mappings from “Exam Code” to “Modality” are correct, use the following query.

```
SELECT ProcedureModality.Name AS "Modality",
       Explorer.Procedures AS "Exam Code",
       ProcedureDesc AS "Exam Description"
FROM Explorer
JOIN OrderProcedure ON OrderProcedure.OrderID = Explorer.OrderID
JOIN ProcedureModality ON ProcedureModality.ProcedureCodeID =
OrderProcedure.ProcedureCodeID
WHERE Procedures IS NOT NULL AND ProcedureDesc IS NOT NULL
GROUP       BY       ProcedureModality.Name,       Explorer.Procedures,
Explorer.ProcedureDesc
```

Duplicate Providers

For both ordering and reporting providers, we want to identify records that are potential duplicates. Since its plausible that two or more providers have the same name, its still necessary to work with the customer to verify the possible redundancy. If a determination is made that the provider has a duplicate entry, it may be necessary to work with Montage Support to clean the data.

The following query will list all ordering and reporting providers.

```
-- All ordering and reporting providers
 SELECT PersonalInfo.LastName AS "Last Name",
        PersonalInfo.FirstName AS "First Name"
 FROM "Order" WITH (NOLOCK)
 JOIN Physician WITH (NOLOCK) ON Physician.PhysicianID =
 "Order".ProviderPhysID
 JOIN PersonalInfo WITH (NOLOCK) ON PersonalInfo.PersonalInfoID =
 Physician.PersonalInfoID
 WHERE "Order".ProviderPhysID IS NOT NULL
 GROUP BY PersonalInfo.LastName, PersonalInfo.FirstName
 ORDER BY PersonalInfo.LastName

 SELECT SignerLastName AS "Last Name",
SignerFirstName AS "First Name"
FROM ExplorerDistinct WITH (NOLOCK)
WHERE SignerLastName IS NOT NULL
GROUP BY SignerLastName, SignerFirstName
ORDER BY SignerLastName
```

Duplicate Ordering Providers

The following query will list the number of possible duplications for each ordering provider.

```
 -- Possible duplicate ordering providers
 SELECT COUNT(DISTINCT "Order".ProviderPhysID) - 1 AS "Possible
 Duplicates",
        PersonalInfo.LastName AS "Last Name",
        PersonalInfo.FirstName AS "First Name"
 FROM "Order" WITH (NOLOCK)
 JOIN Physician WITH (NOLOCK) ON Physician.PhysicianID =
 "Order".ProviderPhysID
 JOIN PersonalInfo WITH (NOLOCK) ON PersonalInfo.PersonalInfoID =
 Physician.PersonalInfoID
 WHERE "Order".ProviderPhysID IS NOT NULL
 GROUP BY PersonalInfo.LastName, PersonalInfo.FirstName
 HAVING COUNT(DISTINCT "Order".ProviderPhysID) > 1
ORDER BY PersonalInfo.LastName
```

Possible Duplicates	Last Name	First Name
1	Smith	John
1	Tudor	Henry
4	White	Jessica

The above results tell us that there are 2 ordering providers with a duplicate record and another with 4 duplicate records.

Duplicate Reporting Providers

The following query will list the number of possible duplications for each reporting provider referenced from in a report.

```
 -- Possible duplicate reporting providers
 SELECT COUNT(DISTINCT SignerAcctID) - 1 AS "Possible Duplicates",
        SignerLastName AS "Last Name",
        SignerFirstName AS "First Name"
 FROM ExplorerDistinct WITH (NOLOCK)
 GROUP BY SignerLastName, SignerFirstName
 HAVING COUNT(DISTINCT SignerAcctID) > 1
ORDER BY SignerLastNam
```

Identify the Primary Active Accounts in PowerScribe

The following script is a data analysis script to identify the primary active accounts in PowerScribe:

```
Select a.AccountID, a.LoginName,
IsNull(api.FirstName, '') 'FirstName',
IsNull(api.LastName, '') 'LastName',
Case When a.IsAdmin = 0 Then 'No' When a.IsAdmin = 1 Then 'Yes' End As'Admin',
Case When a.IsActive = 0 Then 'No' When a.IsActive = 1 Then 'Yes' End As 'Active',
IsNull(r.Name, '') 'Role',
IsNull(s.Name, '') 'Site',
IsNull(sa.Identifier, '') 'RIS_ID' From Comm4..Account A (Nolock)
Left Outer Join Comm4..SiteAccount sa (Nolock) On a.AccountID = sa.AccountID
Left Outer Join Comm4..Role r (Nolock) On sa.RoleID = r.RoleID
Left Outer Join Comm4..Site s (Nolock) On s.SiteID = sa.SiteID
Left Outer Join Comm4..AccountPersonalInfo api (Nolock) On api .AccountID =
a.AccountID
And a.AccountID != 1
```

Application Installation

The client should provide the installing engineer a fully installed and configured WINDOWS server, which follows the guidelines in PN 889675, PowerScribe® 360 | Reporting Windows Server 2008 Installation and Configuration Manual, and PN 889676, PowerScribe® 360 | Reporting Windows Server 2012 Installation and Configuration Manual.

Do not use the Nuance SQL user account to configure the Montage Crawler. Before installing or upgrading Montage, a Microsoft SQL account on the system database server with access to the COMM4 database is required to access the Montage Crawler.

Prior to any installation, the FE must obtain the License files from the assigned Nuance PM for the project.

Always install the latest Nuance approved version of Montage software.

Download Software

Download the Montage software only from the DML. DO NOT download software from the Montage support site.

Windows Firewall

Clients must be able to access montage via the standard HTTP port 80 (and port 443 if using HTTPS). The customer’s network must have any firewalls set to allow this. Additionally, set Window’s Firewall to allow Inbound traffic to Apache via port 80 (and if needed 443). This can be done under Control Panel -+ Check firewall status -+ Advanced settings.

Dependencies

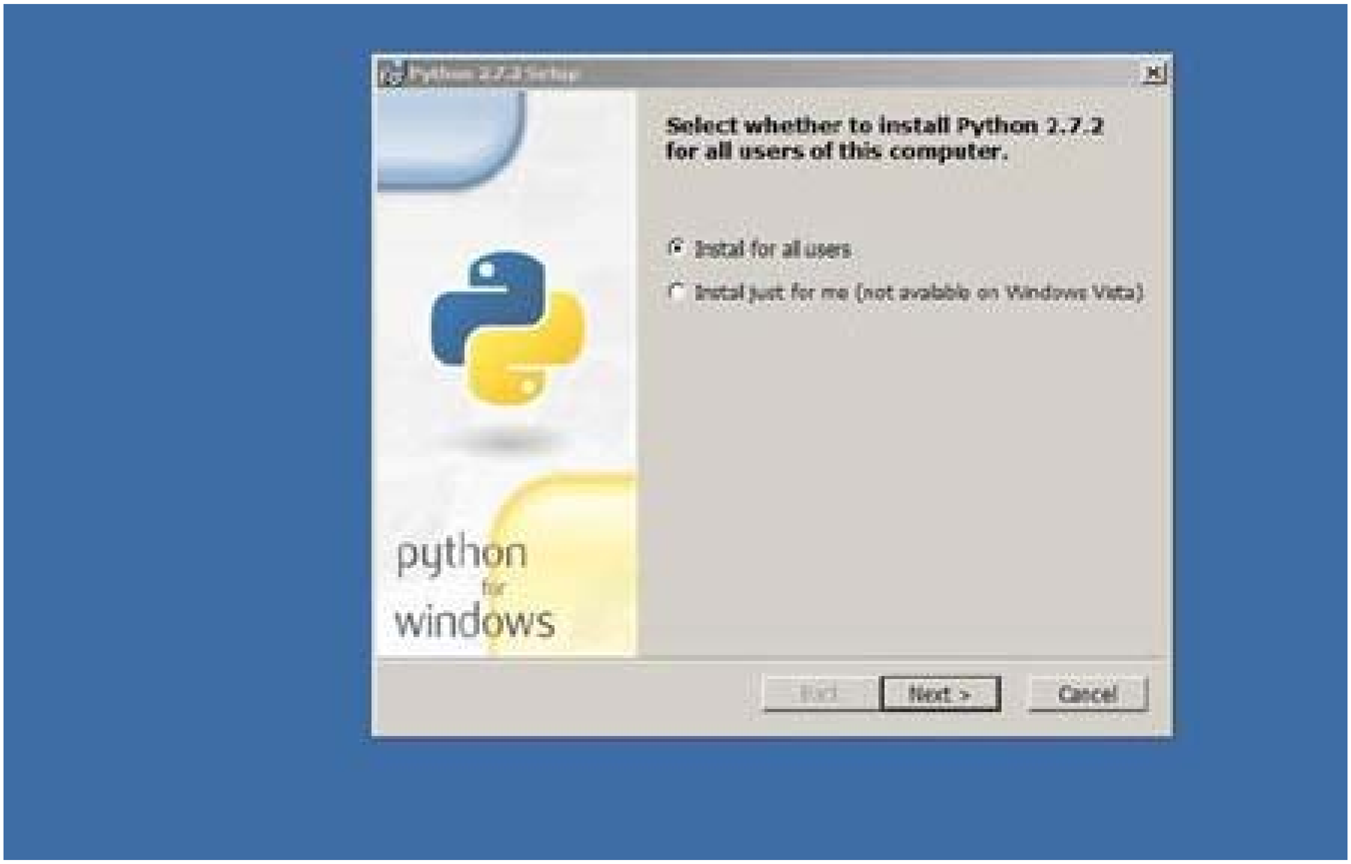
- Python
- PostgreSQL
- RabbitMQ
- Apache HTTPD
- Next Steps

Python

Montage is mostly written in the Python programming language. Similar to .NET applications, you must install the Python 2.7 runtime.

Run the installer, **python-2.7.2.msi**, accepting the defaults.

Select **Install for all users**, and click **Next**.



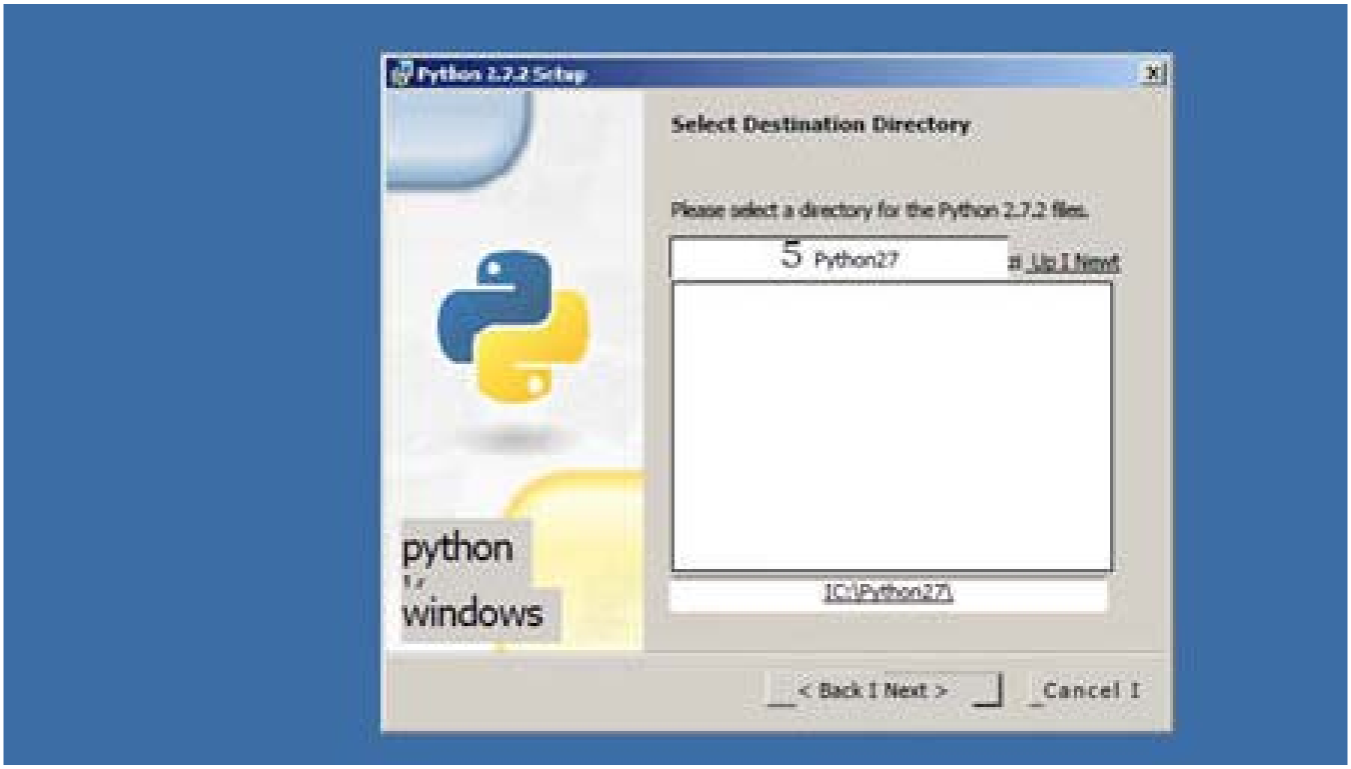
Select whether to install Python 2.7.2 for all users of this computer.

● Instal for all users

○ Instal just for me (not avalable on Windows Vista)

Install into C:\Python27, and click **Next.**

Warning: Due to how Montage is currently built, Python must be installed at C:\Python27.



Python 2.7.2 Setup

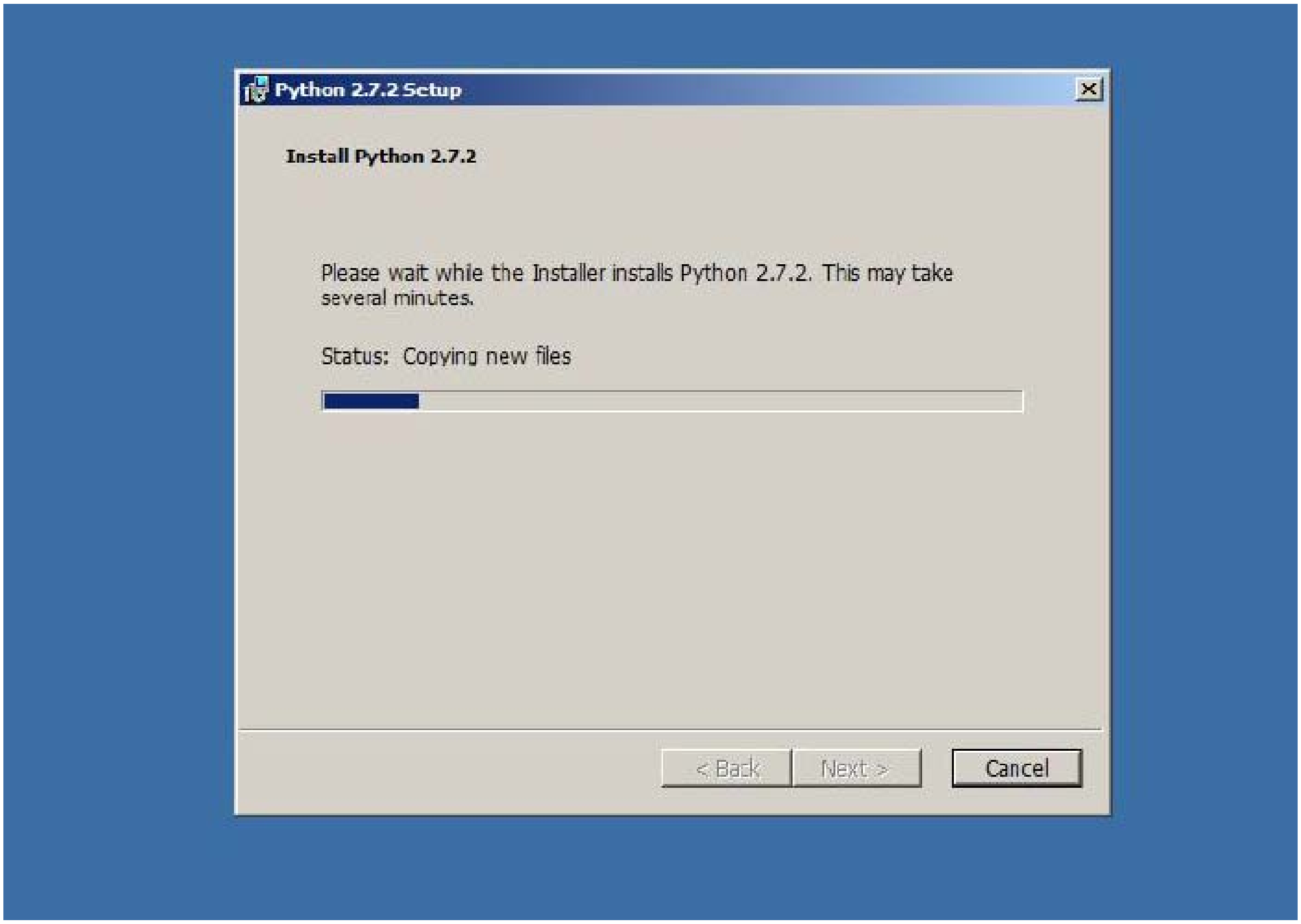
Select Destination Directory

Please select a directory for the Python 2.7.2 files.

Python27

C:\Python27\

Montage uses the default selection of Python features, click **Next**.



Python 2.7.2 Setup

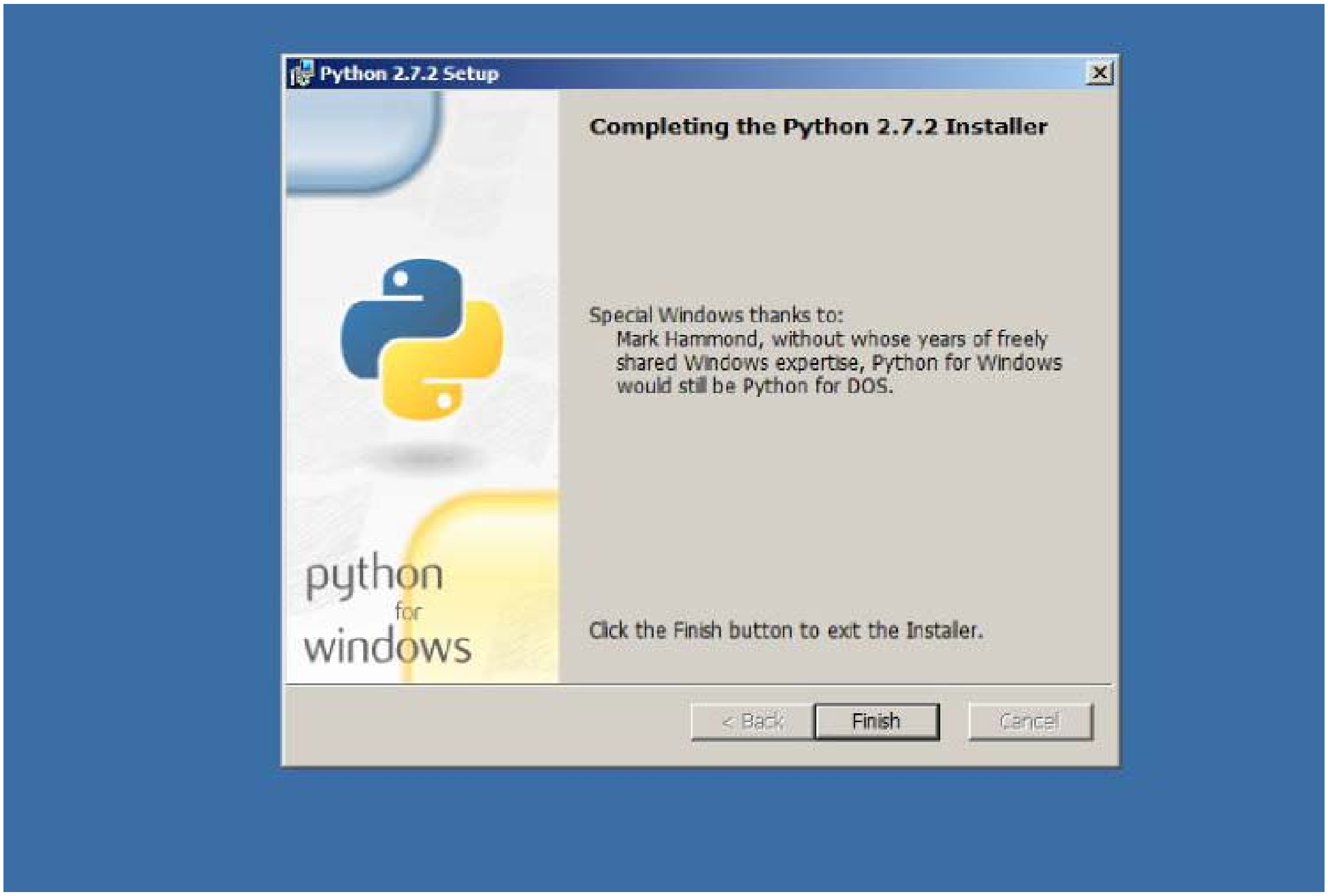
Install Python 2.7.2

Please wait while the Installer installs Python 2.7.2. This may take several minutes.

Status: Copying new files

Python installs.

When the installation is finished, click **Finish**.



Completing the Python 2.7.2 Installer

Special Windows thanks to:
Mark Hammond, without whose years of freely shared Windows expertise, Python for Windows would still be Python for DOS.

Click the Finish button to exit the Installer.

Note: Prior to Montage 2.4, several Python libraries had to be installed. As of Montage 2.4, these are now included as part of the montage-VERSION.exe installer.

If previously installed, you can safely remove these libraries under the Control Panel > Programs > Uninstall Program. Only remove:

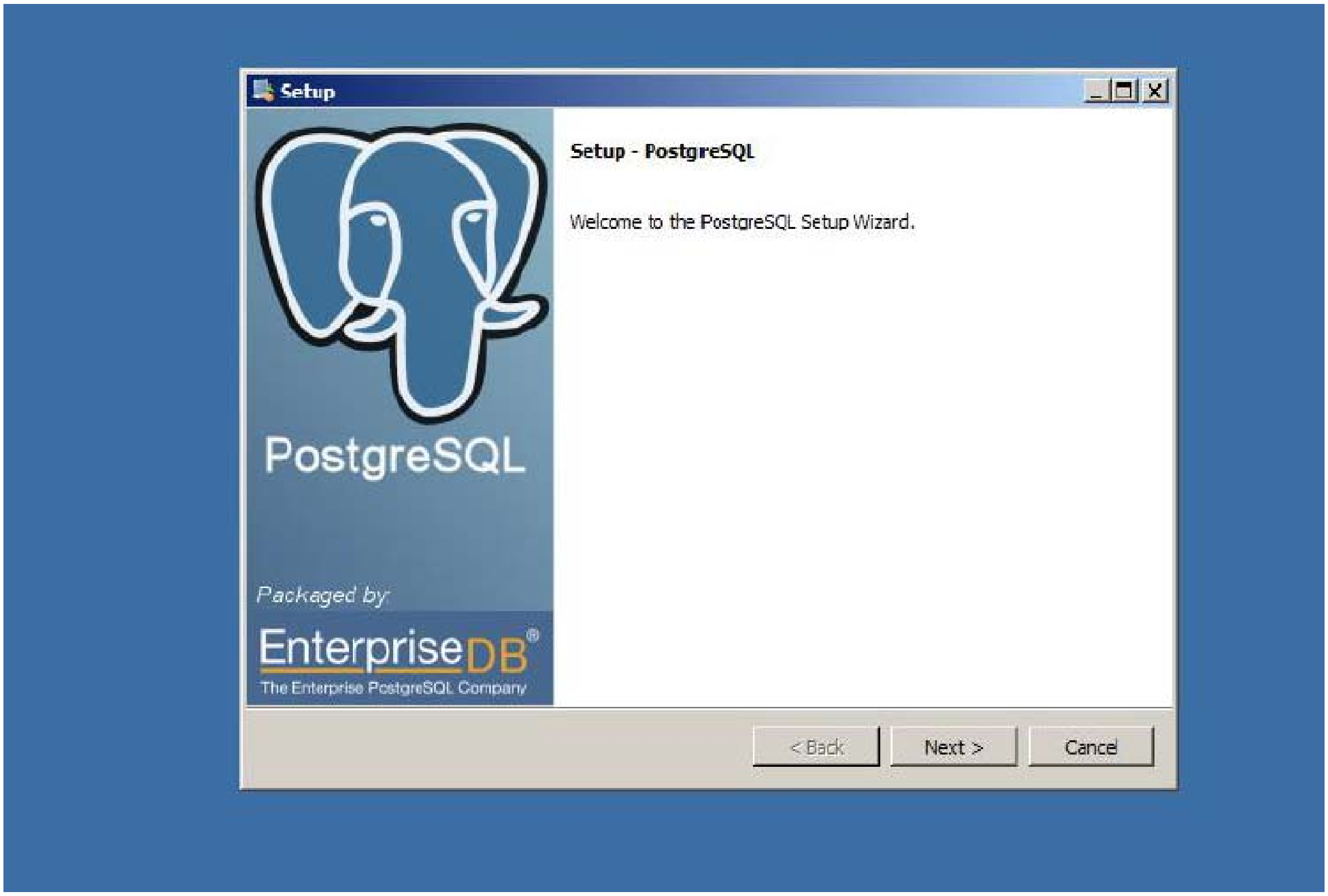
- “Python 2.7 lxml-2.3.1”
- “Python 2.7 psycopg2-2.4”
- “Python 2.7 pyodbc-2.1.11”
- “Python 2.7 python-ldap-2.3.13”
- “Python 2.7 pywin32-217”

Do not remove “Python 2.7.x”.

PostgreSQL

Run the *PostgreSQL* installer, postgresql-9.1.9-1-windows.exe.

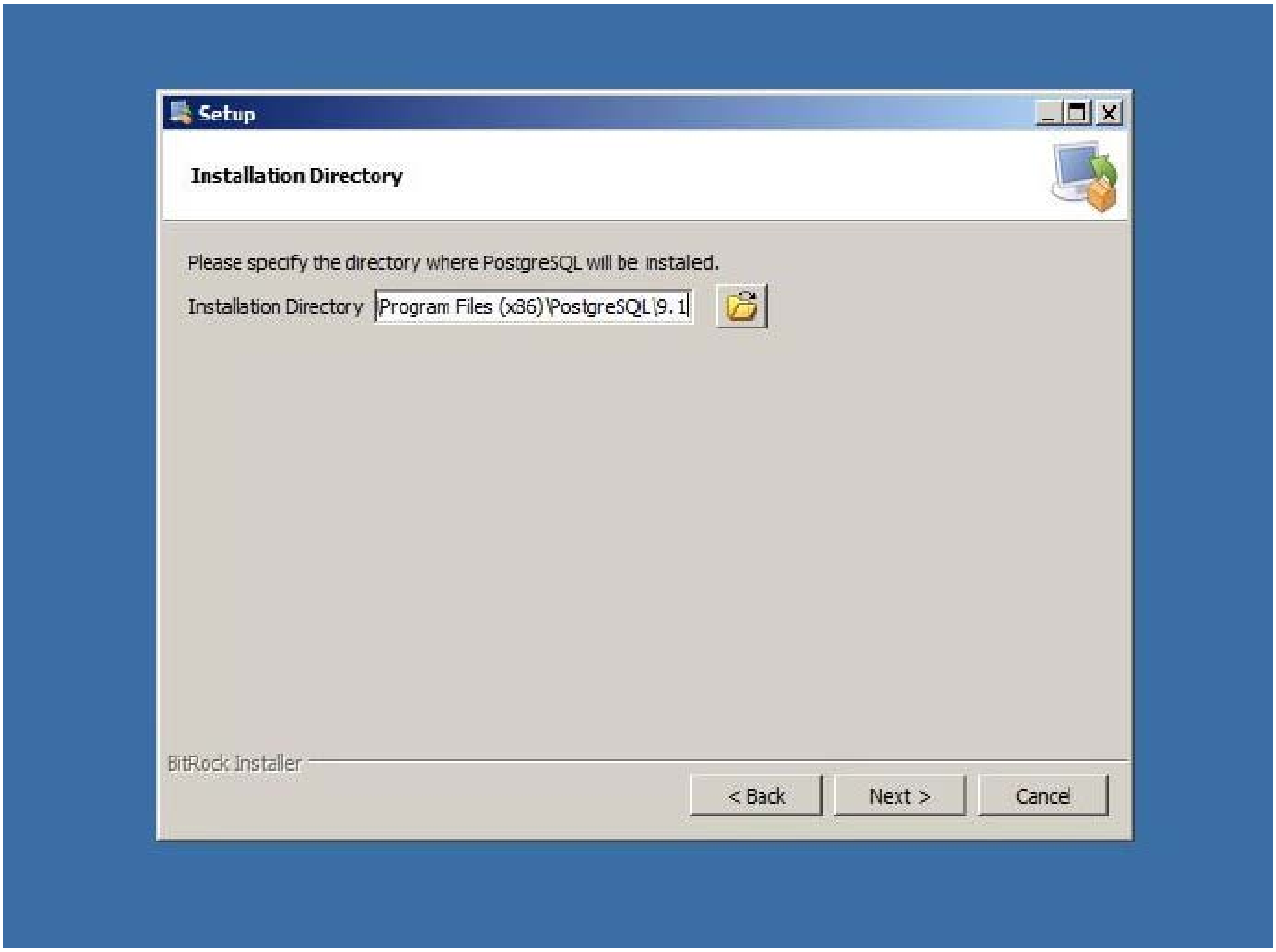
Click **Next** to start:



Setup - PostgreSQL

Welcome to the PostgreSQL Setup Wizard.

You can install PostgreSQL anywhere, the default is typically fine.



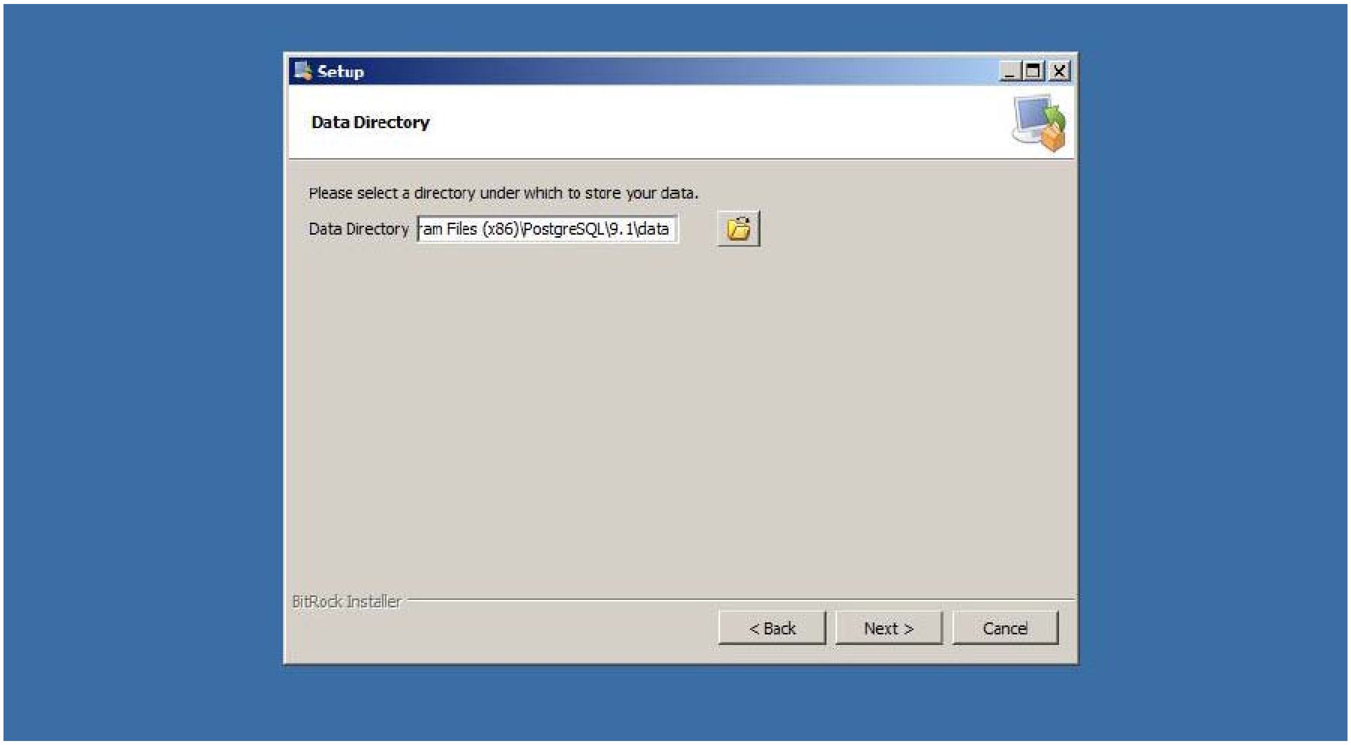
Setup

Installation Directory

Please specify the directory where PostgreSQL will be installed.

Installation Directory: Program Files (x86)\PostgreSQL\9.1

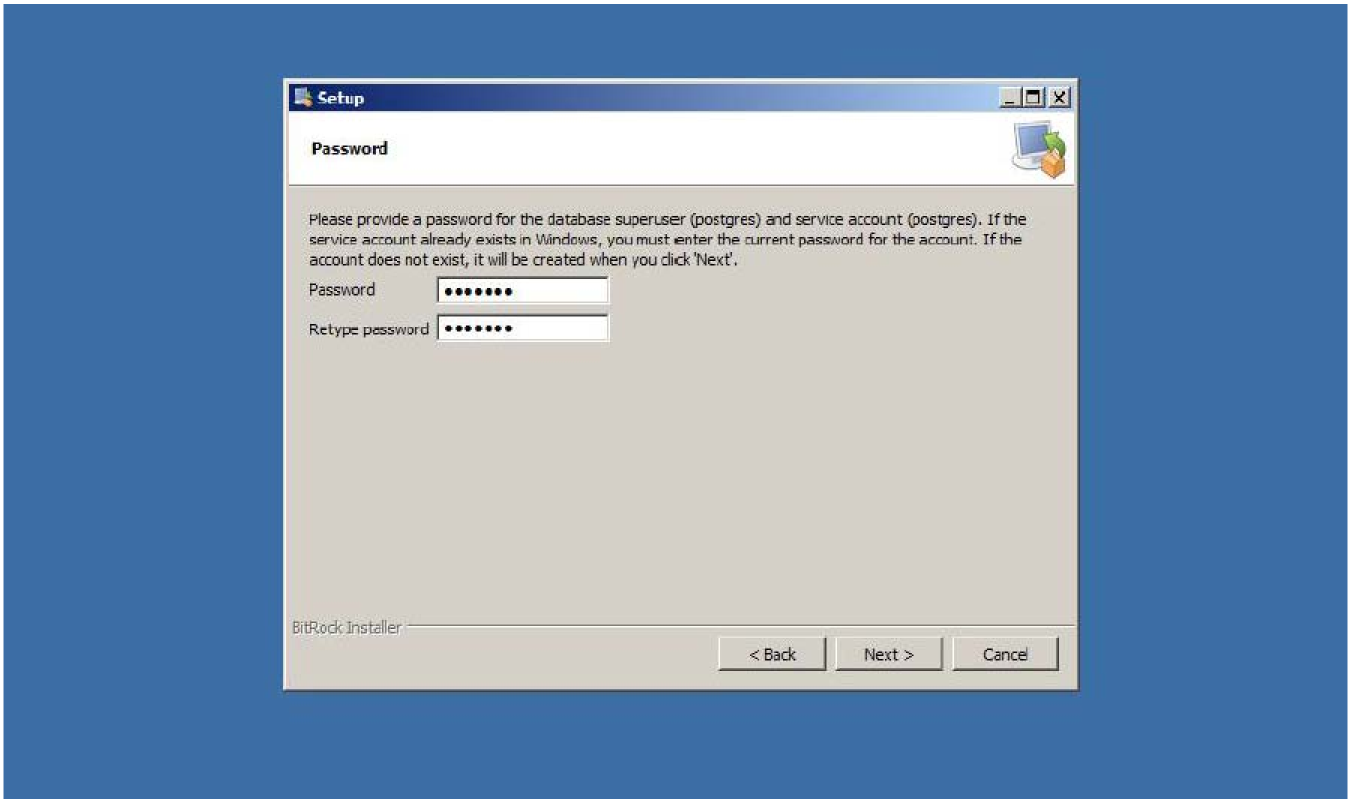
You can additionally place the PostgreSQL data files (the primary consumer of space), anywhere, such as on another drive. However, the default is acceptable.



Please select a directory under which to store your data.

Data Directory ram Files (x86)\PostgreSQL\9.1\data

Set the Account name and password as instructed in P36A064.

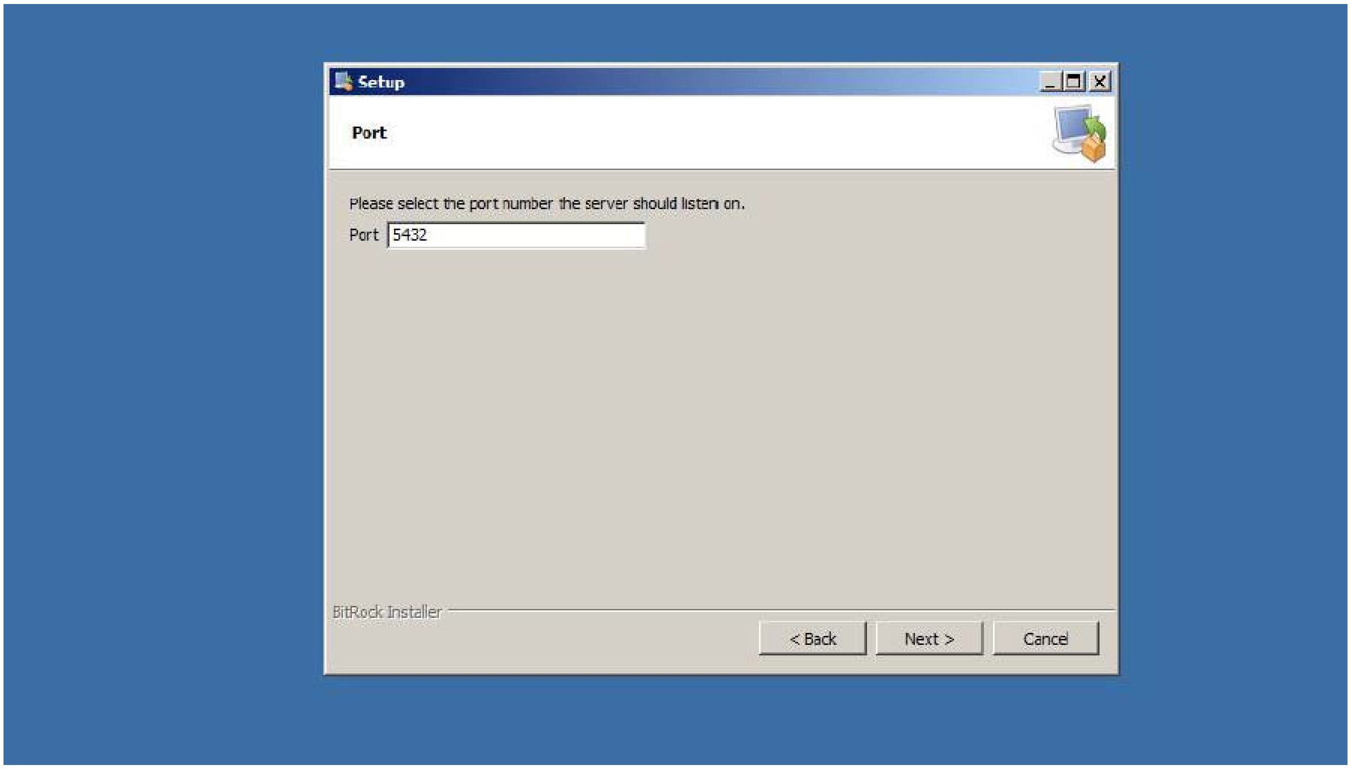


Please provide a password for the database superuser (postgres) and service account (postgres). If the service account already exists in Windows, you must enter the current password for the account. If the account does not exist, it will be created when you click 'Next'.

Password •••••••

Retype password •••••••

Use the default port 5432 (otherwise, Montage must be configured to point to non-default port):

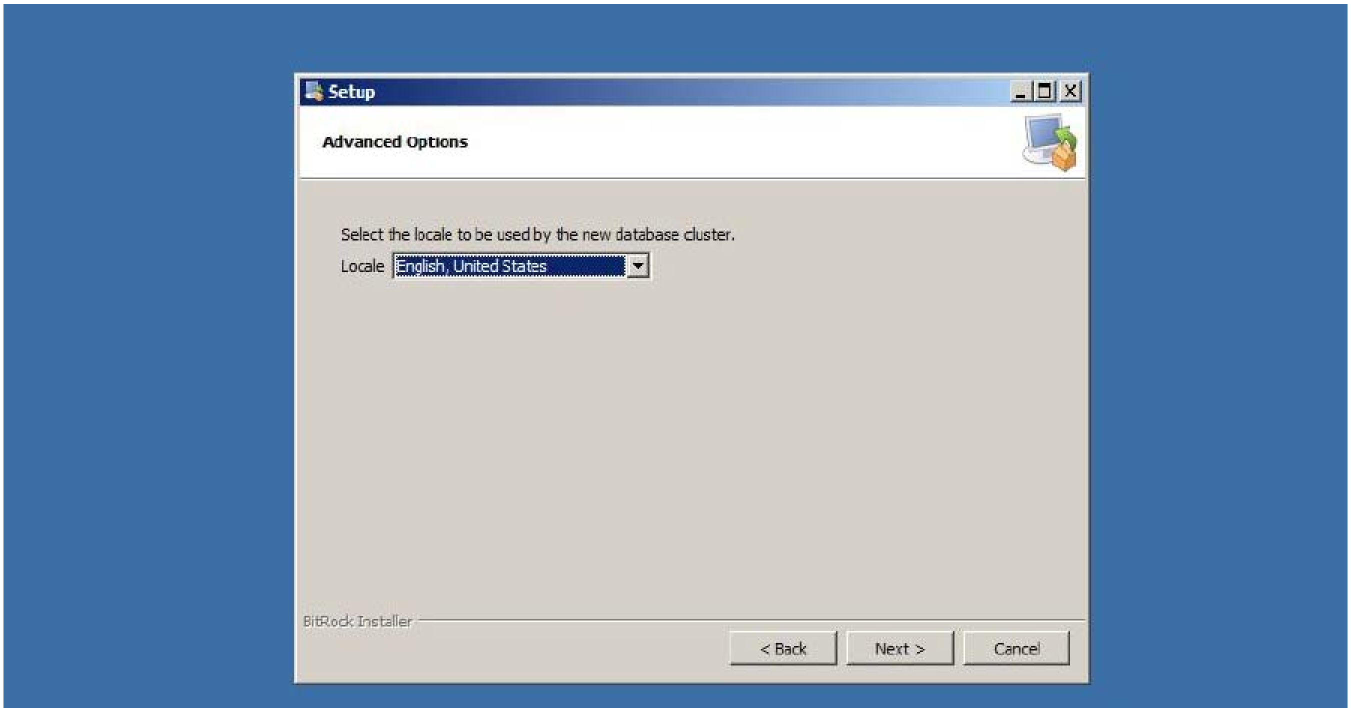


Port

Please select the port number the server should listen on.

Port 5432

Set the locale to *English, United States*:

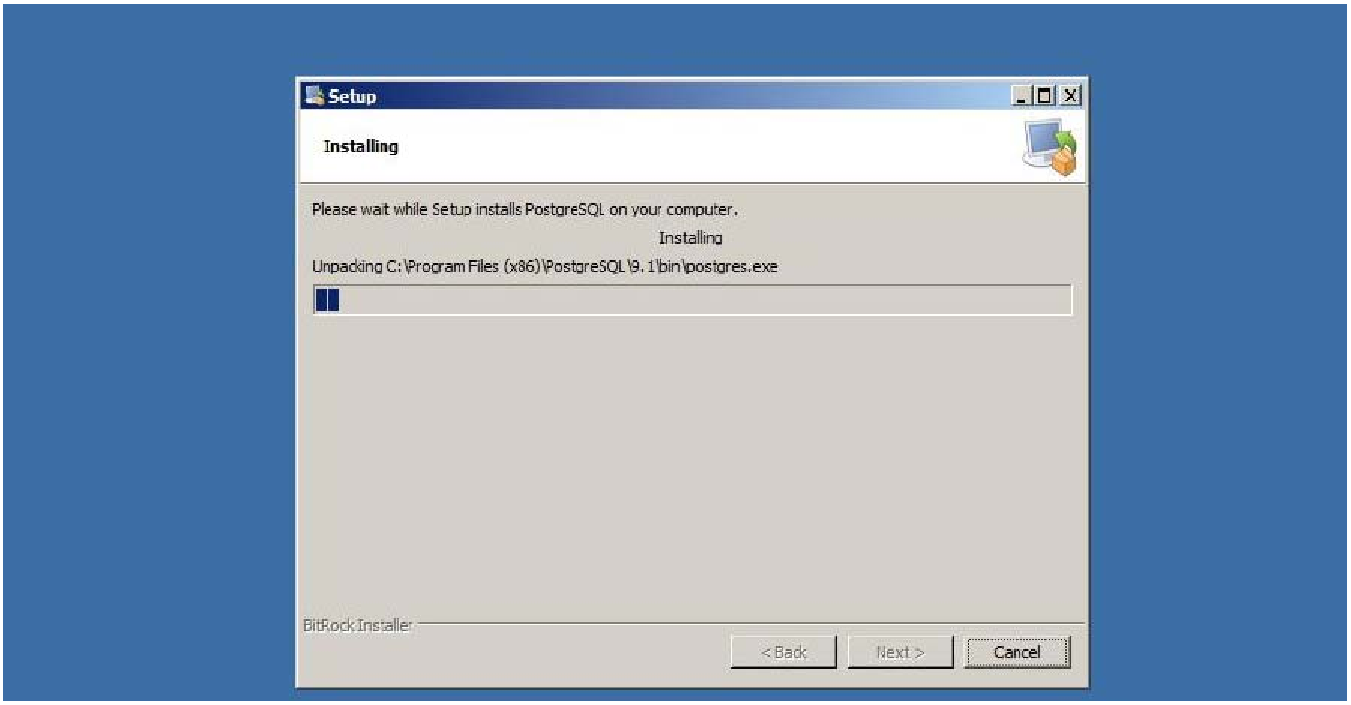


Advanced Options

Select the locale to be used by the new database cluster.

Locale English, United States

Now ready to install, click **Next**.



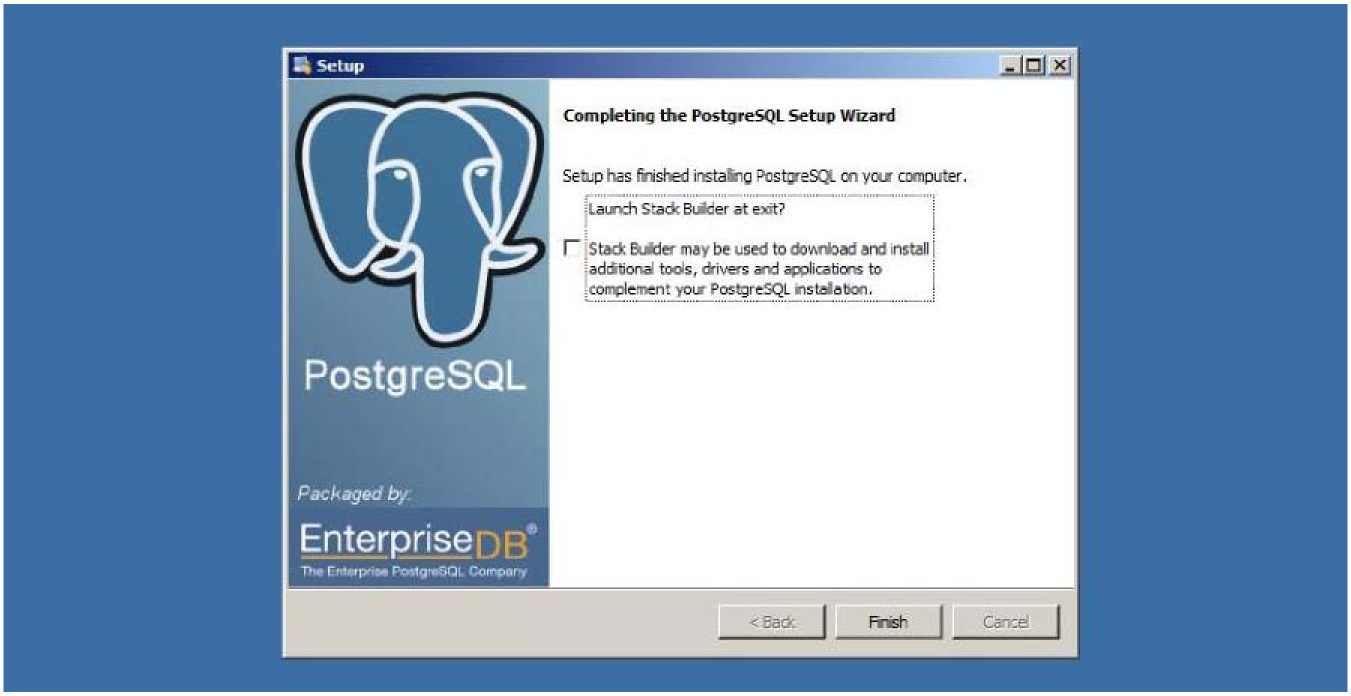
Please wait while Setup installs PostgreSQL on your computer.

Installing

Unpacking C:\Program Files (x86)\PostgreSQL\9.1\bin\postgres.exe

Uncheck **Stack Builder.....**, it does not add anything Montage requires.

Click **Finish** to exit the installer.



Completing the PostgreSQL Setup Wizard

Setup has finished installing PostgreSQL on your computer.

□ Launch Stack Builder at exit?

Stack Builder may be used to download and install additional tools, drivers and applications to complement your PostgreSQL installation.

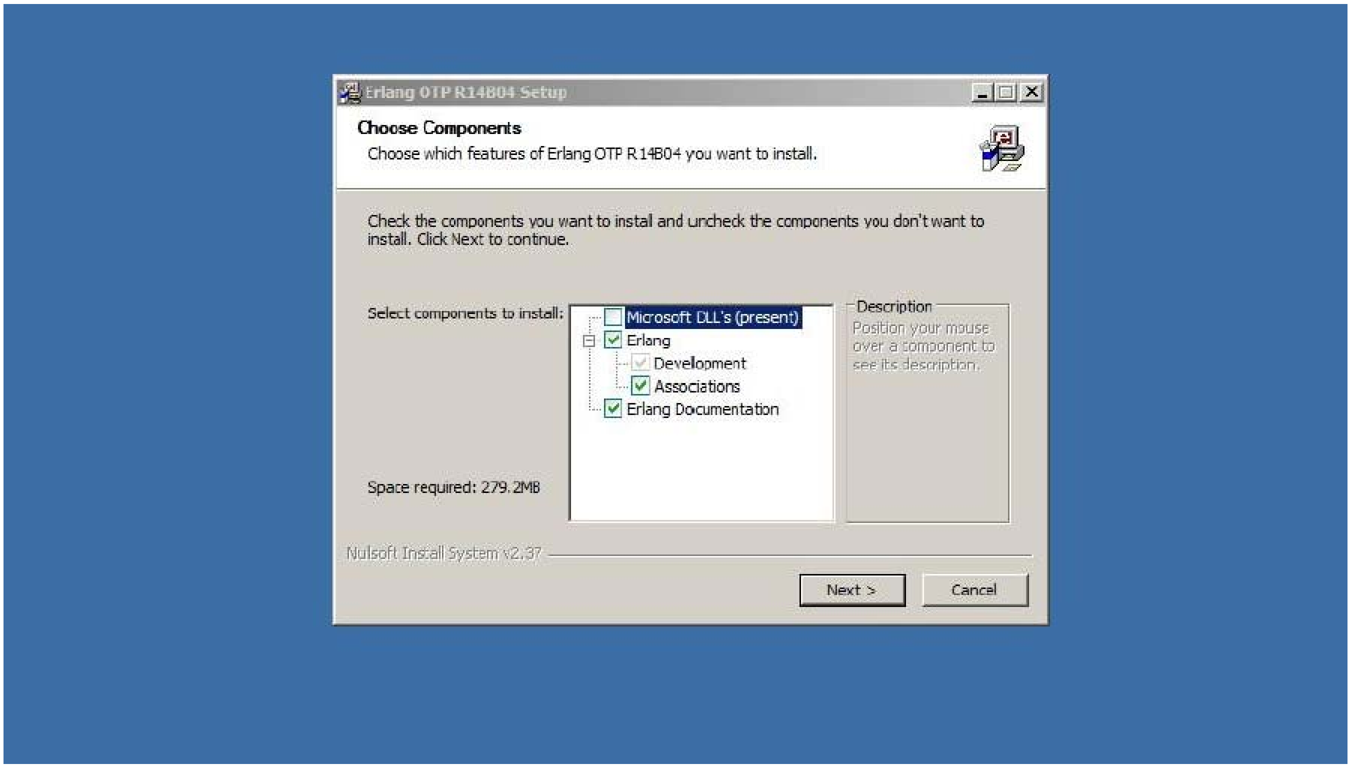
Continue to install **RabbitMQ**.

RabbitMQ

To install *RabbitMQ*, first install Erlang that is the runtime that RabbitMQ uses, by running **otp_win32_R14B04.exe**.

The default component selections are fine.

Click **Next**.



Choose Components

Choose which features of Erlang OTP R14B04 you want to install.

Check the components you want to install and uncheck the components you don't want to install. Click Next to continue.

Select components to install:

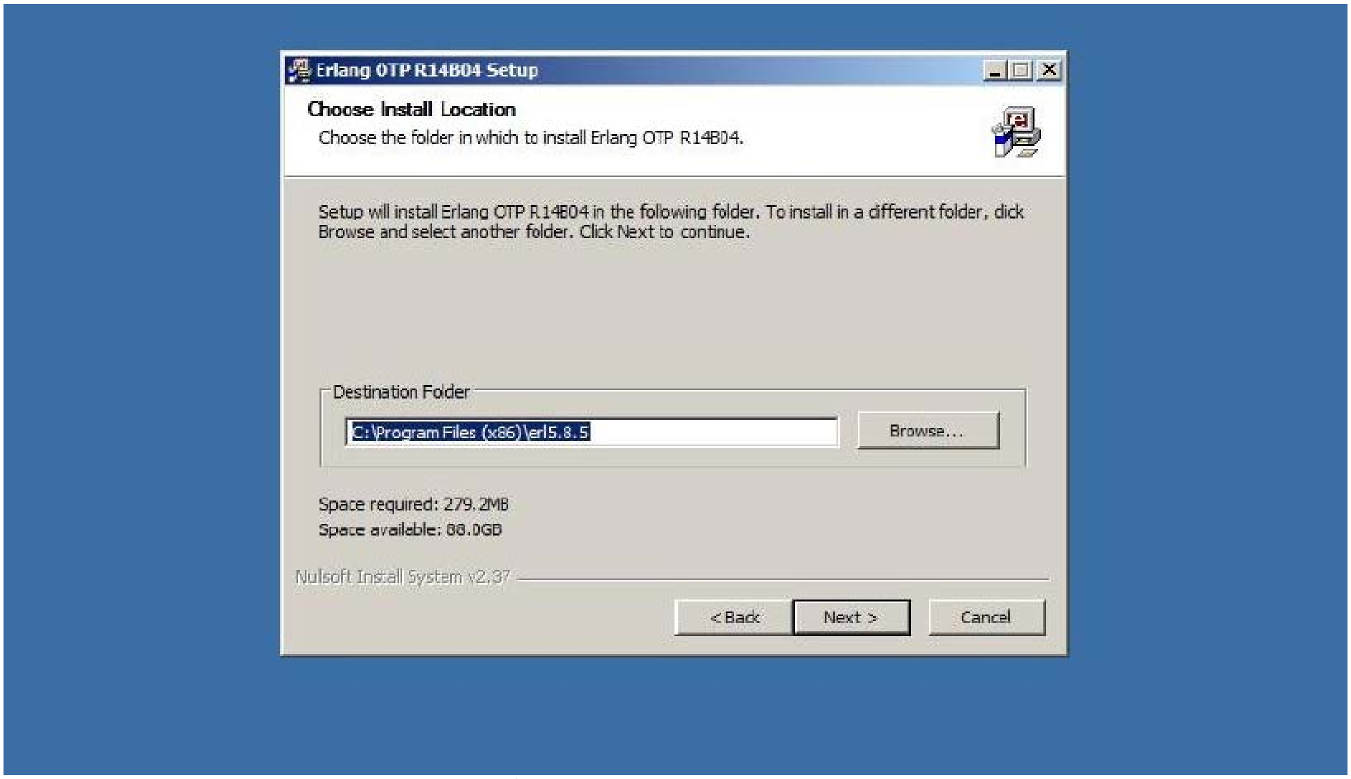
- □ Microsoft DLL's (present)
- ☑ Erlang
  - ☑ Development
  - ☑ Associations
- ☑ Erlang Documentation

Description

Position your mouse over a component to see its description.

Space required: 279.2MB

The default location is fine.



Erlang OTP R14B04 Setup

Choose Install Location

Choose the folder in which to install Erlang OTP R14B04.

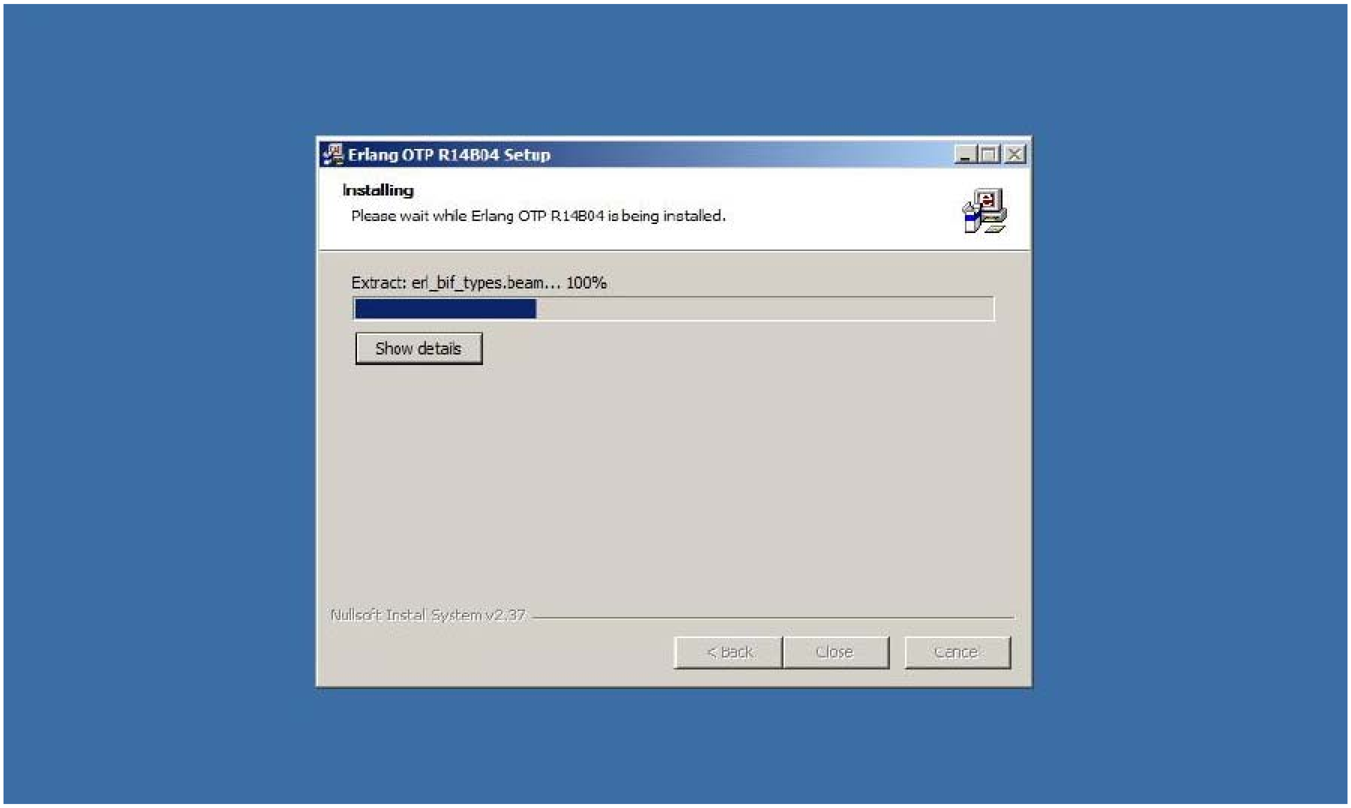
Setup will install Erlang OTP R14B04 in the following folder. To install in a different folder, click Browse and select another folder. Click Next to continue.

Destination Folder: C:\Program Files (x86)\erl5.8.5

Space required: 279.2MB
Space available: 88.0GB

The location of the icons is not important, click **Next**.

The installer will run for several minutes.



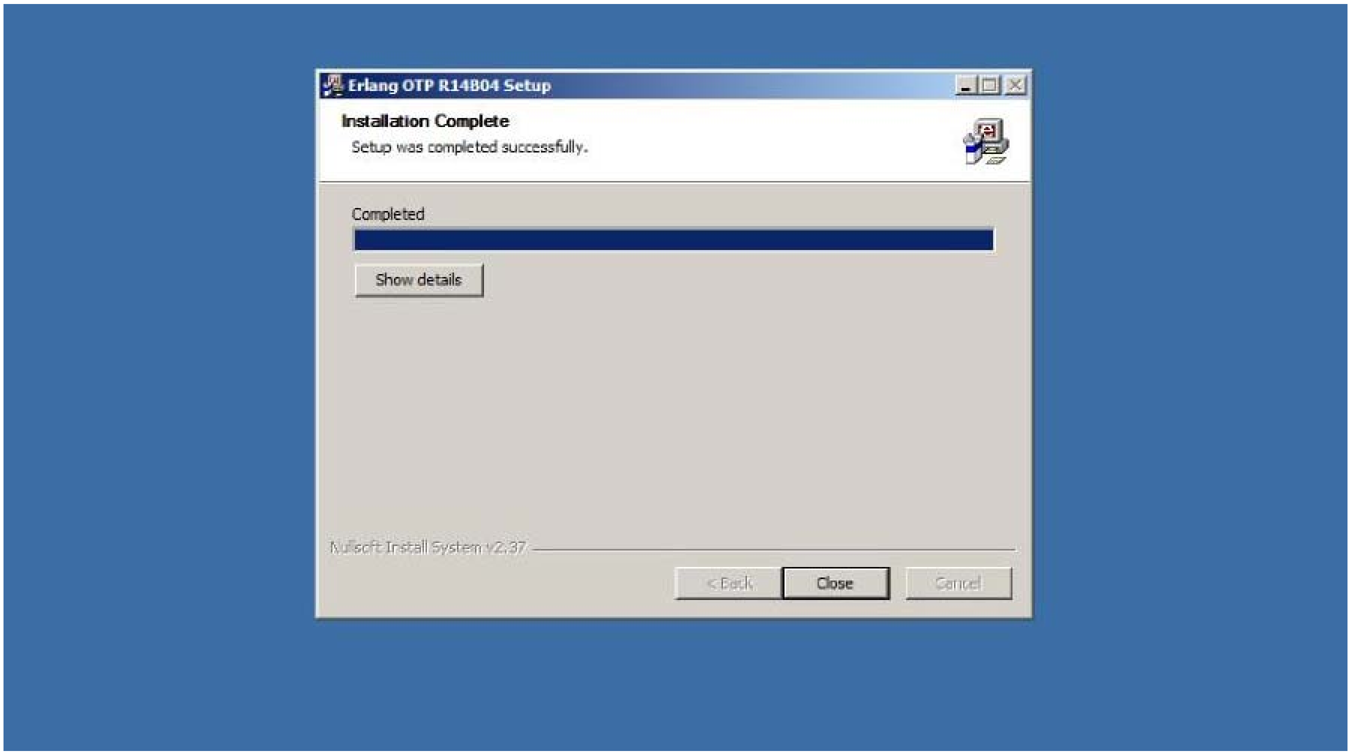
Erlang OTP R14B04 Setup

Installing

Please wait while Erlang OTP R14B04 is being installed.

Extract: erl_bif_types.beam... 100%

When the installation completes, click **Finish**.



Erlang OTP R14B04 Setup

Installation Complete

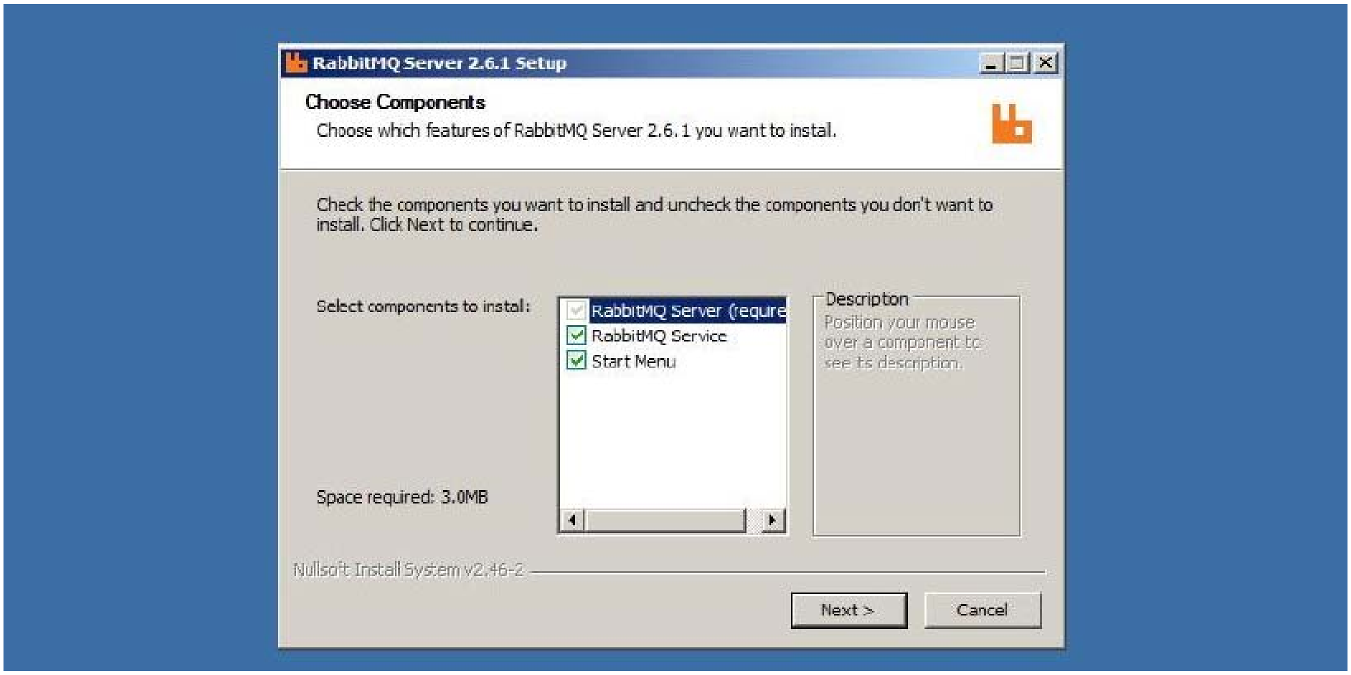
Setup was completed successfully.

Completed

Next run the RabbitMQ installer, rabbitmq-server-2.6.1.exe.

The default component selection (including the “RabbitMQ Service”) is fine,

Click **Next** to start the installation.



RabbitMQ Server 2.6.1 Setup

Choose Components

Choose which features of RabbitMQ Server 2.6.1 you want to instal.

Check the components you want to install and uncheck the components you don't want to install. Click Next to continue.

Select components to instal:

☑ RabbitMQ Server (require
☑ RabbitMQ Service
☑ Start Menu

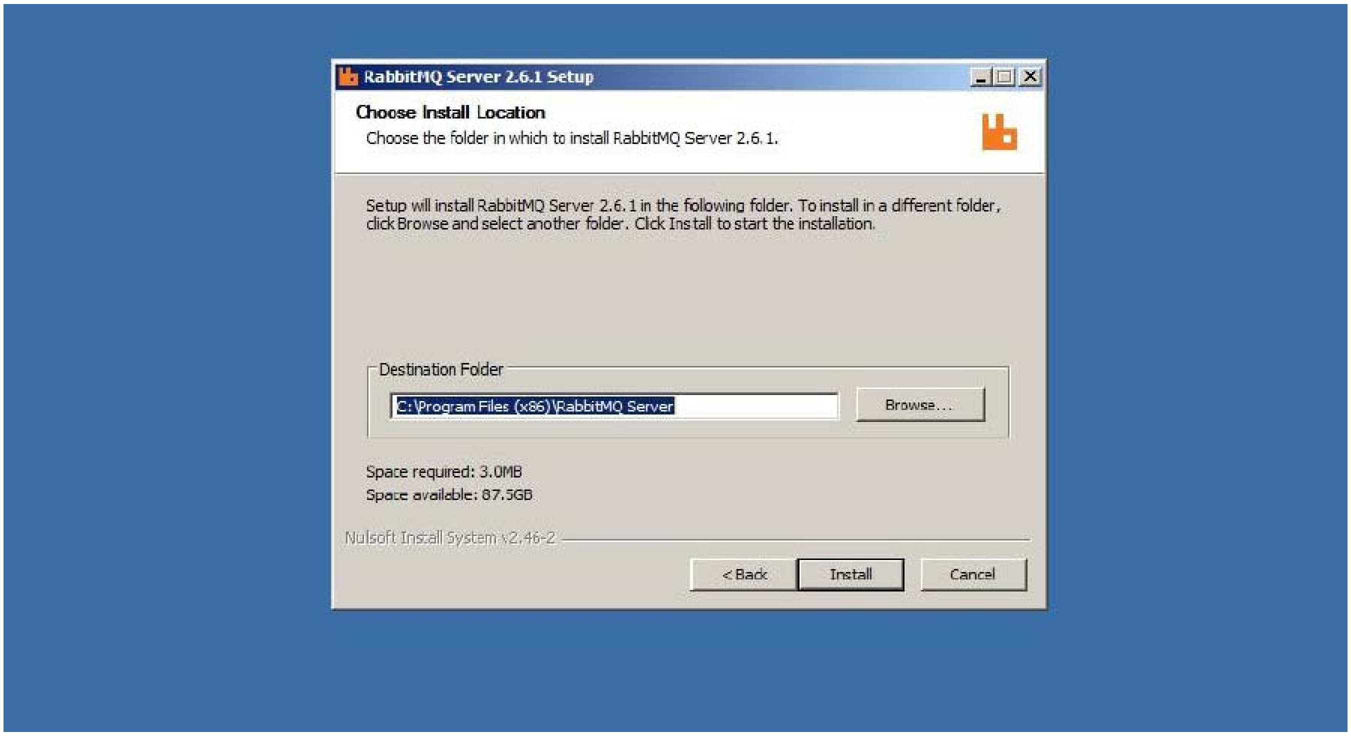
Descripton

Position your mouse over a component to see its description.

Space required: 3.0MB

Nullsoft Install System v2.46-2

The default location is fine:



Choose Install Location

Choose the folder in which to install RabbitMQ Server 2.6.1.

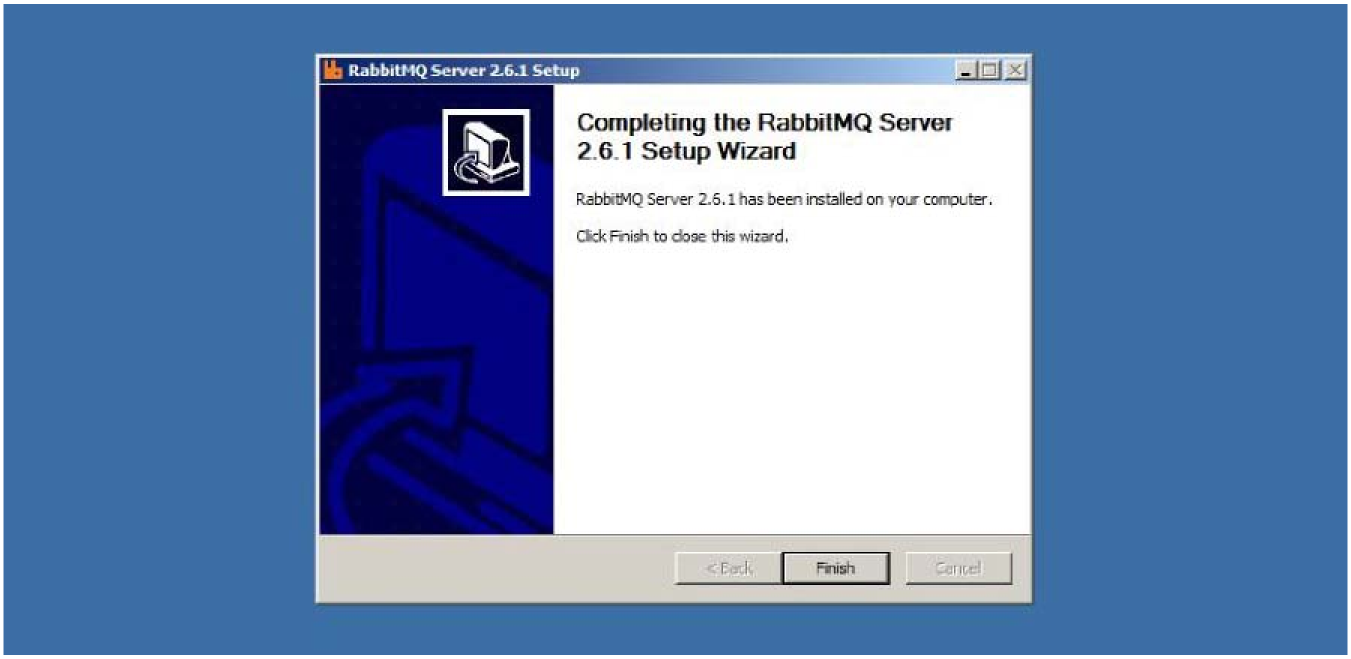
Setup will install RabbitMQ Server 2.6.1 in the following folder. To install in a different folder, click Browse and select another folder. Click Install to start the installation.

Destination Folder

C:\Program Files (x86)\RabbitMQ Server

Space required: 3.0MB
Space available: 87.5GB

The installer should take less than a minute to complete. Click **Finish**.



Completing the RabbitMQ Server 2.6.1 Setup Wizard

RabbitMQ Server 2.6.1 has been installed on your computer.

Click Finish to close this wizard.

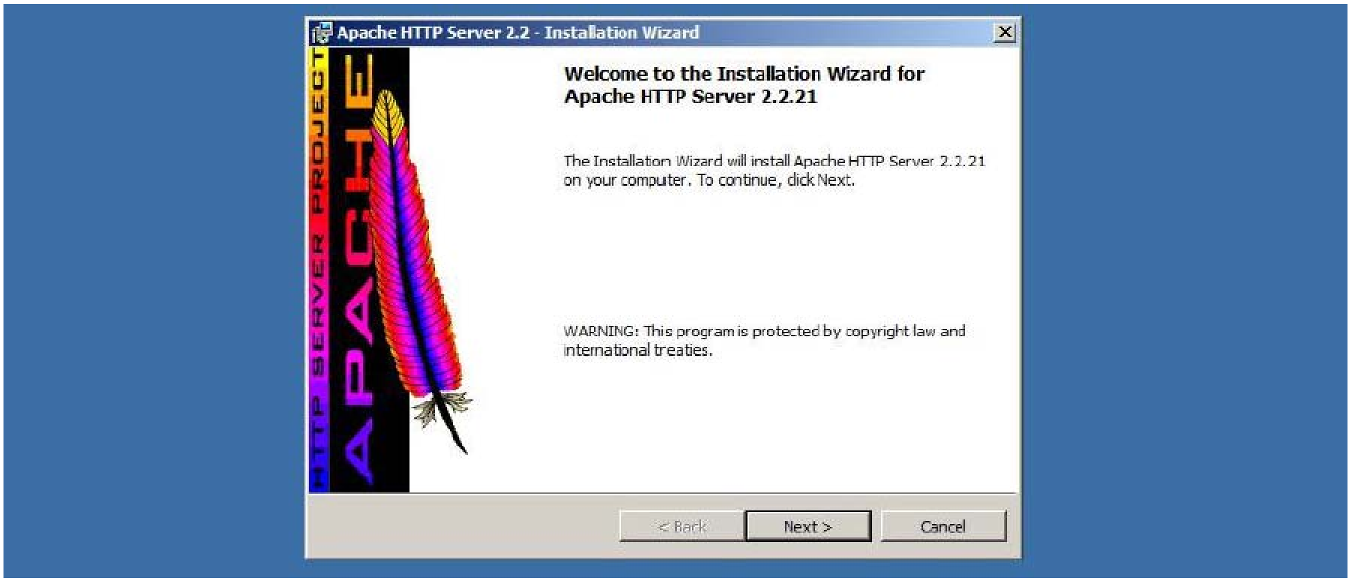
RabbitMQ runs as a Windows Service and requires no additional configuration.

Apache HTTPD

Warning: Apache HTTPD is an alternative webserver to Microsoft IIS. IIS must not be installed on the Montage server, or else it will cause Apache to be unable to bind to port 80 to host the Montage application.

Run the Apache installer, **httpd-2.2.21-win32-x86-openssl-0.9.8r.msi**.

Click **Next**.



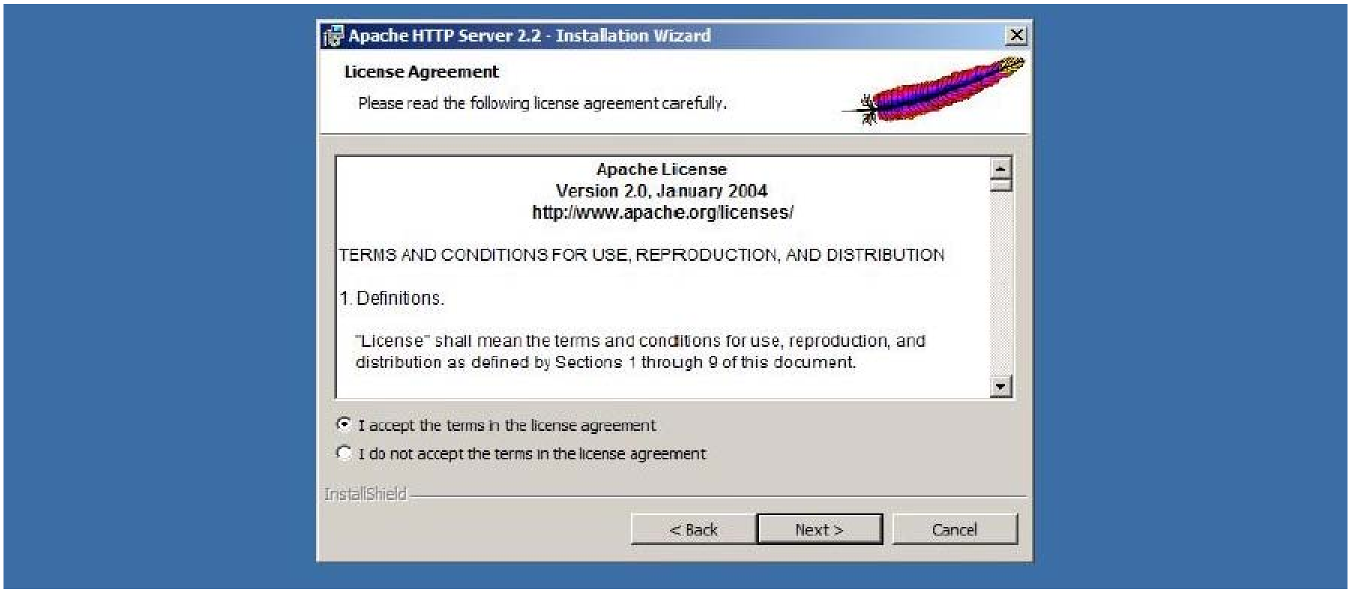
Apache HTTP Server 2.2 - Installation Wizard

Welcome to the Installation Wizard for Apache HTTP Server 2.2.21

The Installation Wizard will install Apache HTTP Server 2.2.21 on your computer. To continue, click Next.

WARNING: This program is protected by copyright law and international treaties.

Accept the license and click **Next**.



Apache HTTP Server 2.2 - Installation Wizard

License Agreement

Please read the following license agreement carefully.

Apache License
Version 2.0, January 2004
http://www.apache.org/licenses/

TERMS AND CONDITIONS FOR USE, REPRODUCTION, AND DISTRIBUTION

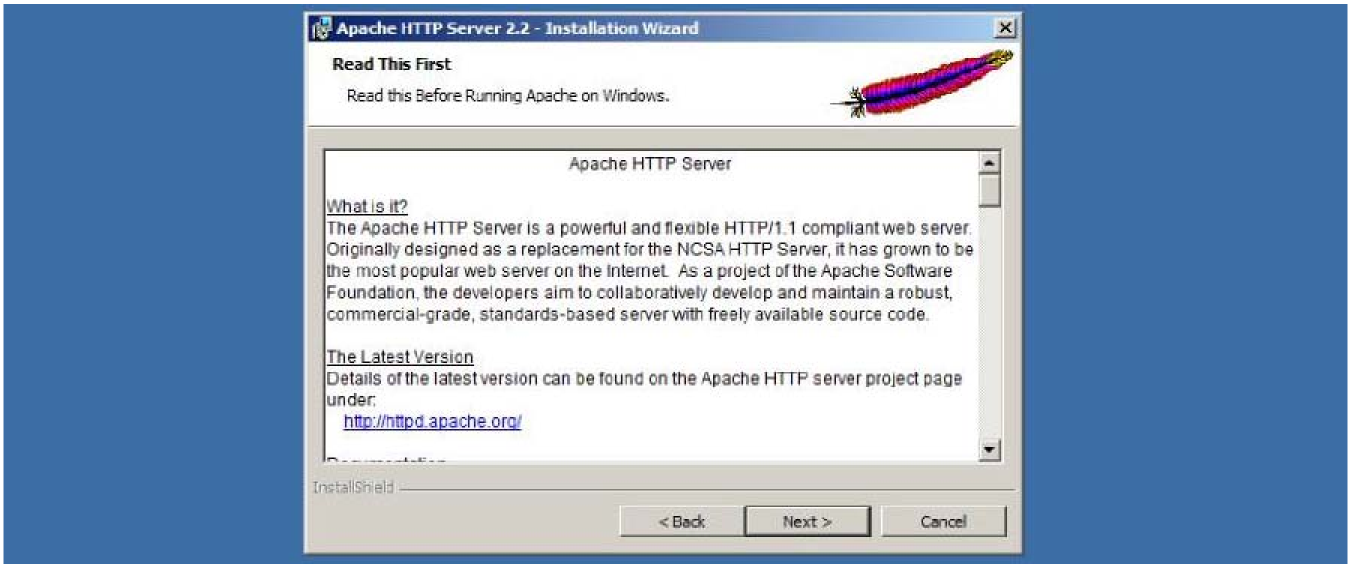
1. Definitions.

"License" shall mean the terms and conditions for use, reproduction, and distribution as defined by Sections 1 through 9 of this document.

● I accept the terms in the license agreement

○ I do not accept the terms in the license agreement

A description of Apache displays, click **Next**.



Apache HTTP Server 2.2 - Installation Wizard

Read This First

Read this Before Running Apache on Windows.

Apache HTTP Server

What is it?

The Apache HTTP Server is a powerful and flexible HTTP/1.1 compliant web server. Originally designed as a replacement for the NCSA HTTP Server, it has grown to be the most popular web server on the Internet. As a project of the Apache Software Foundation, the developers aim to collaboratively develop and maintain a robust, commercial-grade, standards-based server with freely available source code.

The Latest Version

Details of the latest version can be found on the Apache HTTP server project page under:

http://httpd.apache.org/

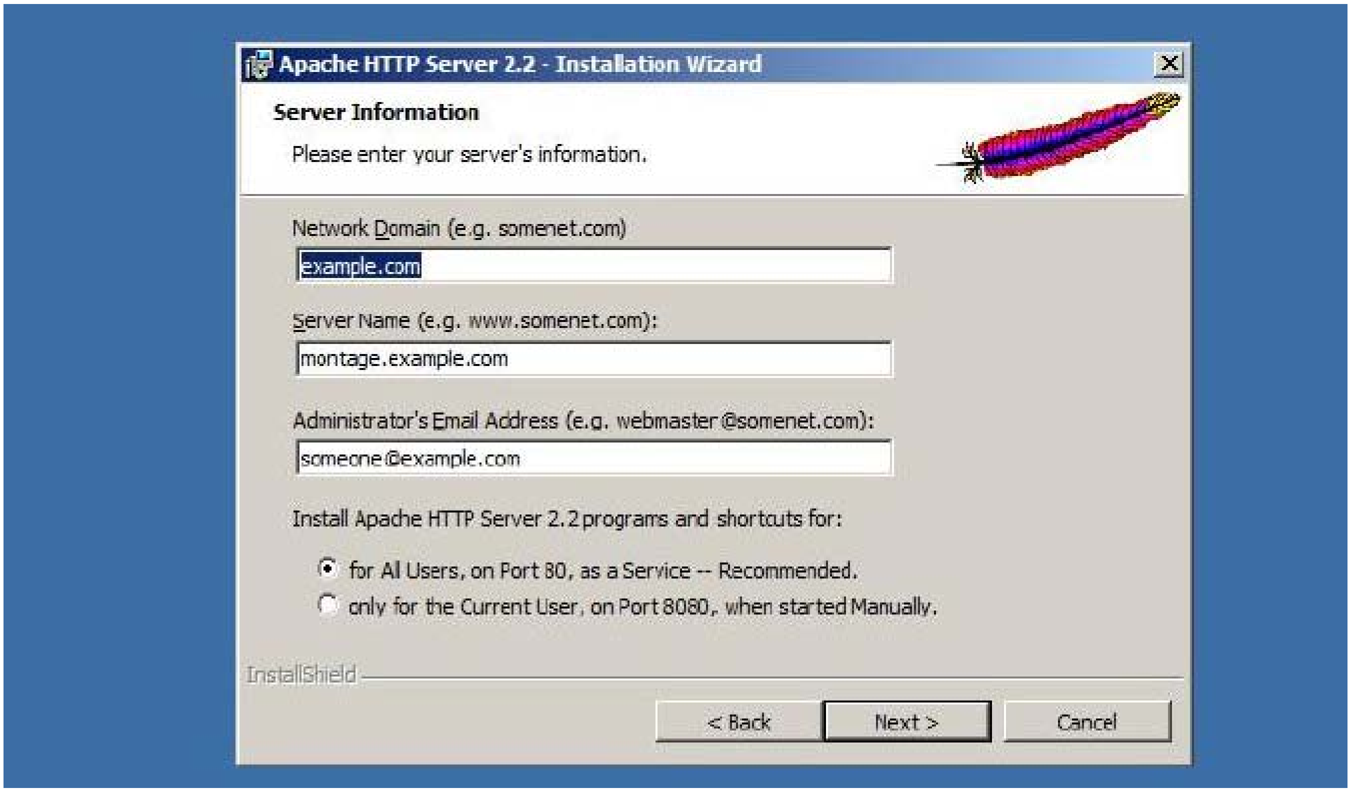
As part of the Pre-Install Checklist, you will have a domain name that the server will run as (e.g. montage.example.com).

Enter the top-level domain (e.g. example.com) for the Network Domain and the Montage domain (e.g. montage.example.com) for the Server Name.

You may also enter an email address. This address will only ever be displayed if the server is improperly configured and Montage cannot load.

Check to install Apache **for All Users, on Port 80**.

Click **Next**.



Apache HTTP Server 2.2 - Installation Wizard

Server Information

Please enter your server's information.

Network Domain (e.g. somenet.com)

example.com

Server Name (e.g. www.somenet.com):

montage.example.com

Administrator's Email Address (e.g. webmaster@somenet.com):

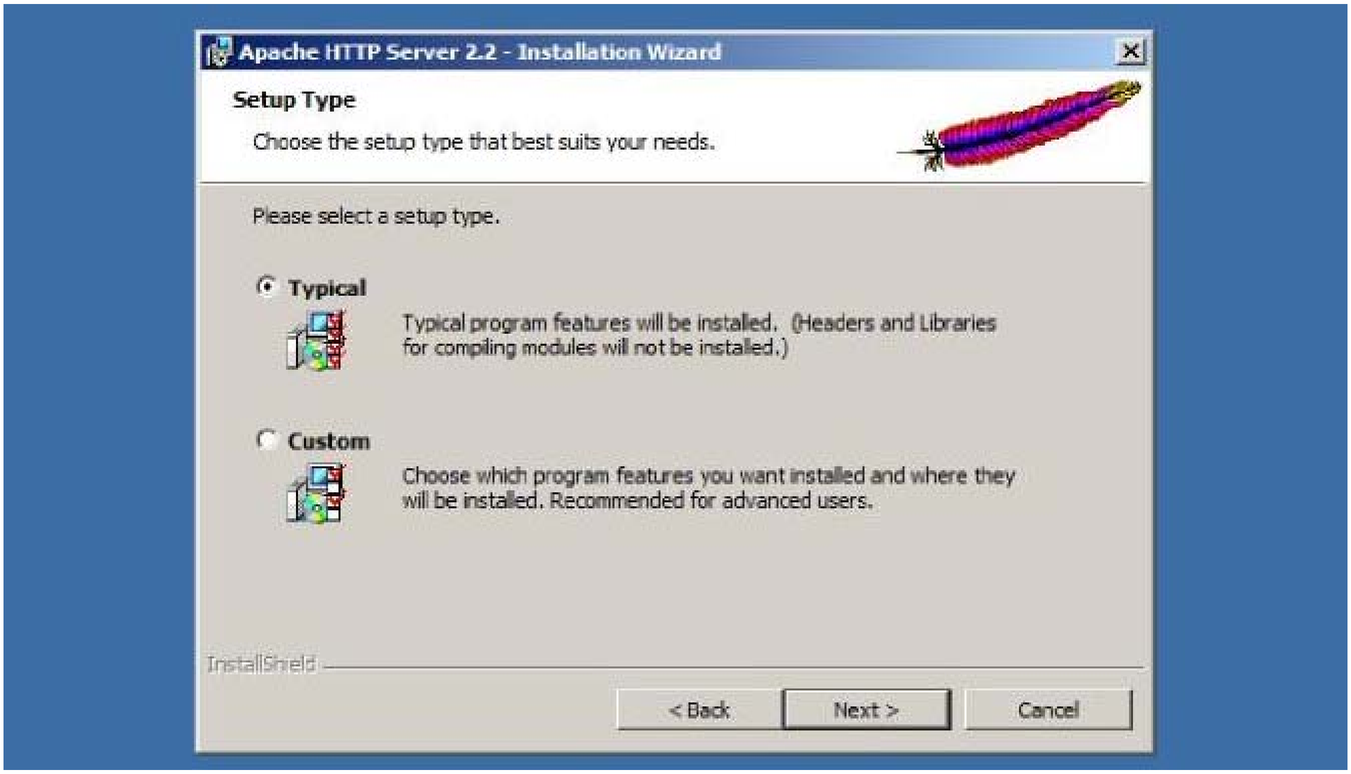
someone@example.com

Install Apache HTTP Server 2.2 programs and shortcuts for:

● for All Users, on Port 80, as a Service -- Recommended.

○ only for the Current User, on Port 8080, when started Manually.

Select the **Typical** installation (The Apache development header files are not needed.), and click **Next**.



Apache HTTP Server 2.2 - Installation Wizard

Setup Type

Choose the setup type that best suits your needs.

Please select a setup type.

● Typical

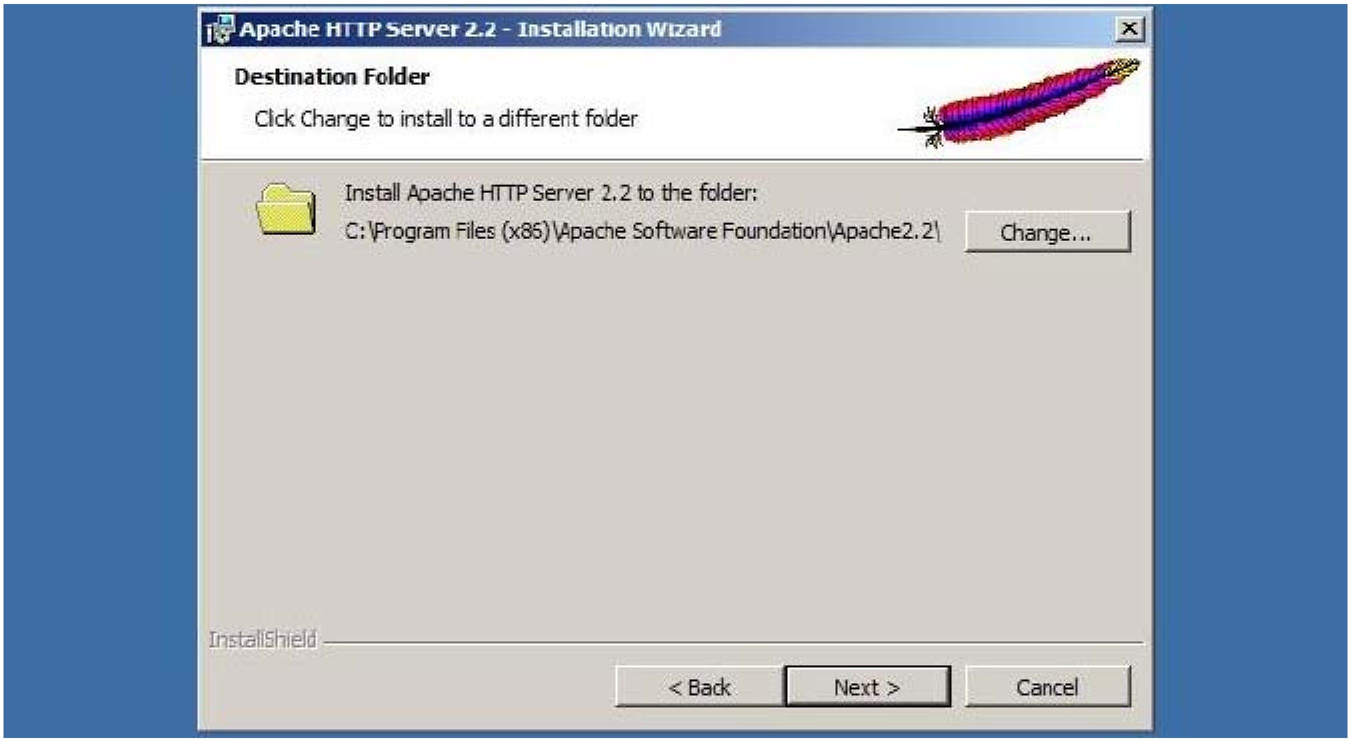
Typical program features will be installed. (Headers and Libraries for compiling modules will not be installed.)

○ Custom

Choose which program features you want installed and where they will be installed. Recommended for advanced users.

The default location is required. **Click Next**.

Warning: The Montage installer will automatically register itself with Apache, but requires that Apache is installed in this default location on C:\



Apache HTTP Server 2.2 - Installation Wizard

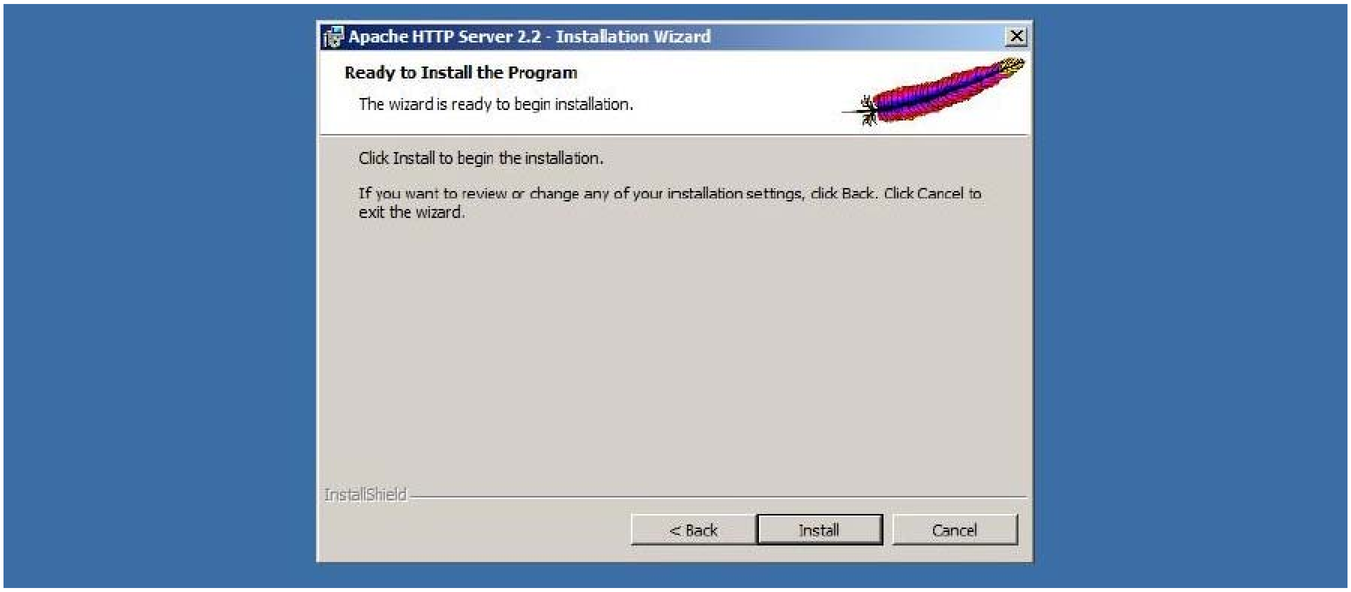
Destination Folder

Click Change to install to a different folder

Install Apache HTTP Server 2.2 to the folder:

C:\Program Files (x86)\Apache Software Foundation\Apache2.2\

Click **Install** to start the installation.



Apache HTTP Server 2.2 - Installation Wizard

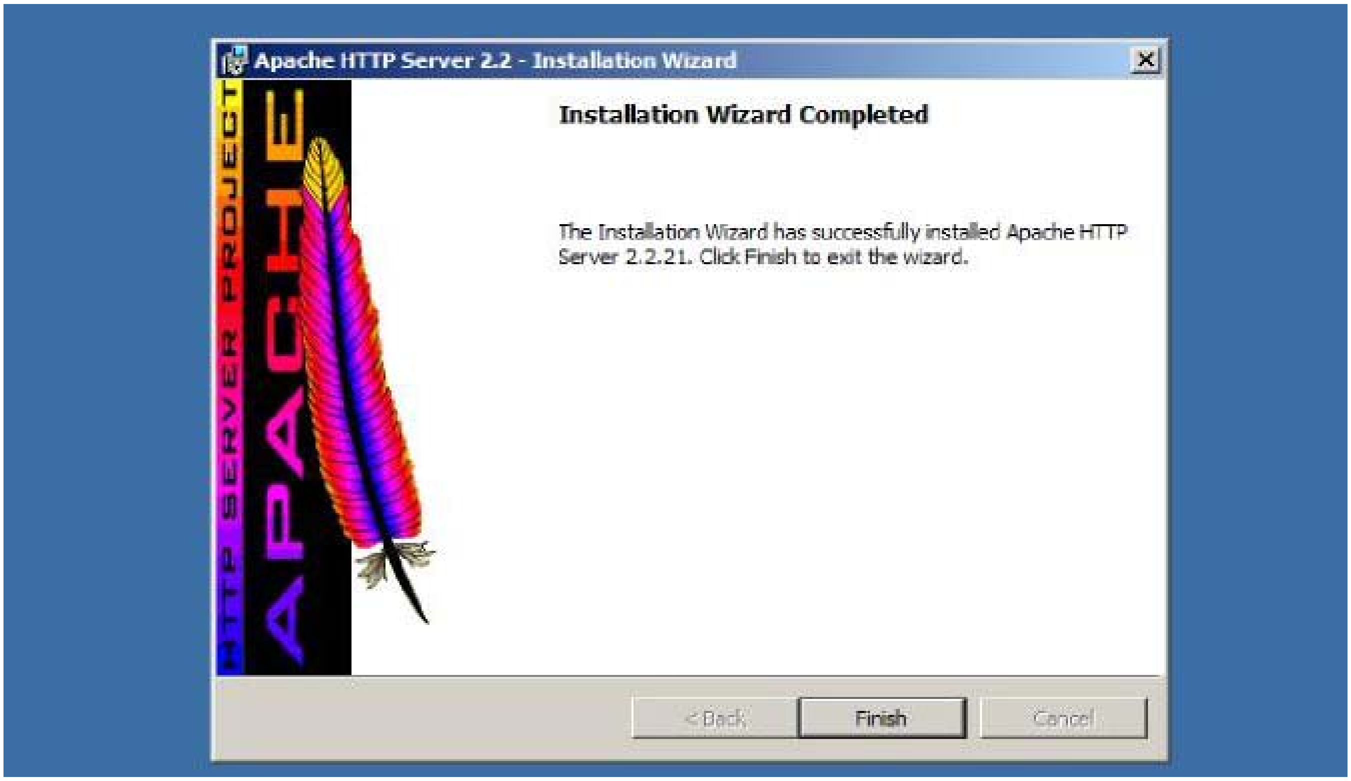
Ready to Install the Program

The wizard is ready to begin installation.

Click Install to begin the installation.

If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.

The install should take less than a minute, when completed, click **Finish**.



Installation Wizard Completed

The Installation Wizard has successfully installed Apache HTTP Server 2.2.21. Click Finish to exit the wizard.

Apache will run as a Windows Service.

Initial Configuration

The Montage installer expects a certain level of configuration to exist before it is run, so that it can use these settings to set up the Montage installation.

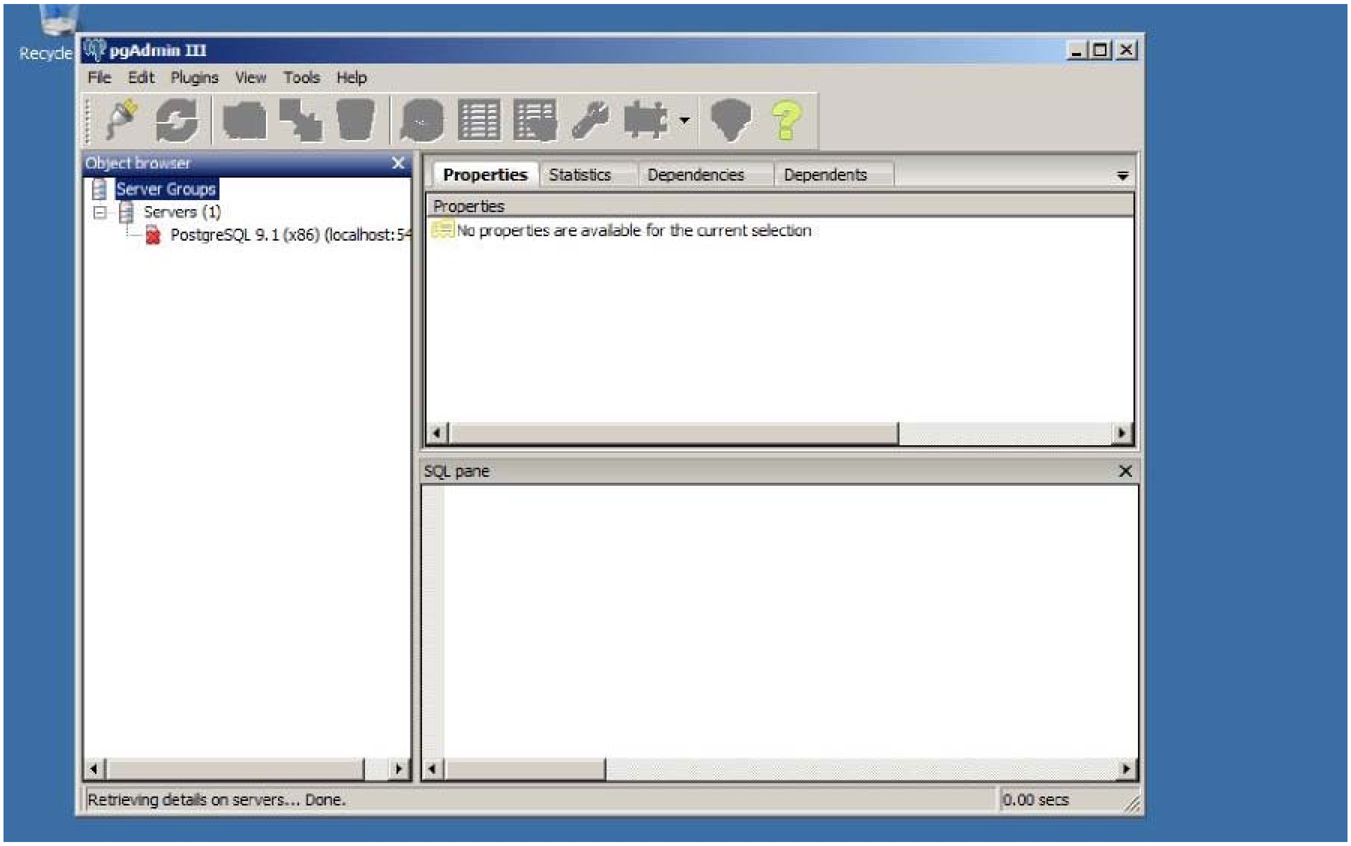
- Create the PostgreSQL User & Database
- Montage Settings & License
  - montage-modules.json - License
  - settings.py - Main Config File
- Windows Firewall
- Next Steps

Create the PostgreSQL User & Database

The first item of configuration is to create a user and database in PostgreSQL for Montage to connect with and use.

You can use the command-line psql tool, but we will demostrate using the GUI-based pgAdmin III tool, which was installed when we installed PostgreSQL.

To open pgAdmin, Start -+ All Programs -+ PostgreSQL 9.1 -+ pgAdmin III


Recycle
pgAdmin III
File Edit Plugins View Tools Help
Object browser
Server Groups
Servers (1)
PostgreSQL 9.1 (x86) (localhost:54
Properties Statistics Dependencies Dependents
Properties
SQL pane

No properties are available for the current selection

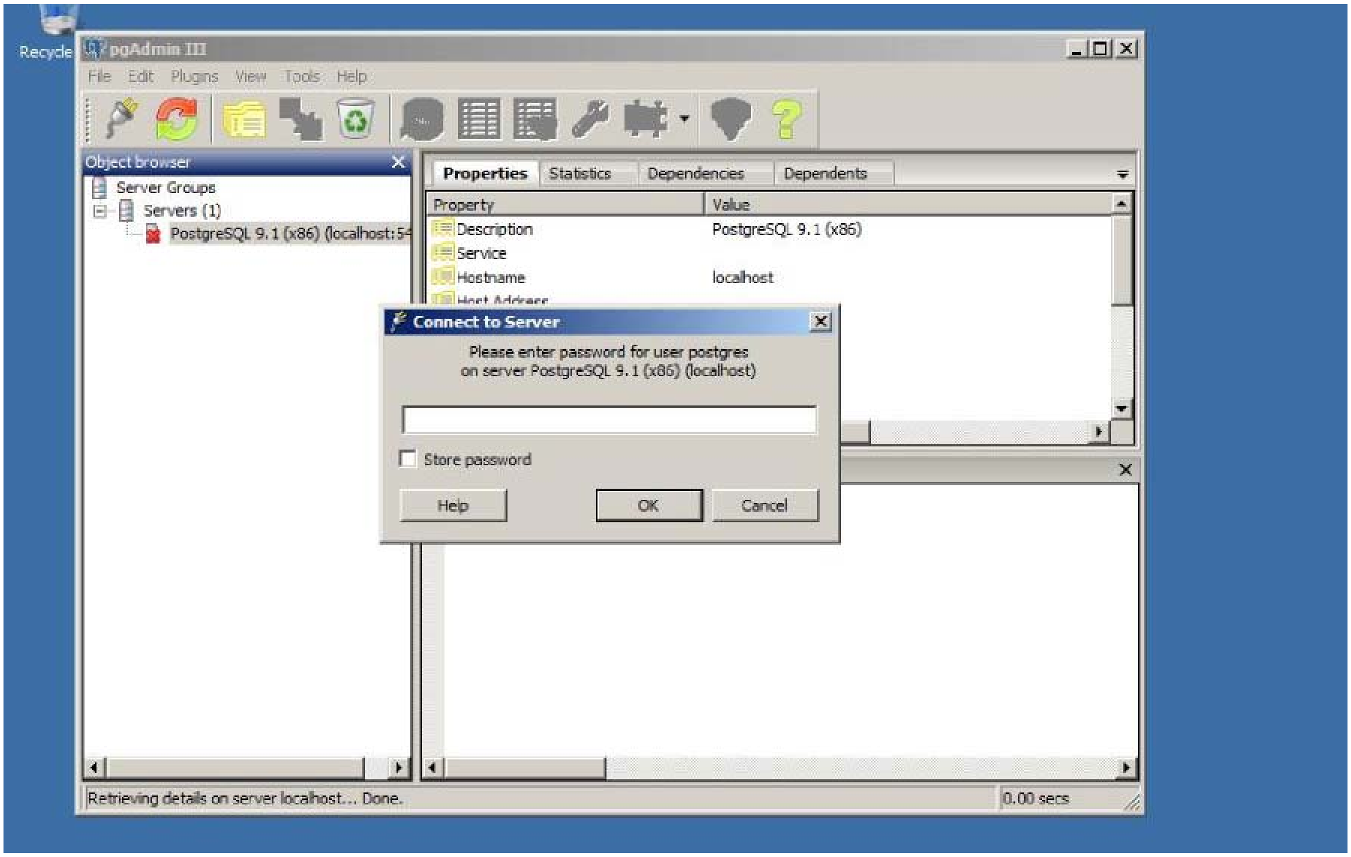
Retrieving details on servers... Done.

0.00 secs

pgAdmin will display all servers it knows about (by default it should display PostgreSQL 9.1 (x86) (localhost:5432), which was recently installed. The red X indicates that pgAdmin is not currently connected to that server.

To connect, double-click on that server.

We will be prompted to enter the password for the postgres user that was previously configured:



Property	Value
Description	PostgreSQL 9.1 (x86)
Service	
Hostname	localhost
Host Address	

Connect to Server

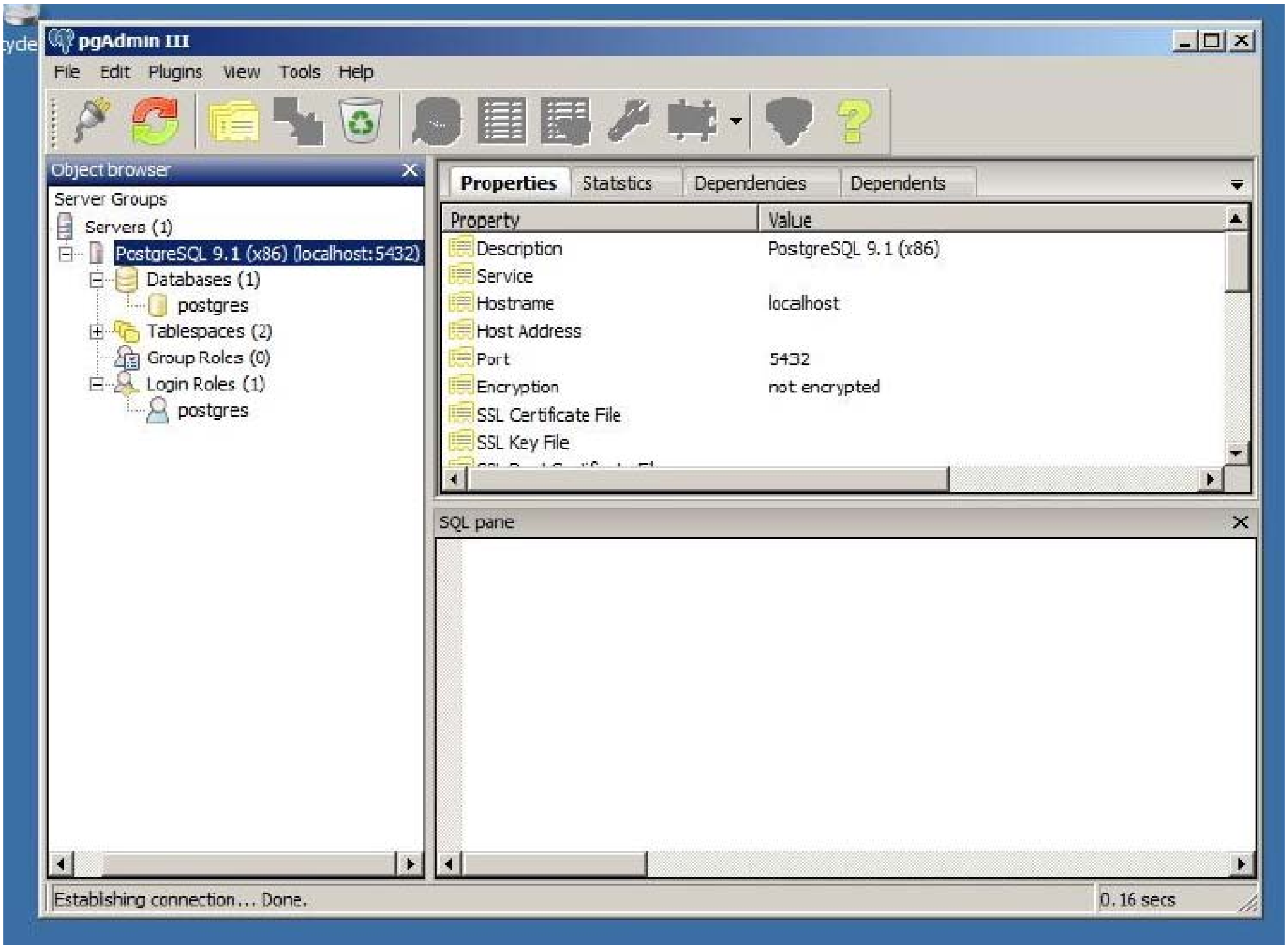
Please enter password for user postgres
on server PostgreSQL 9.1 (x86) (localhost)

□ Store password

Retrieving details on server localhost... Done.

0.00 secs

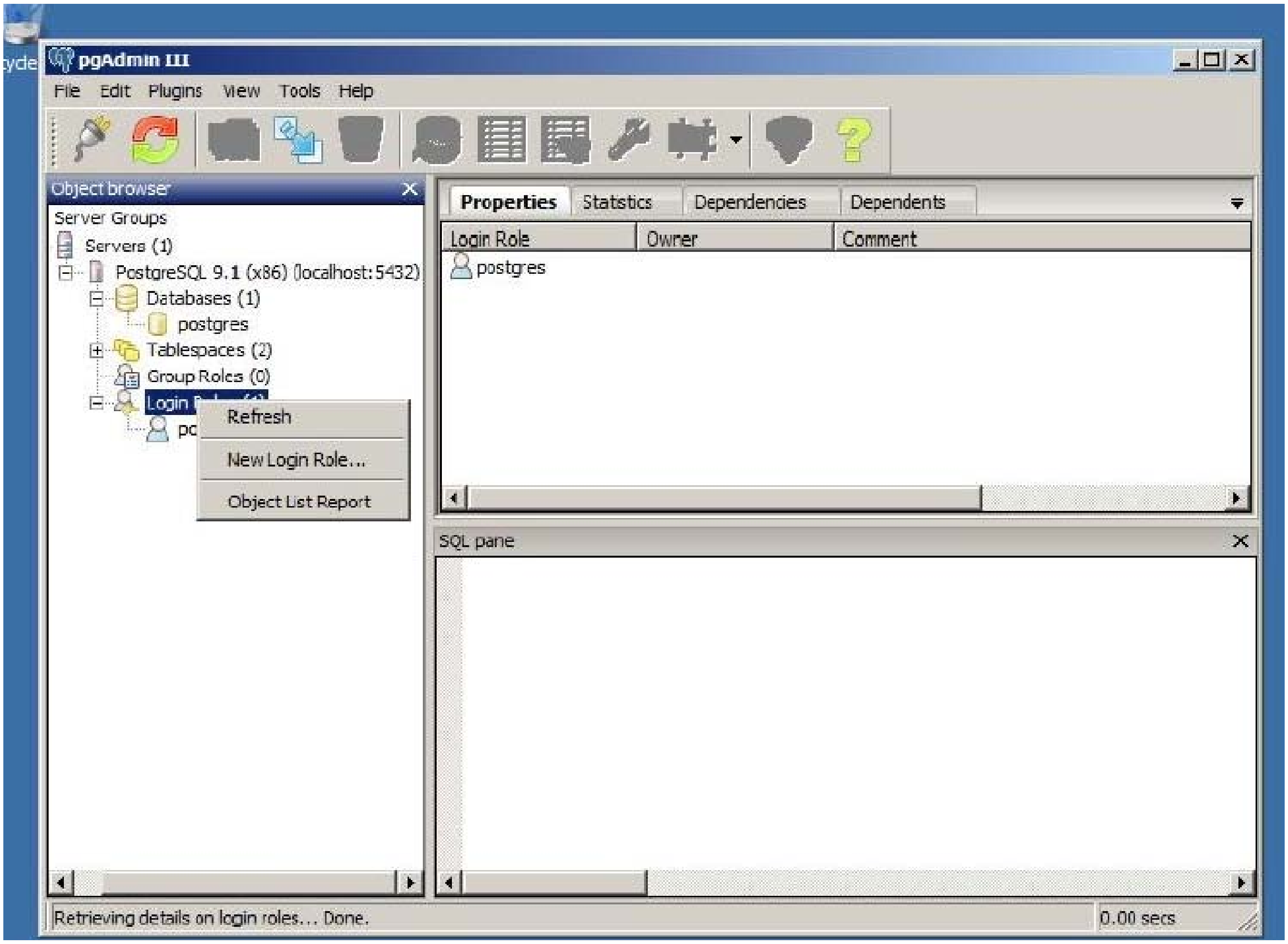
You should now be connected to the PostgreSQL server. If you expand the **Databases** and **Login Roles**, you will see that only the default **postgres** user and database exist.



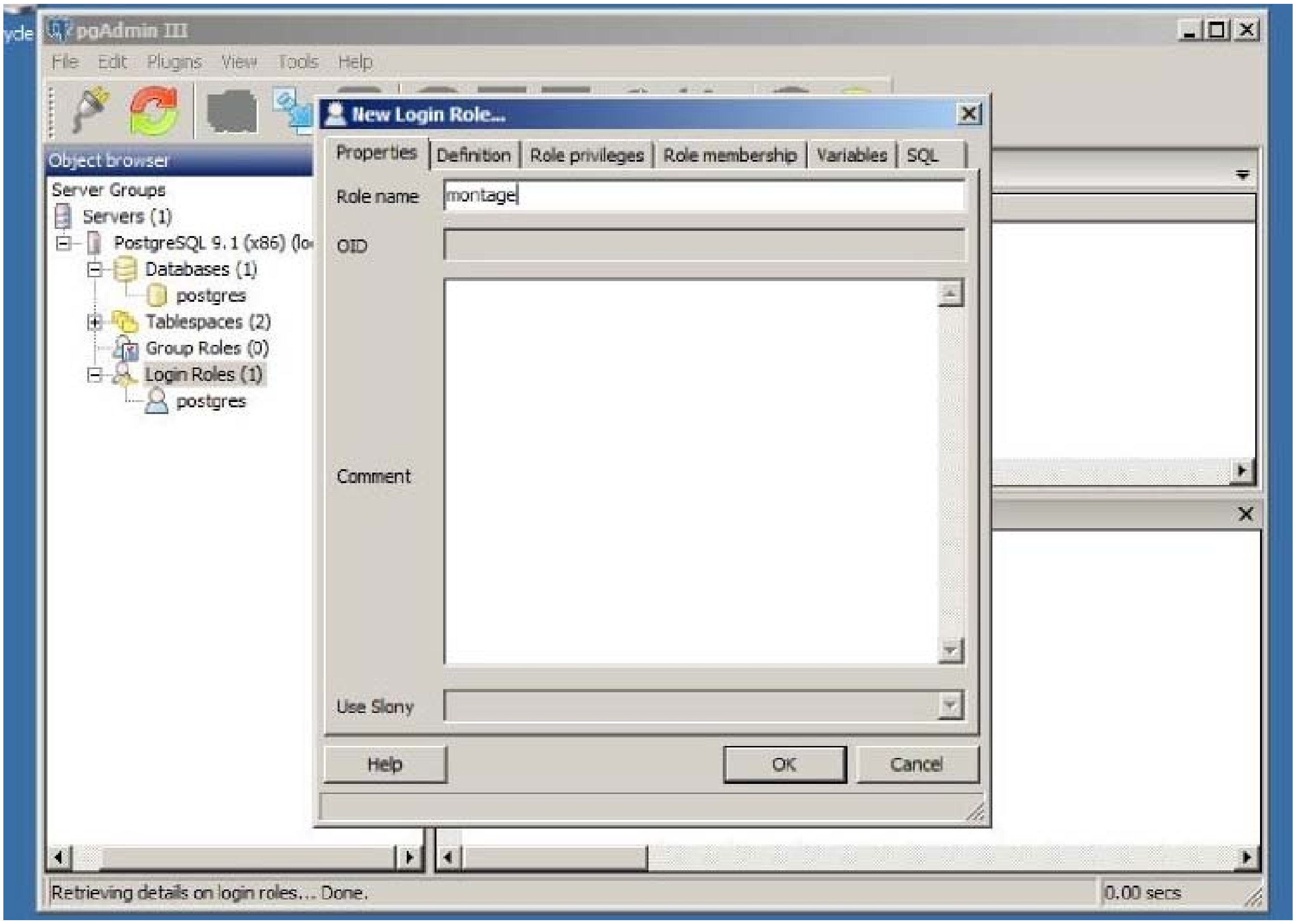
Property	Value
Description	PostgreSQL 9.1 (x86)
Service	
Hostname	localhost
Host Address	
Port	5432
Encryption	not encrypted
SSL Certificate File	
SSL Key File	

Establishing connection... Done. 0.16 secs

Create a new user, montage, by right-clicking **Login Roles**, and then click **New Login Role...**.



On the default Properties tab, enter the Role name as **montage**.



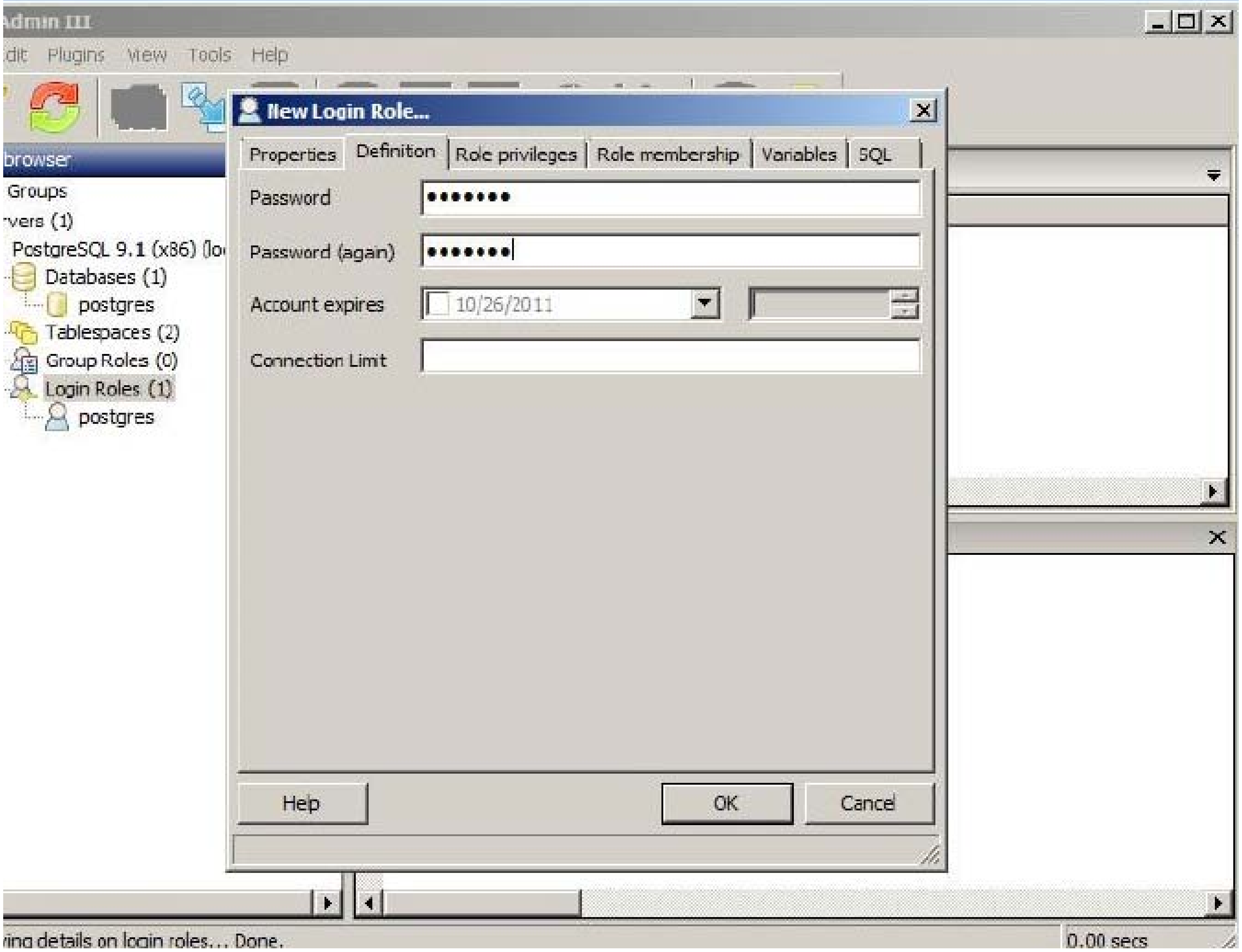
Role name: montage

Retrieving details on login roles... Done.

On the Definition tab, set the montage user’s password.

Since the firewall will block any external requests to the PostgreSQL server, the password does not have to be extremely secure. By default Montage will assume the password is “montage”. If you select a different password, make sure to note the password, since you will need it to configure Montage with the non-default password.

After you entered the *Password* and the *Password (again)*, click **OK** to create the user.



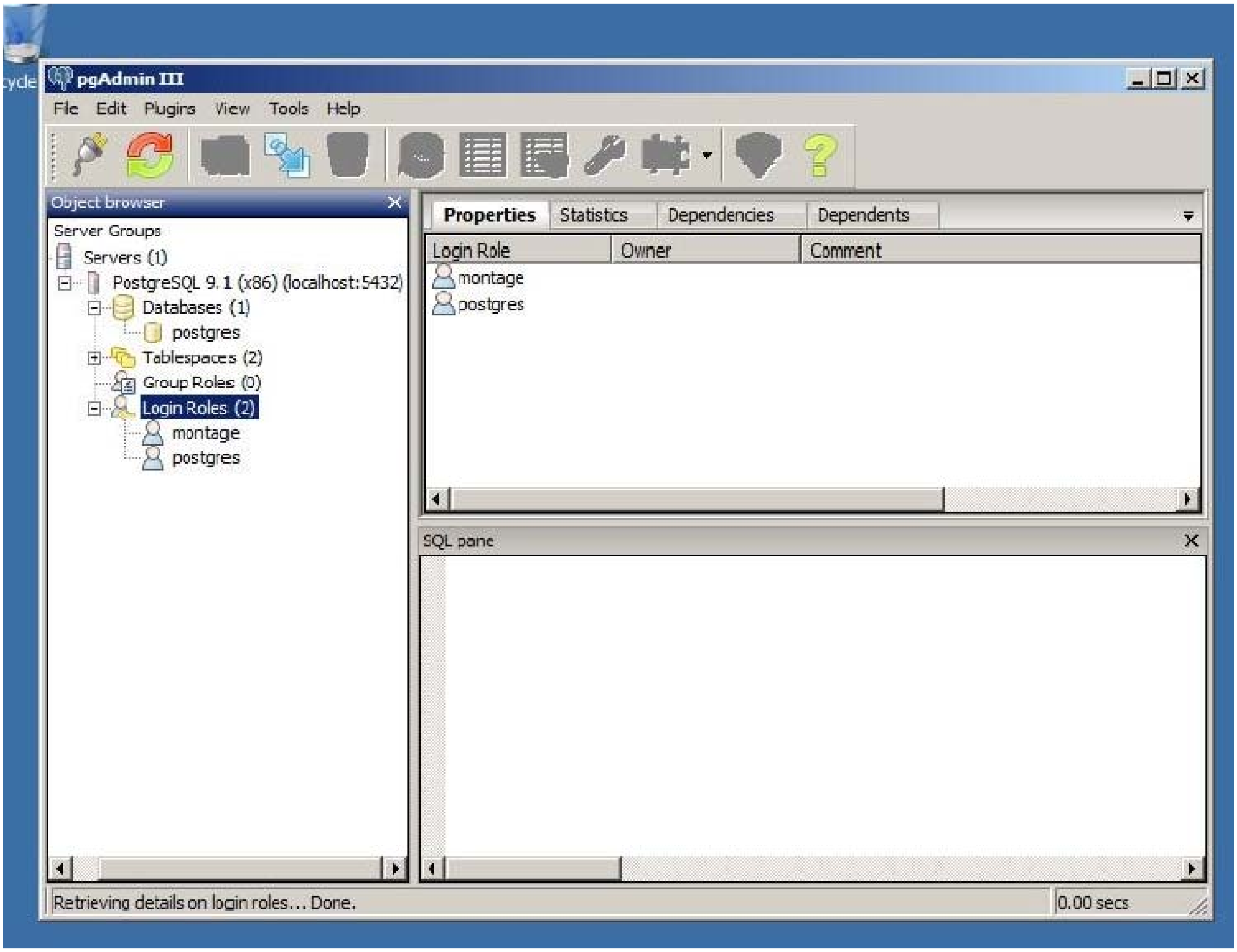
Password: •••••••

Password (again): •••••••

Account expires: □ 10/26/2011

Connection Limit:

The **montage** user should display in the Login Roles tree.

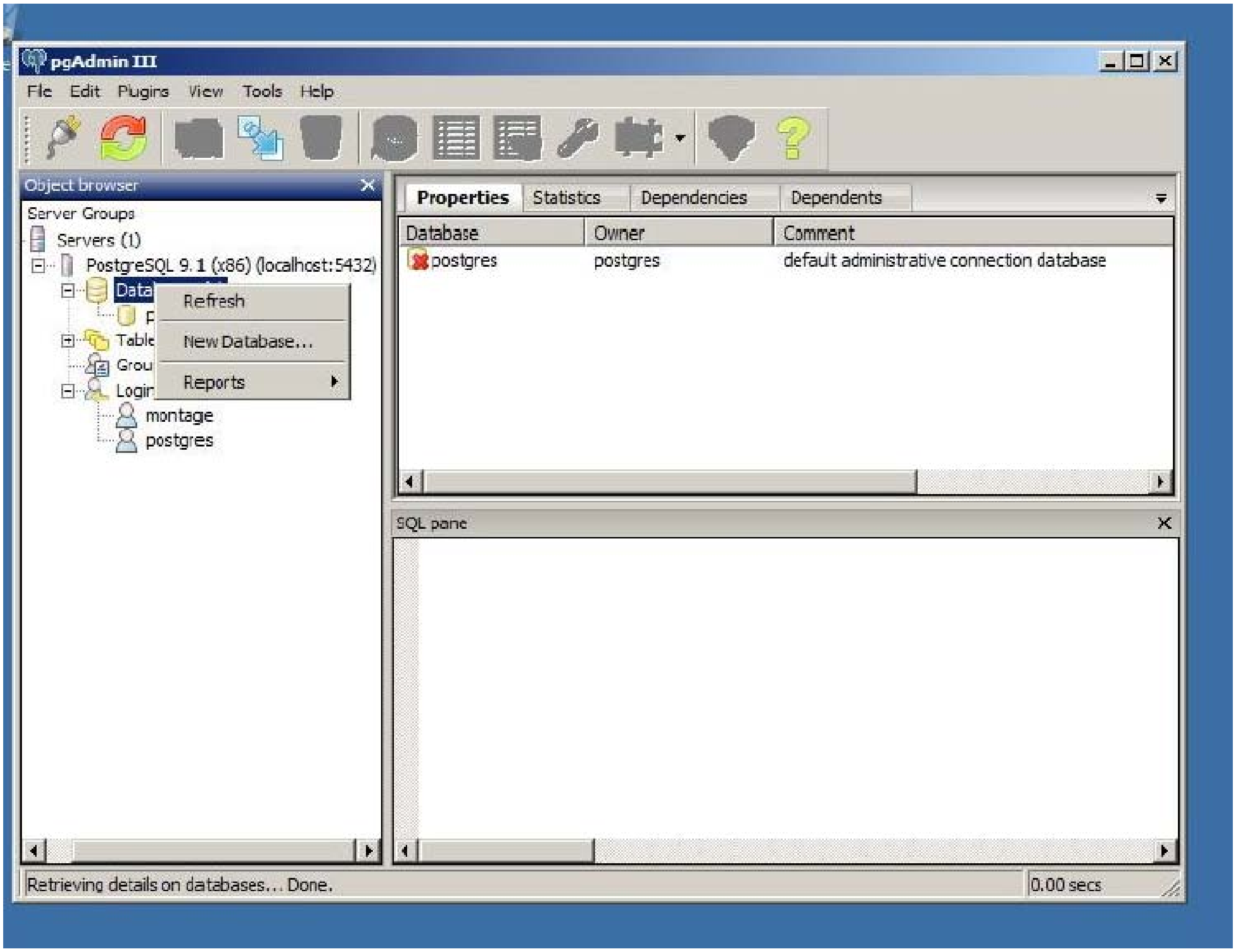


Login Role	Owner	Comment
montage		
postgres		

Retrieving details on login roles... Done.

0.00 secs

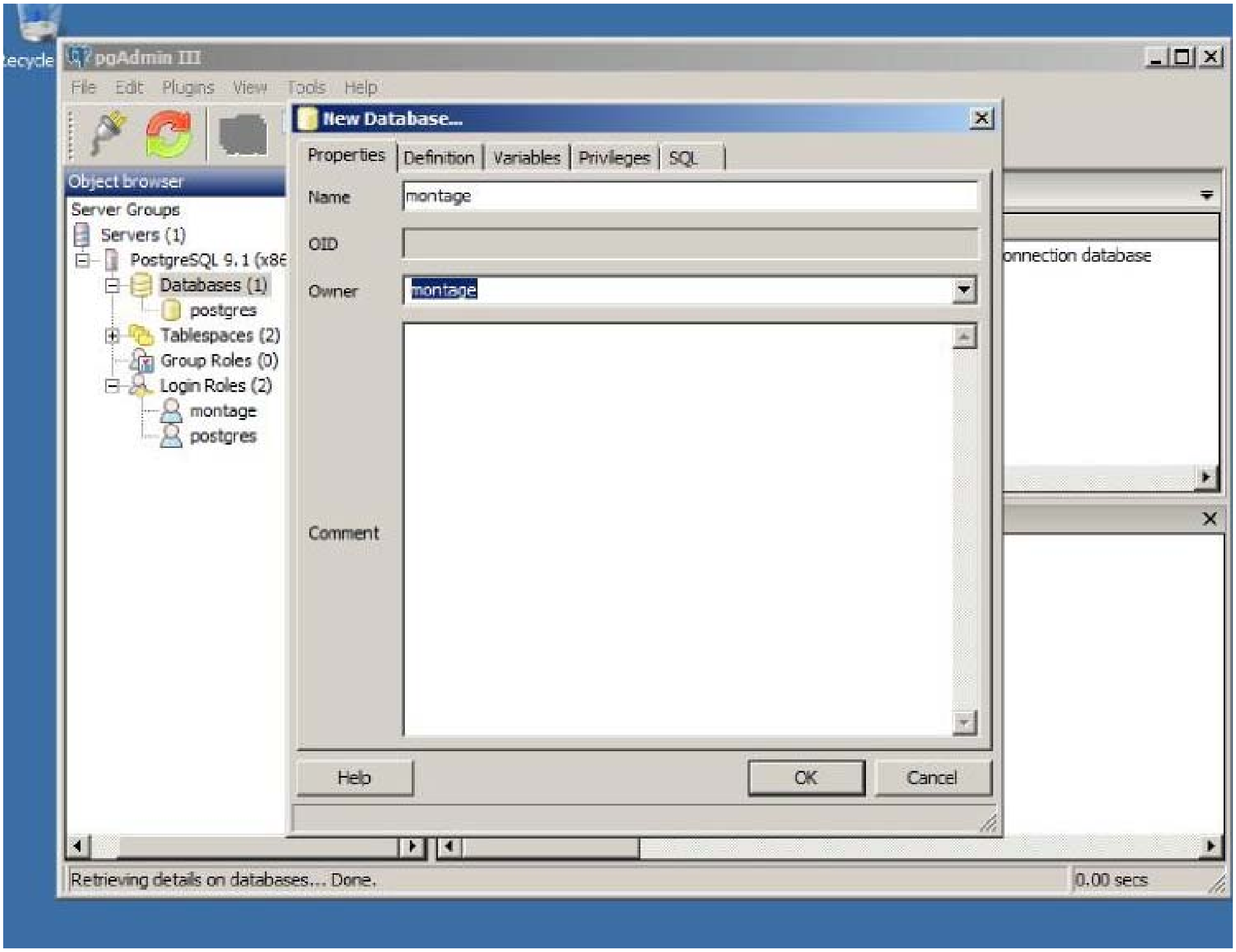
Create the montage database by right-clicking the Databases tree and select **New Database...**.



Database	Owner	Comment
postgres	postgres	default administrative connection database

Retrieving details on databases... Done.

On the default Properties tab, enter the Name as **montage** and set the owner to the new montage Login Role.



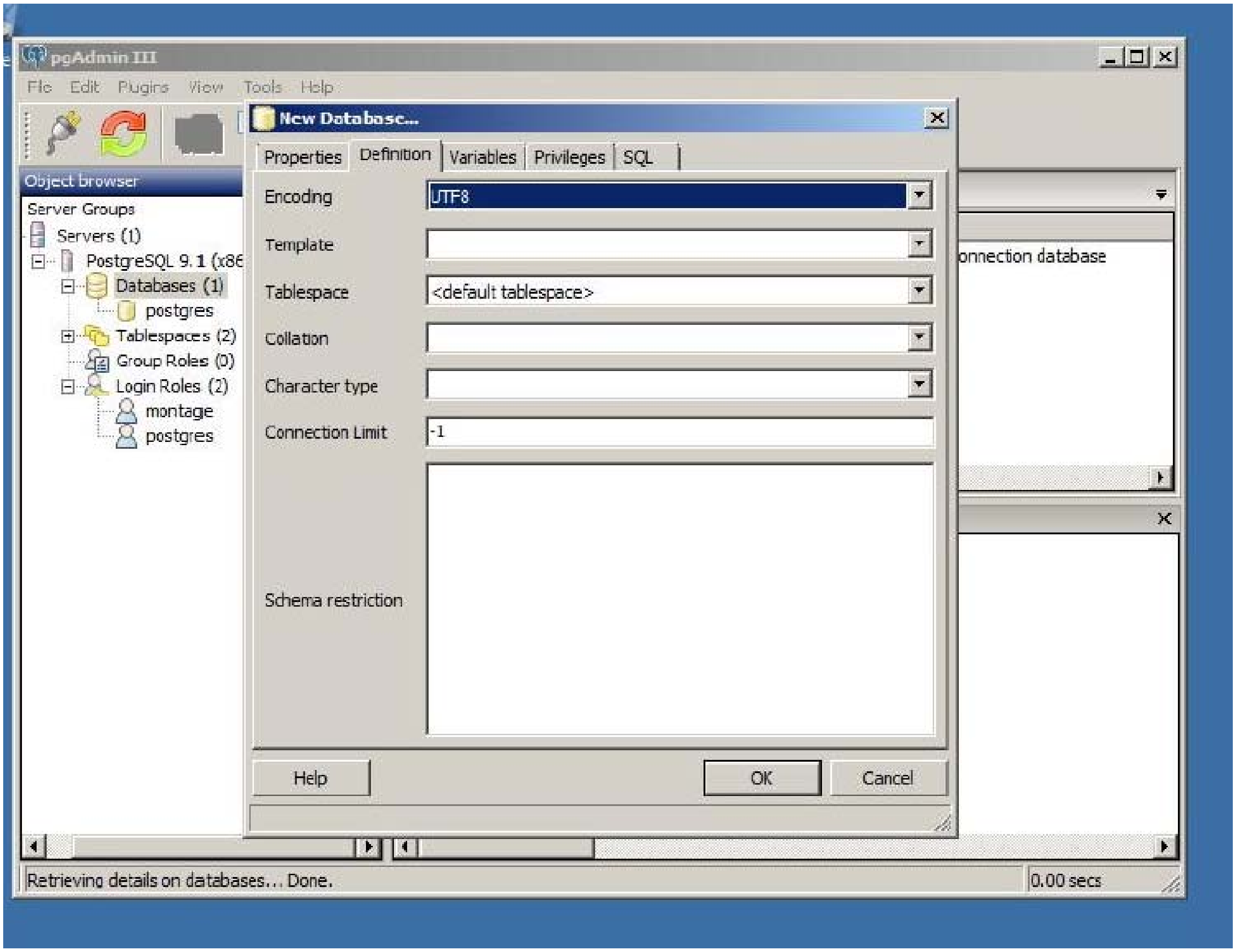
Name: montage

Owner: montage

Retrieving details on databases... Done.

On the Definition tab and ensure Encoding is UTF8 (it should already be set to UTF8, but Montage will not correctly work if the encoding is anything else.)

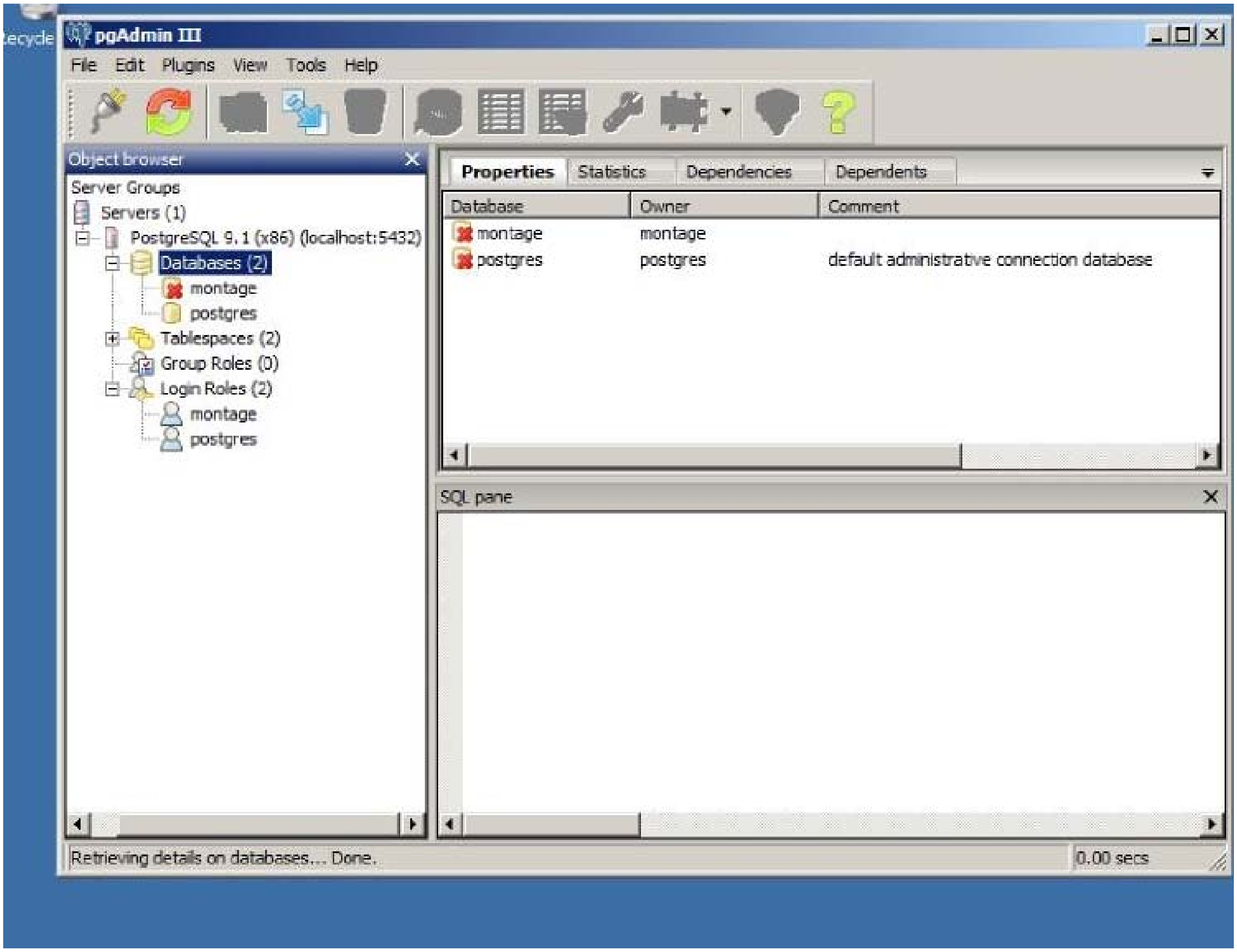
Click **OK** to create the database, which will take several seconds to allocate the database files:



Encoding: UTF8
Template:
Tablespace: <default tablespace>
Collation:
Character type:
Connection Limit: -1

Retrieving details on databases... Done.
0.00 secs

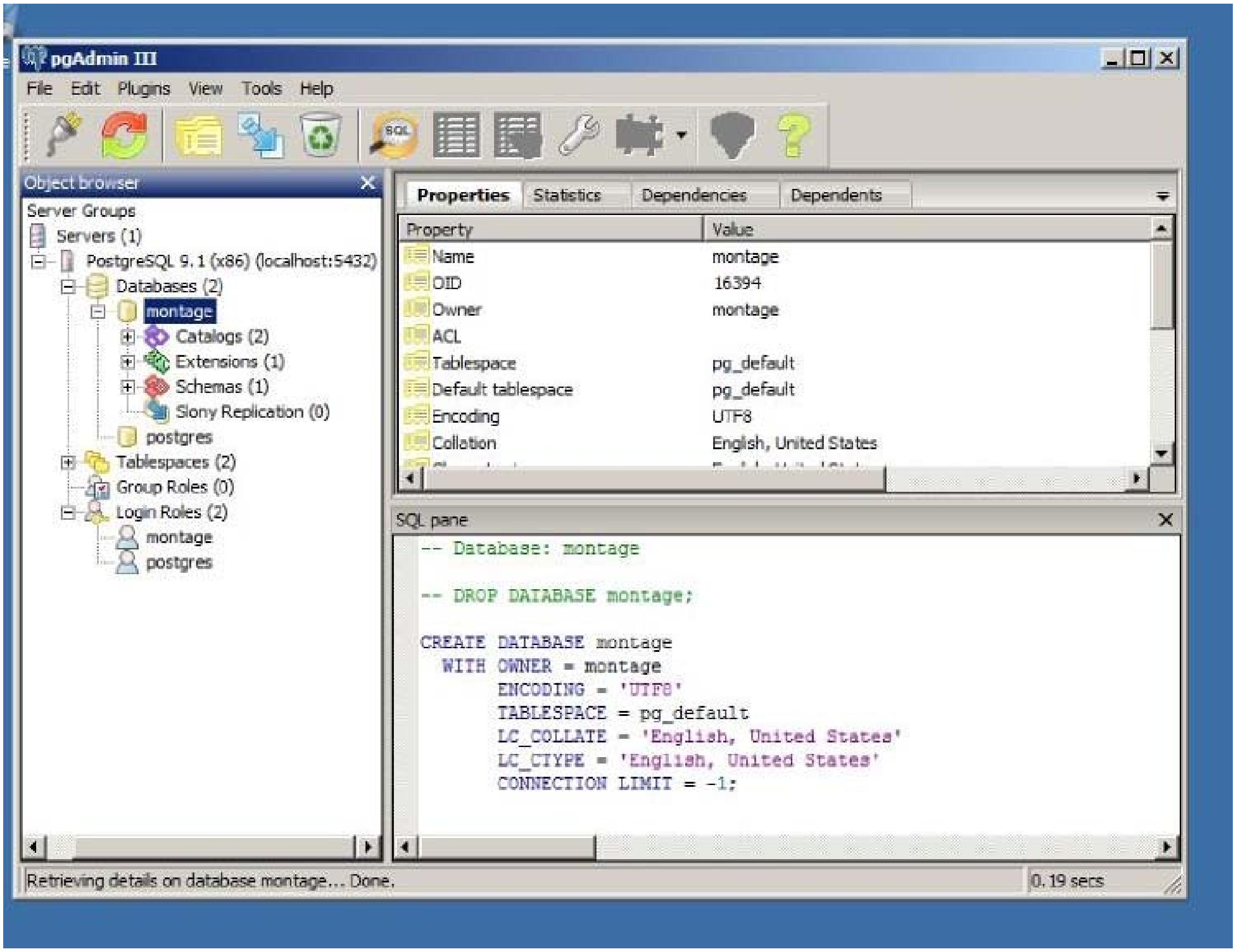
The montage database displays with a red X.



Database	Owner	Comment
montage	montage	
postgres	postgres	default administrative connection database

Retrieving details on databases... Done. 0.00 secs

The red X indicates that it is not connected to that database, but double-clicking on the database name will automatically connect and show the contents of the database (It will currently not have any tables, since the Montage installer has not yet been run).



Property	Value
Name	montage
OID	16394
Owner	montage
ACL	
Tablespace	pg_default
Default tablespace	pg_default
Encoding	UTF8
Collation	English, United States

```
-- Database: montage

-- DROP DATABASE montage;

CREATE DATABASE montage
  WITH OWNER = montage
       ENCODING = 'UTF8'
       TABLESPACE = pg_default
       LC_COLLATE = 'English, United States'
       LC_CTYPE = 'English, United States'
       CONNECTION LIMIT = -1;
```

Retrieving details on database montage... Done.

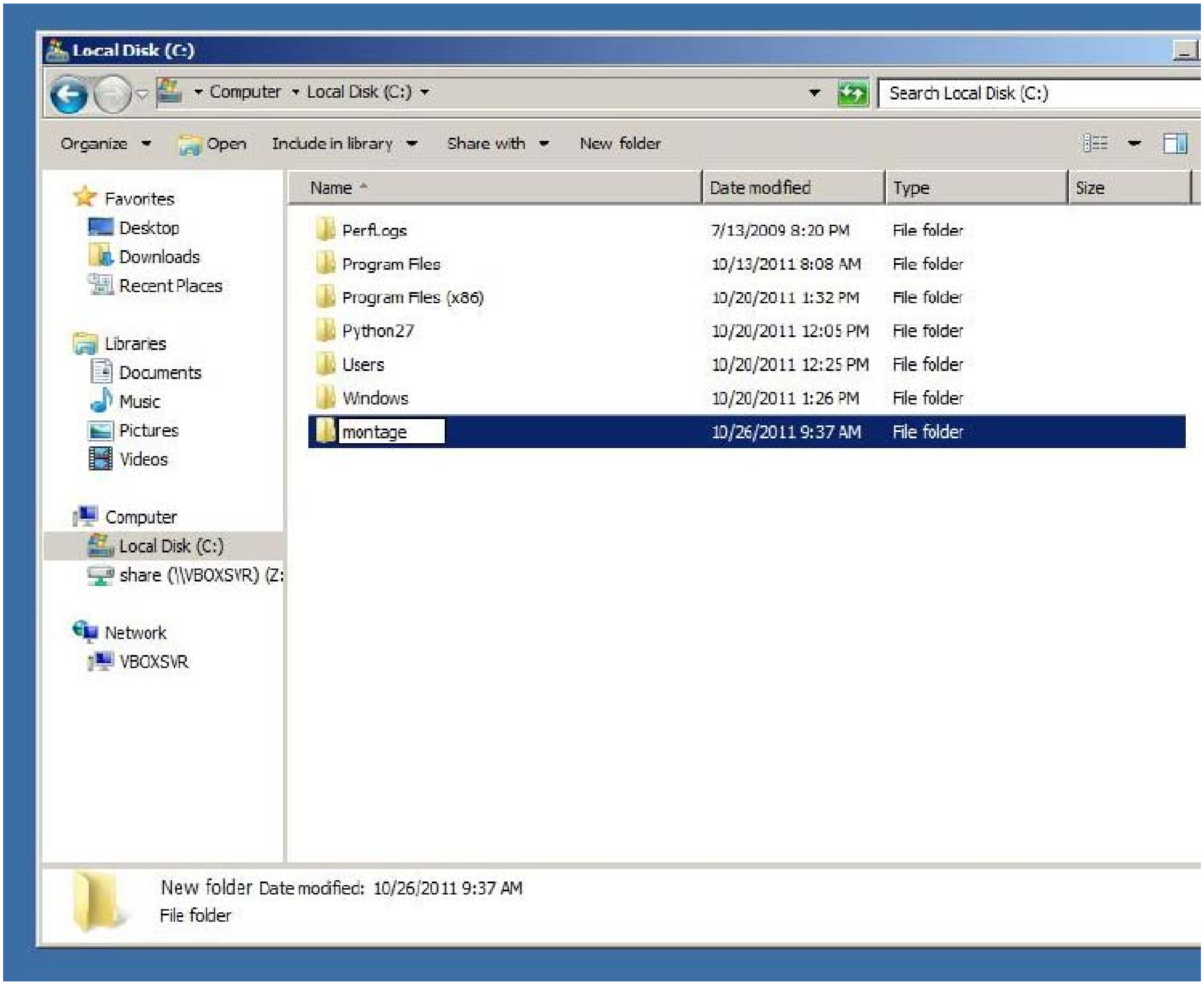
0.19 secs

Montage Settings & License

During the Montage installer, you will be prompted for the Montage installation path, by default C:\montage (in most cases, we should not change this location).

Before you start the Montage installer, you must create a subfolder, C:\montage\config, and create two files within that folder.

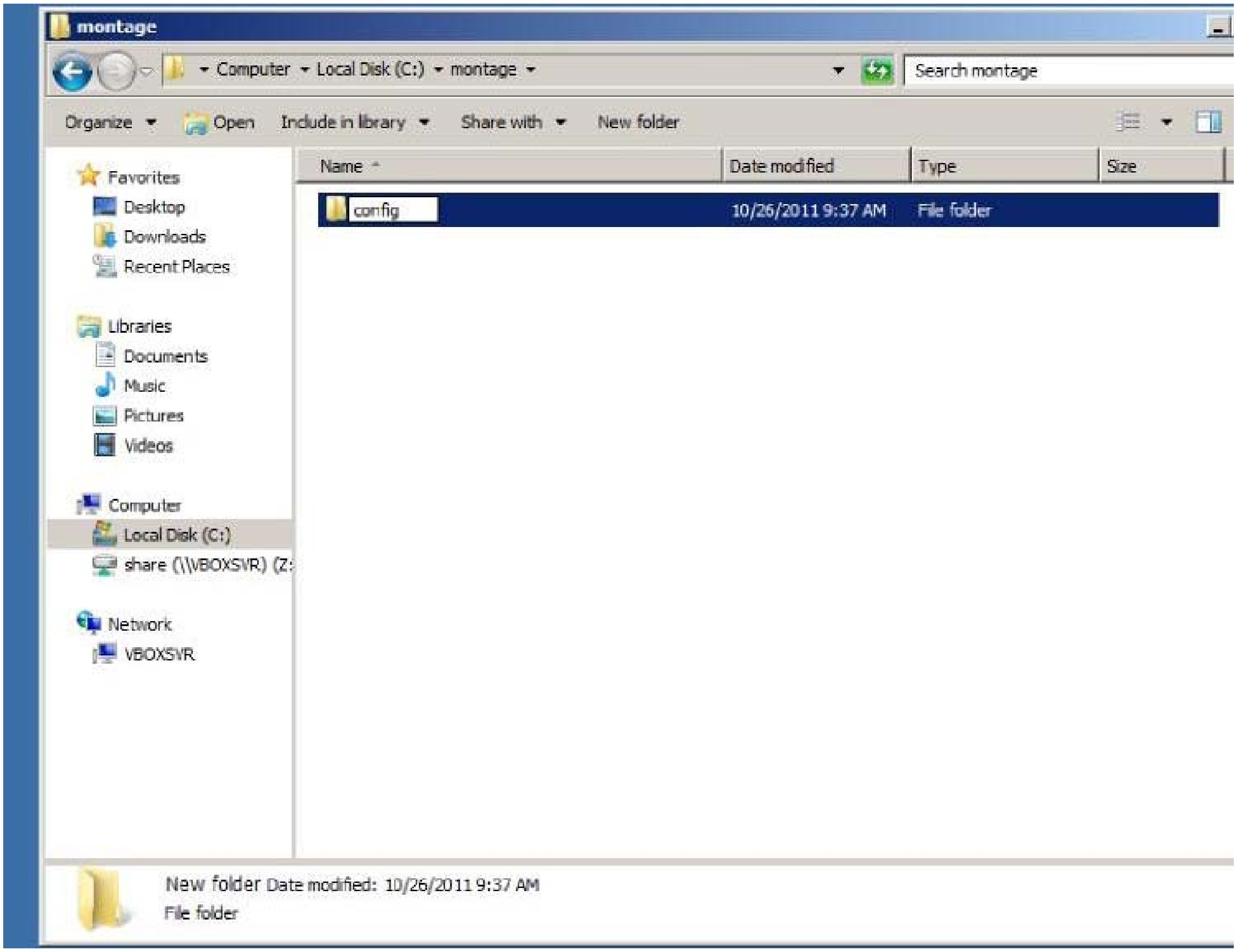
Create C:\montage:



Name	Date modified	Type	Size
PerfLogs	7/13/2009 8:20 PM	File folder	
Program Files	10/13/2011 8:08 AM	File folder	
Program Files (x86)	10/20/2011 1:32 PM	File folder	
Python27	10/20/2011 12:05 PM	File folder	
Users	10/20/2011 12:25 PM	File folder	
Windows	10/20/2011 1:26 PM	File folder	
montage	10/26/2011 9:37 AM	File folder	

New folder Date modified: 10/26/2011 9:37 AM
File folder

Create C:\montage\config



montage-modules.json - License

Note: Do not share or re-use license files.

Montage Healthcare Solutions issues a unique license for each customer.

The license file, montage-modules.json, includes the customer’s name, a list of modules which that customer has purchased access to (at the current time, Montage ships all production-ready modules to all customers), and potentially a license expiration date. The license file includes cryptographic hashes to prevent manual editing.

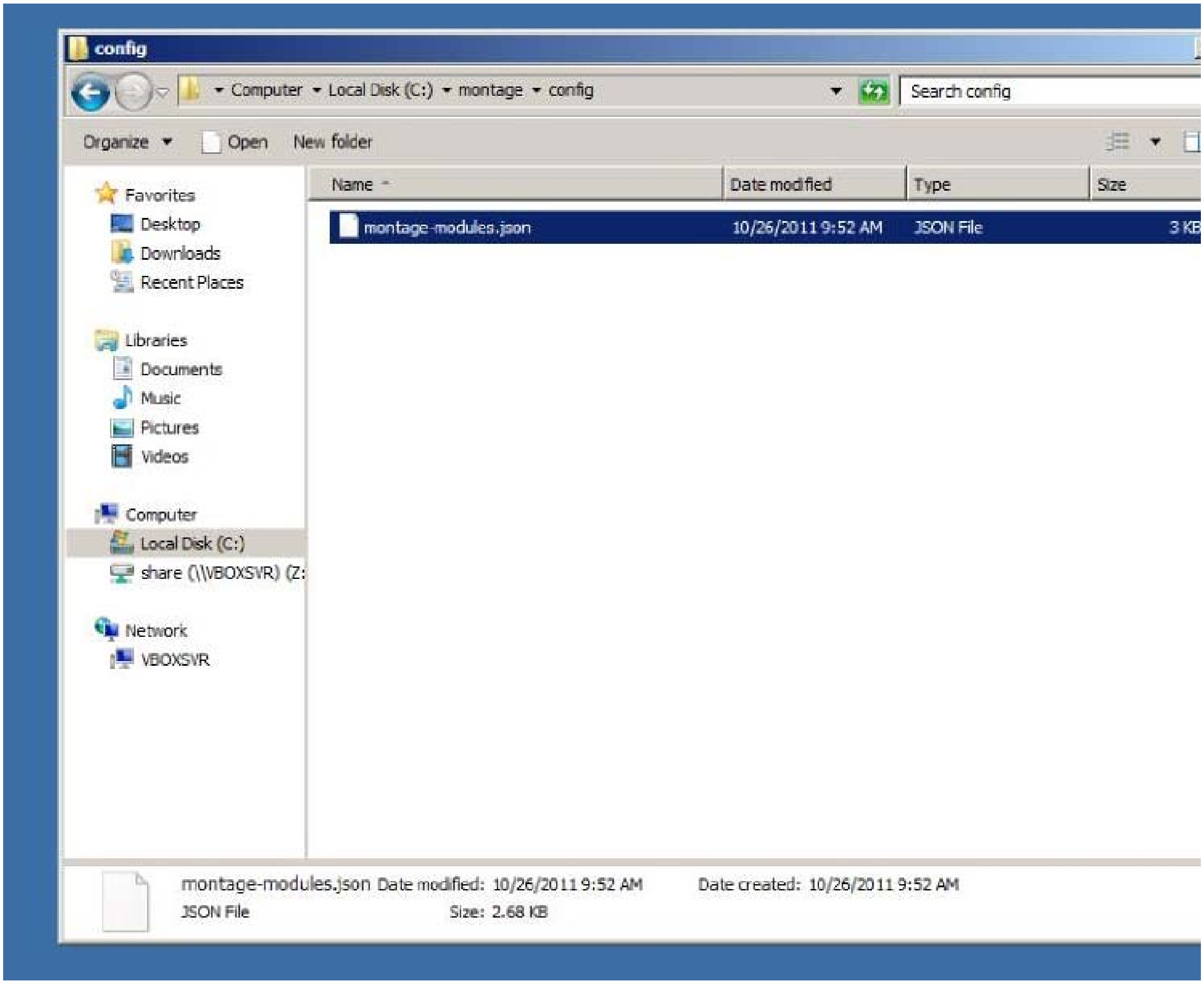
The file looks something like:

```
 {
   "expires": "2011-11-01",
   "format": "1.0",
   "modules": {
     "montage_accounts": "XXXXX",
     "montage_analytics": "XXXXX",
     ...
   },
   "organization": "Example Customer",
   "signature": "XXXXX"
}
```

Warning: Do not edit the license file, doing so will likely invalidate the license file. If any changes to the license, contact Montage Healthcare Solutions to issue a new license file. Even editing the customer name will cause license invalidation.

Modifying the SECRET_KEY in settings.py can also invalidate the license.

The PM will provide you a unique license file and SECRET_KEY for the customer. Place the montage-modules.json in the config directory (e.g. at C:\montage\config\montage-modules.json).



Name	Date modified	Type	Size
montage-modules.json	10/26/2011 9:52 AM	JSON File	3 KB

montage-modules.json Date modified: 10/26/2011 9:52 AM Date created: 10/26/2011 9:52 AM
JSON File Size: 2.68 KB

Ensure that the file extension is .json and not .txt (in case you used Notepad to save the license file). settings.py - Main Config File

Inside the config folder are stored the settings.py, which contains the database connection information, the customer's SECRET_KEY, crawling settings, and various other customer-specific settings. See Settings for a more comprehensive guide on what settings.py can contains.

To get the installation process started, settings.py should contain a SECRET_KEY, a basic definition of an index, and the email settings:

```
from montage_basesite.windows_settings import *

SECRET_KEY = ’XXXXX’
MONTAGE_NUANCE_AUTH_KEY = ’YYYYY’
```

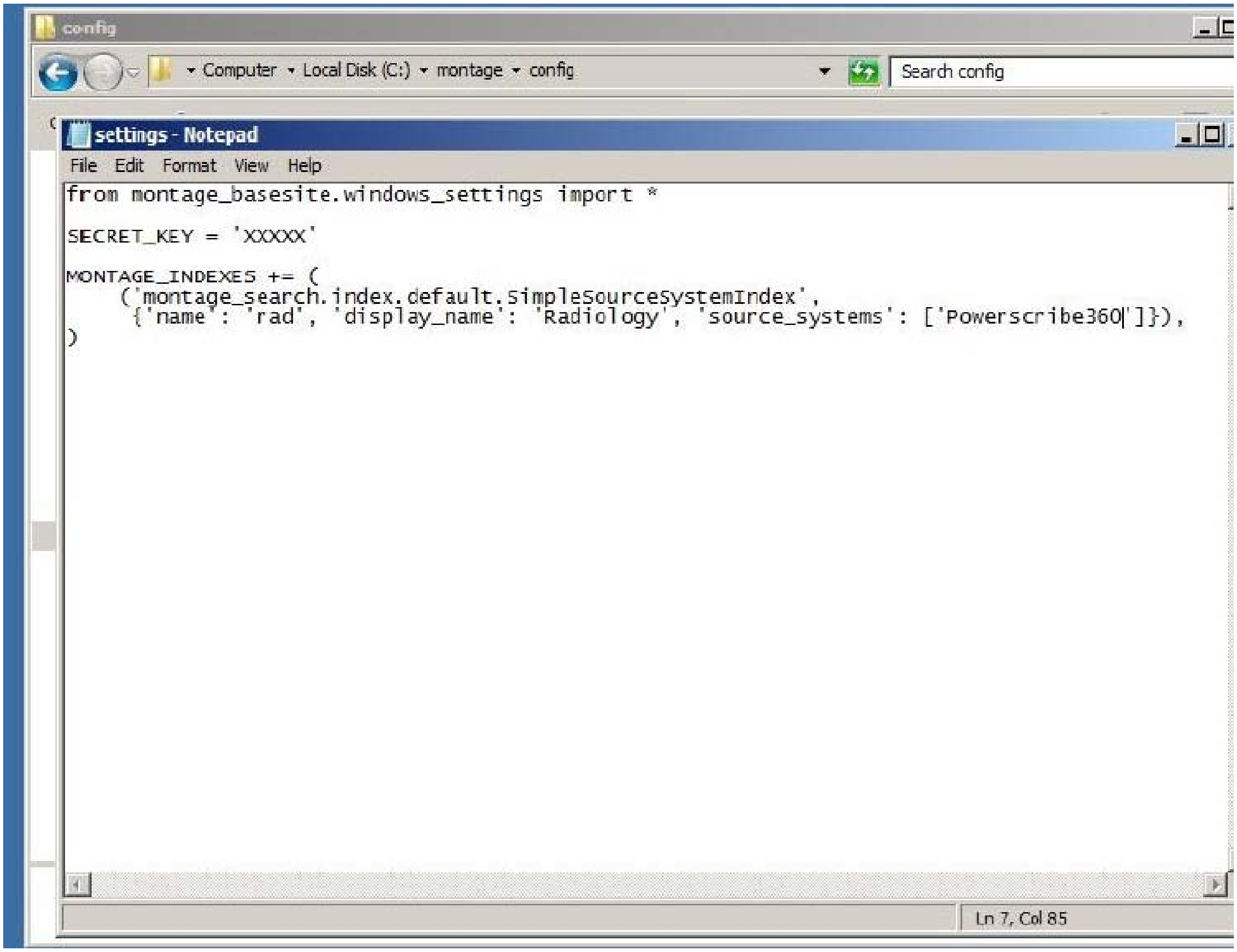
```
MONTAGE_INDEXES += (
   (’montage_search.index.default.RadiologyIndex’, {
     ’name’: ’rad’,
     ’display_name’: ’Radiology’,
     ’source_systems’: [’Powerscribe360’]
   }),
)

from celery.schedules import crontab
from datetime import timedelta
import urllib
CELERYBEAT_SCHEDULE[’ps360’] = {
   ’task’: ’montage_importer.tasks.import_recent_reports’,
   ’schedule’: crontab(hour=1, minute=0),
   ’kwargs’: {
     ’importer’:
     ’montage_importer.importers.vendor.nuance.Powerscribe360’,
     ’params’: {
        ’source_system’: ’Powerscribe360’,
                 ’db_url’: ’mssql+pyodbc:///?odbc_connect=’ +
                 urllib.quote_plus(’DRIVER={SQL Server};SERV
        ’timezone’: ’US/Eastern’
     },
     ’offset’: timedelta(days=2),
  },
}
```

A basic description of this example:

- The initial from ... import * line uses an existing settings template that allows us to only define the minimal set of configuration values.
- The SECRET_KEY is used to check the license file and to secure content in the Montage application. You should obtain the SECRET_KEY from Montage Healthcare Solutions.
- The MONTAGE_NUANCE_AUTH_KEY is used to auto-login users from PowerScribe 360 into Montage. This key is the same one used in the RadPortal as the Montage Secret Key
- The MONTAGE_INDEXES defines a single Index, which is connected to. Powerscribe360 Source Sys¬tem. The name and display_name govern what this Index is called within the Montage webpage. The source_systems is a mapping to all the systems that are crawled by Montage, which make up this specific index. In general, this definition of MONTAGE_INDEXES is sufficient. Note the name of the source system, Powerscribe360 in this case–it must match our crawler definition later.

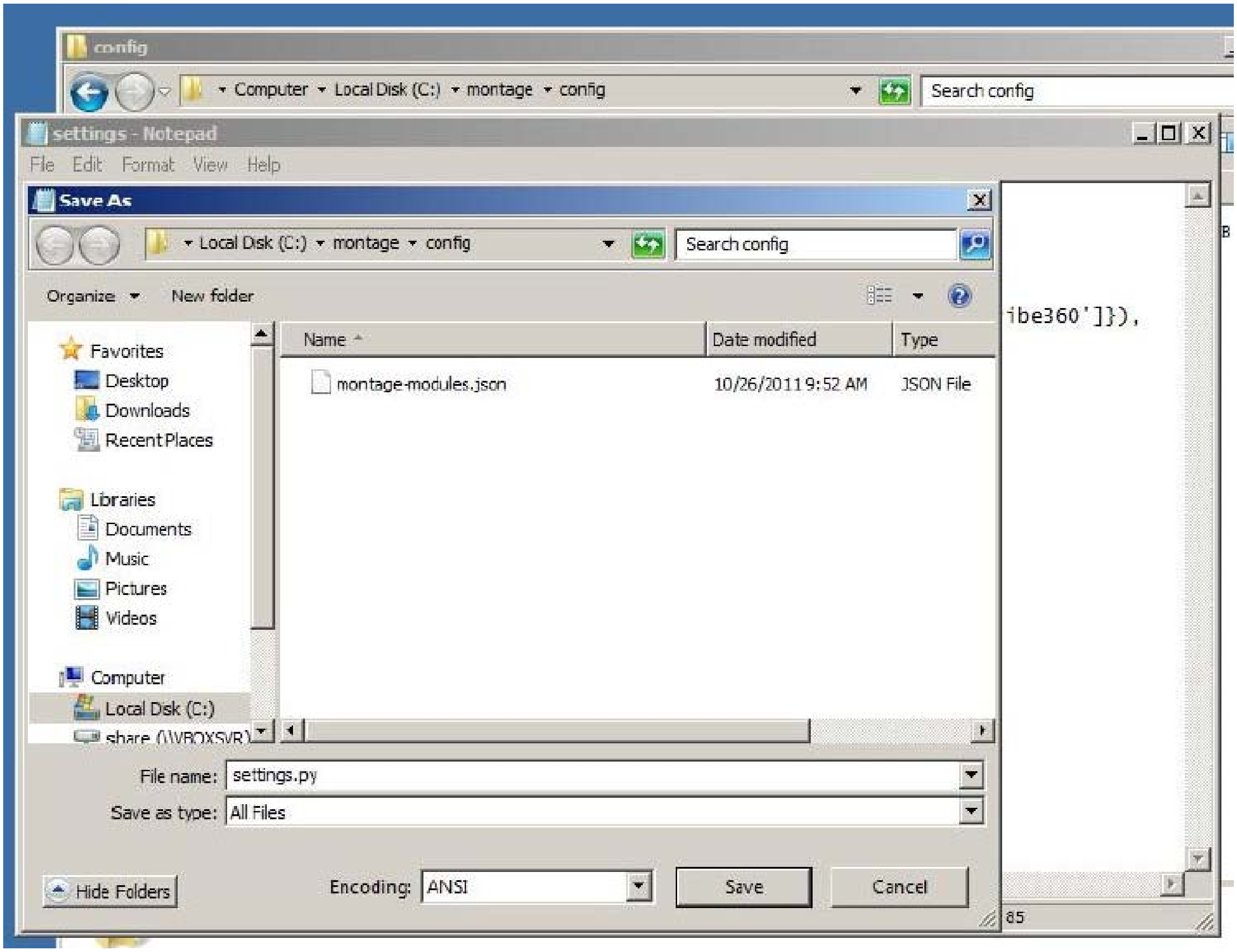
- In this example, we are configuring the Nuance PowerScribe360 crawler to run every day at 1:00 AM. Refer to General Crawler Configuration for specific instructions on setting up the CELERYBEAT_SCHEDULE. Make sure to configure the correct ’timezone’ for the given customer.

If a non-default PostgreSQL database / user / password was set in Create the PostgreSQL User & Database, they must be configured now. Likewise, if using a non-standard data directory, it must be configured.


config
Computer ▸ Local Disk (C:) ▸ montage ▸ config
Search config
settings - Notepad
File Edit Format View Help
Ln 7, Col 85

```
from montage_basesite.windows_settings import *

SECRET_KEY = 'XXXXX'

MONTAGE_INDEXES += (
    ('montage_search.index.default.SimpleSourceSystemIndex',
     {'name': 'rad', 'display_name': 'Radiology', 'source_systems': ['Powerscribe360']}),
)
```

Ensure that the file extension is .py and not .txt if you used Notepad to save the file.



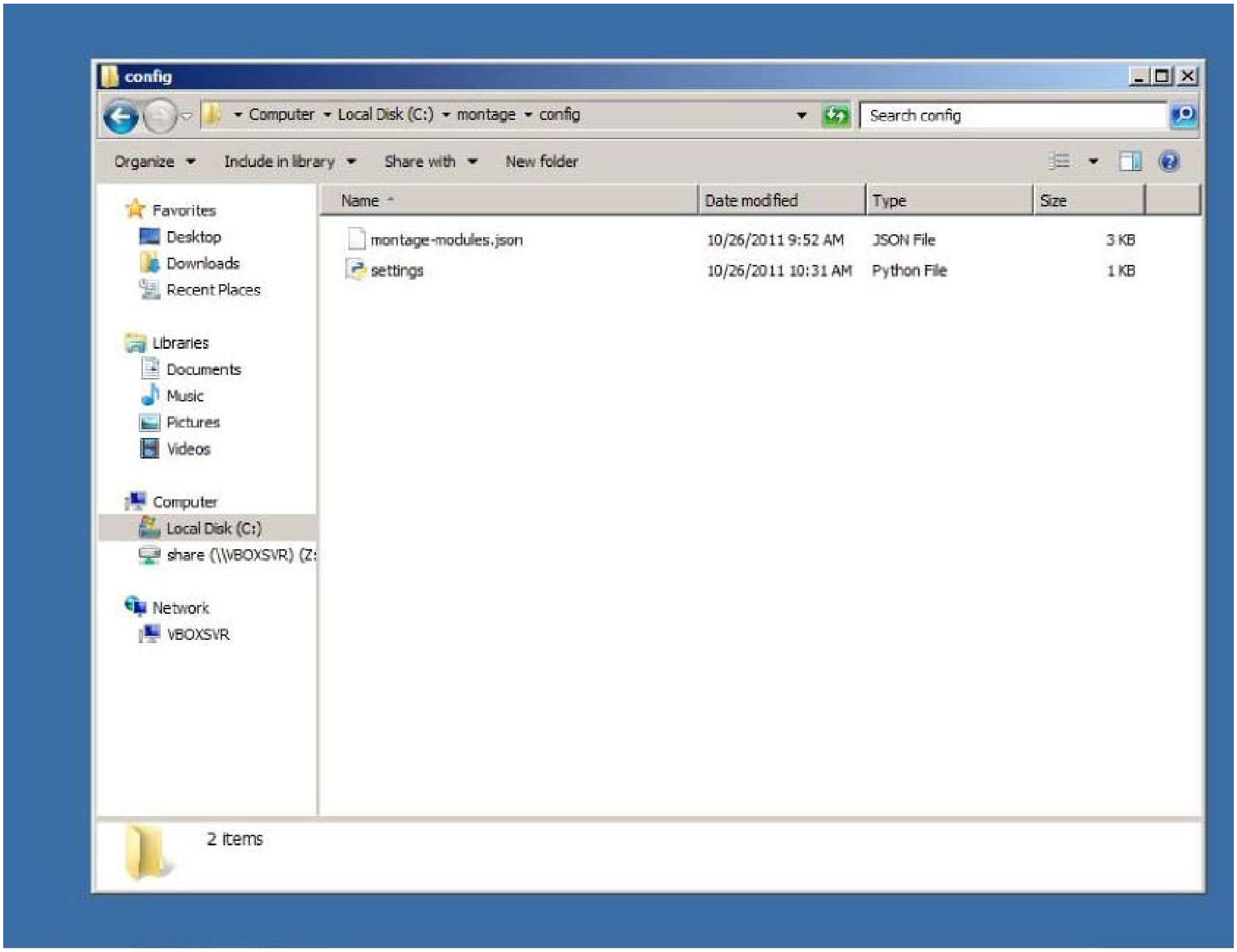
Name	Date modified	Type
montage-modules.json	10/26/2011 9:52 AM	JSON File

File name: settings.py

Save as type: All Files

Encoding: ANSI

C:\montage\config should appear as:



Name	Date modified	Type	Size
montage-modules.json	10/26/2011 9:52 AM	JSON File	3 KB
settings	10/26/2011 10:31 AM	Python File	1 KB

2 items

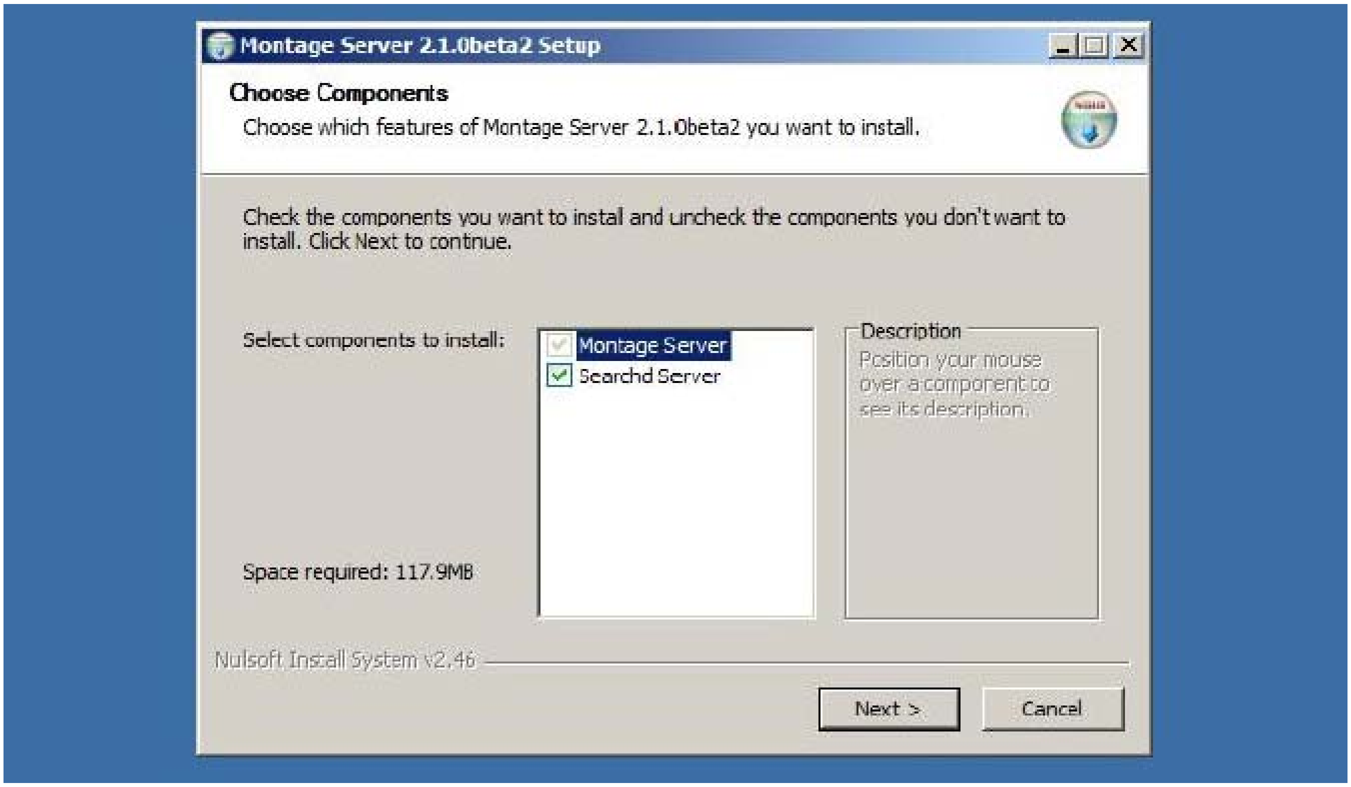
Montage Installation

Montage Installer

Having finished the Dependency Installation and Initial Configuration, we are ready to run the Montage installer, montage-VERSION.exe.

Unless you are upgrading, you should install both the Montage Server and the Searchd Server.

Click **Next**.



Montage Server 2.1.0beta2 Setup

Choose Components

Choose which features of Montage Server 2.1.0beta2 you want to install.

Check the components you want to instal and uncheck the components you don't want to install. Click Next to continue.

Select components to install:

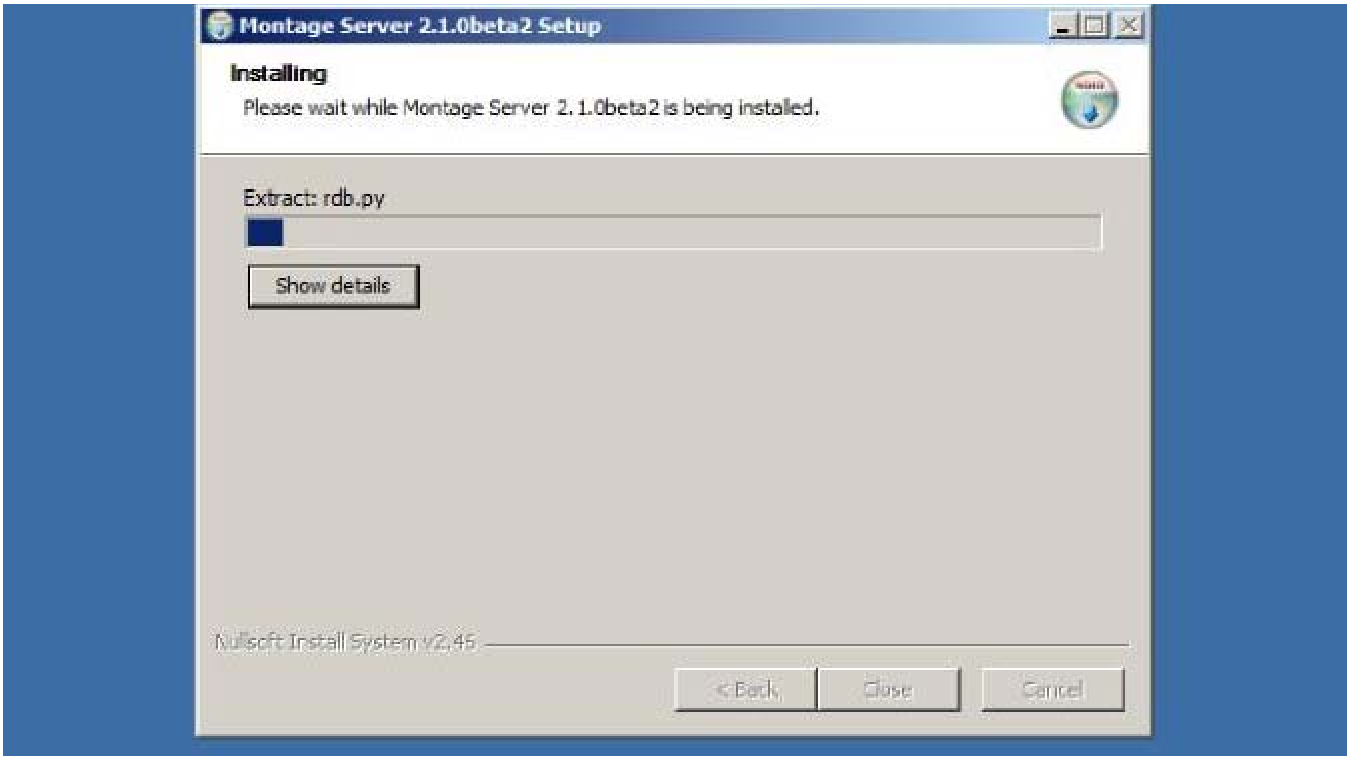
☑ Montage Server
☑ Searchd Server

Description

Position your mouse over a component to see its description.

Space required: 117.9MB

The installer will take a few minutes:



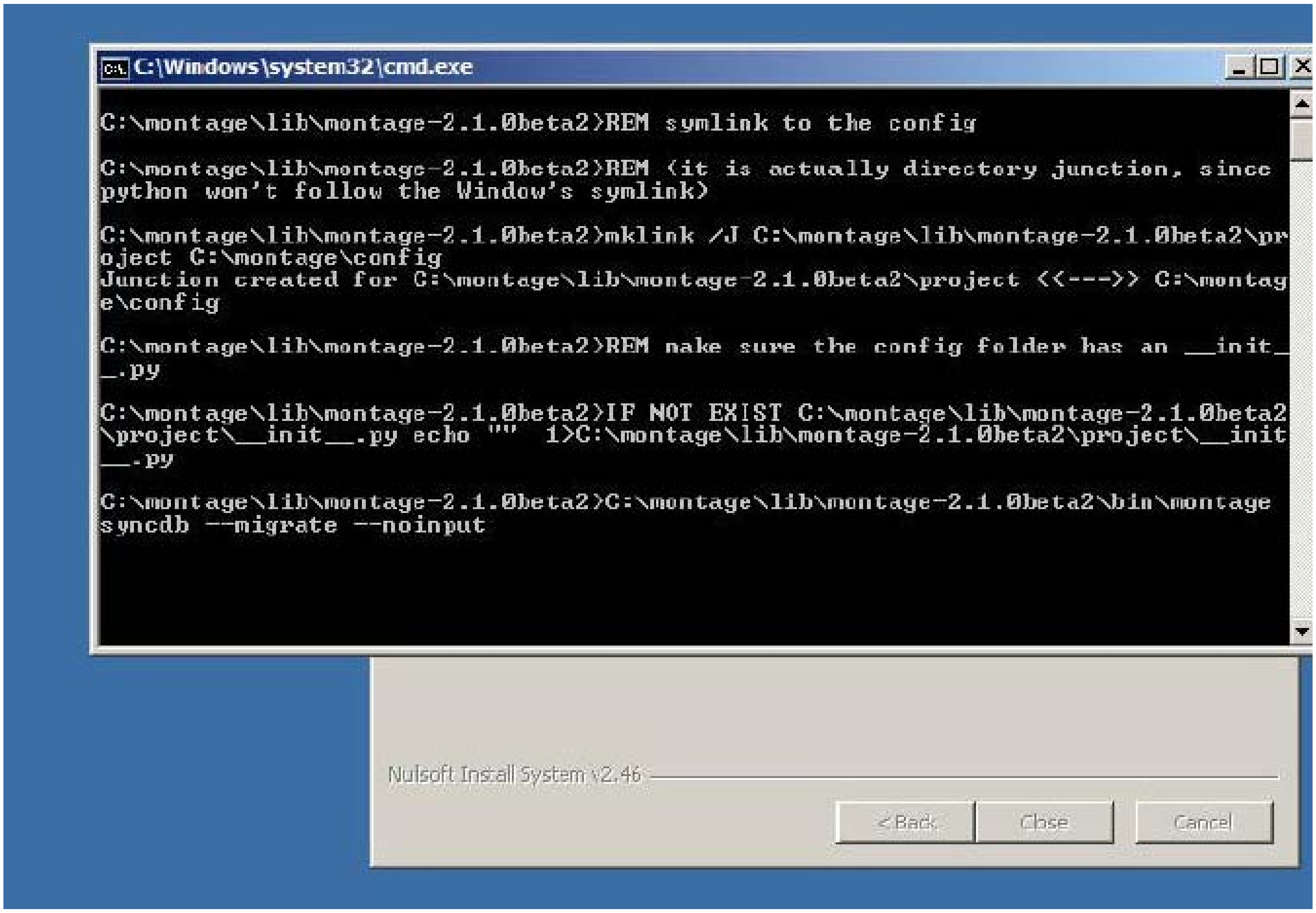
Montage Server 2.1.0beta2 Setup

Installing

Please wait while Montage Server 2.1.0beta2 is being installed.

Extract: rdb.py

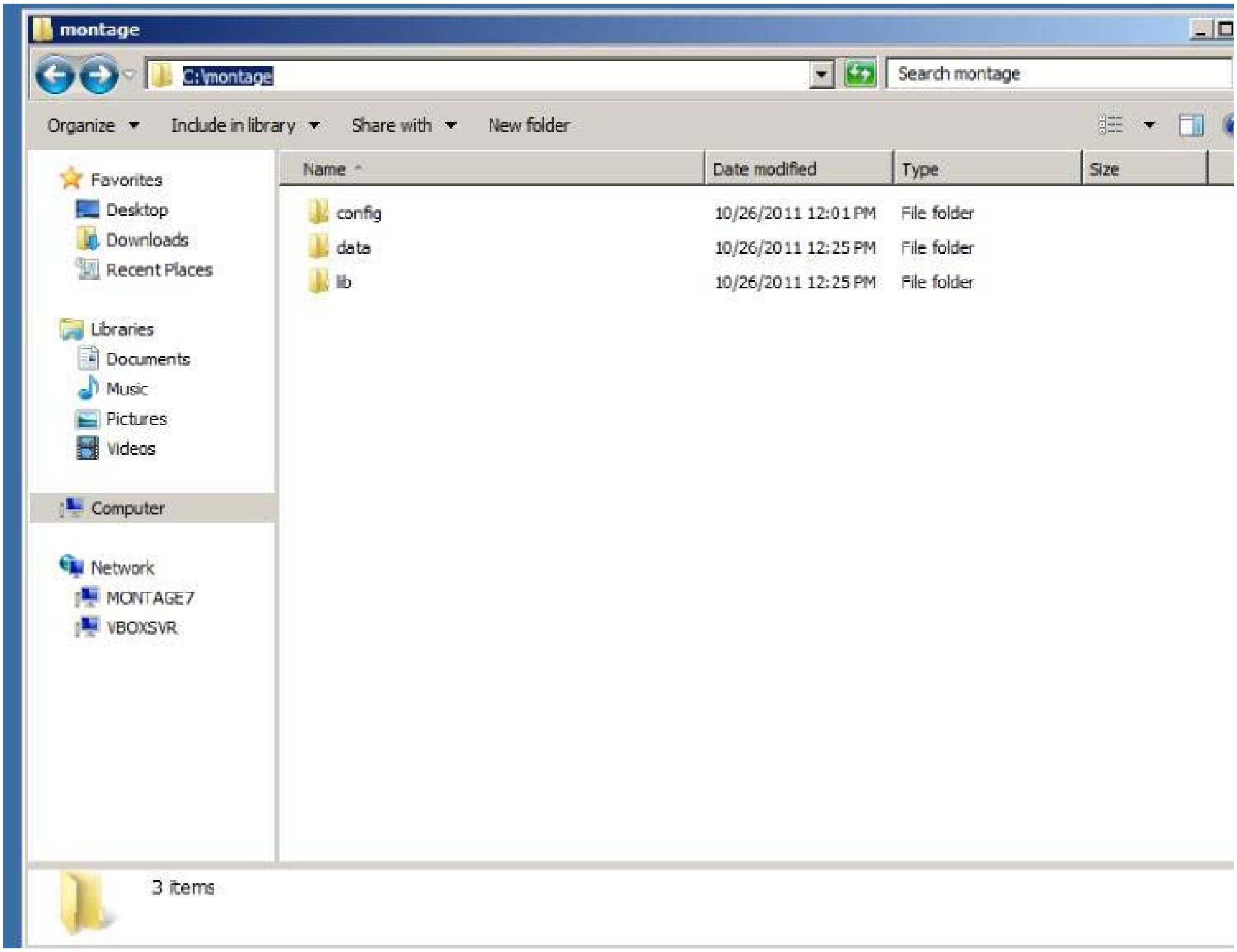
A command window will open to run montage-setup.bat, which creates the tables in the montage database, generates config\searchd.conf, and loads static data into the database (like RadLex terms). Do not press any keys, let the batch file complete and automatically close (it may take several minutes to complete).



```
C:\montage\lib\montage-2.1.0beta2>REM symlink to the config

C:\montage\lib\montage-2.1.0beta2>REM (it is actually directory junction, since
python won't follow the Window's symlink)

C:\montage\lib\montage-2.1.0beta2>mklink /J C:\montage\lib\montage-2.1.0beta2\pr
oject C:\montage\config
Junction created for C:\montage\lib\montage-2.1.0beta2\project <<===>> C:\montag
e\config

C:\montage\lib\montage-2.1.0beta2>REM nake sure the config folder has an __init_
_.py

C:\montage\lib\montage-2.1.0beta2>IF NOT EXIST C:\montage\lib\montage-2.1.0beta2
\project\__init__.py echo ""  1>C:\montage\lib\montage-2.1.0beta2\project\__init
__.py

C:\montage\lib\montage-2.1.0beta2>C:\montage\lib\montage-2.1.0beta2\bin\montage
syncdb --migrate --noinput
```

When completed, click **Close**

The installer will create several directories in the base install directory:



C:\montage

Name	Date modified	Type	Size
config	10/26/2011 12:01 PM	File folder	
data	10/26/2011 12:25 PM	File folder	
lib	10/26/2011 12:25 PM	File folder	

3 items

Directory Structure

C:\montage

lib - The libraries that run Montage
searchd - VERSION - The binaries to run the Searchd server
montage - VERSION - The Montage Server files (HTML, Python, etc)
data - Data files (this directory can live on another partition, but requires customizing file locations in the settings
|cache - Montage heavily caches data to avoid hitting slower network resources (like the database). Cached fragments sit in this folder.
index - Files created by the Indexer, which Searchd loads and provides results from
logs - Application logs, includes usage, audit events, and errors. See Montage Log Files.
media - Static files uploaded by users to the site
static - Montage combines and minifies static resources like JS and CSS files, it stores the minified resources in this folder

Installed Services

The Montage installer will create 4 new Windows Services.

Montage Searchd is a server which provides quick access to the index files.

Montage Celeryd is an endpoint for the task queue, RabbitMQ. Essentially, it is the worker that takes tasks on the queue and executes them asynchronously.

Montage Celerybeat is a specialized version of Montage Celeryd that runs periodic tasks.

Montage MLLP Server is an HL7 receiver, turned off by default

To verify the service are running, open the Services tool via Start -+ Administrative Tools -+ Services.

These services will not be running at this point. Montage search will not start until the indexing schedule task runs as pointed out in the next section.

Indexing Scheduled Task

The Montage installer will create 1 new Scheduled Tasks, Montage Indexer, which, by default is set to run at 2AM daily. It will regenerate the index files from the most recent crawler run.

Note: In future versions of Montage, the Montage Celeryd and Celerybeat tasks will be turned into Services. Cur¬rently, the tasks simply run the appropriate programs on boot.

Next Steps

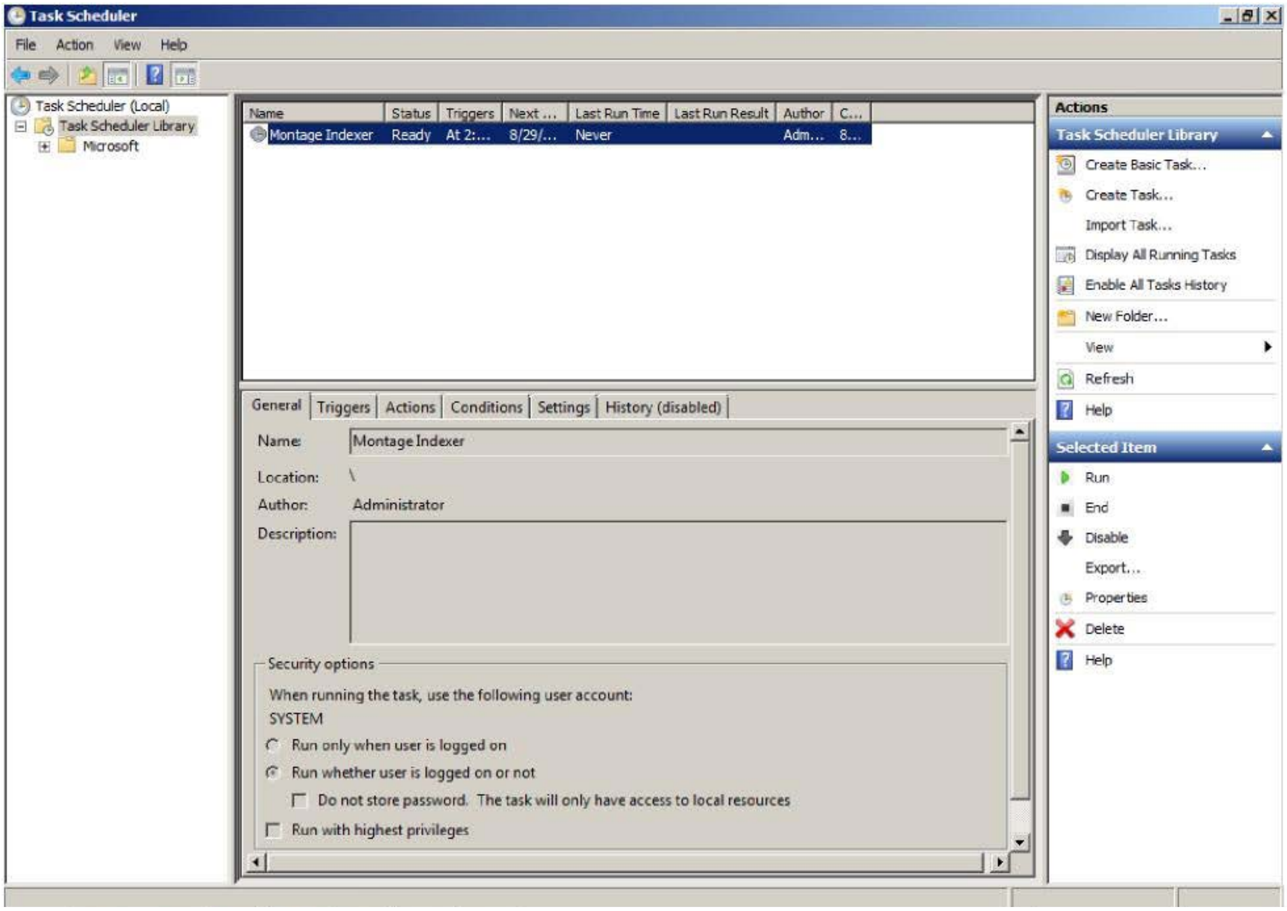
Continue to the Post Installation Configuration to perform the final installation steps and to start the initial data load.

Post Installation Configuration

Build the Index Files

In order for the Montage Searchd Service to work, the index files must be present. These files are built via the nightly Montage Indexer Scheduled Task. To avoid waiting until the next nightly run of the Montage Indexer, we can manually run the Scheduled Task: Start -+ Administrative Tools -+ Task Scheduler -+ Task Scheduler Library

Click on the Montage Indexer task. It should be in the Ready state. In the right bar, click Run.



Name	Status	Triggers	Next ...	Last Run Time	Last Run Result	Author	C...
Montage Indexer	Ready	At 2:...	8/29/...	Never		Adm...	8...

Name: Montage Indexer

Location: \

Author: Administrator

Description:

Security options

When running the task, use the following user account:

SYSTEM

○ Run only when user is logged on

● Run whether user is logged on or not

□ Do not store password. The task will only have access to local resources

□ Run with highest privileges

If you click Refresh, the task will briefly be in the Running state.

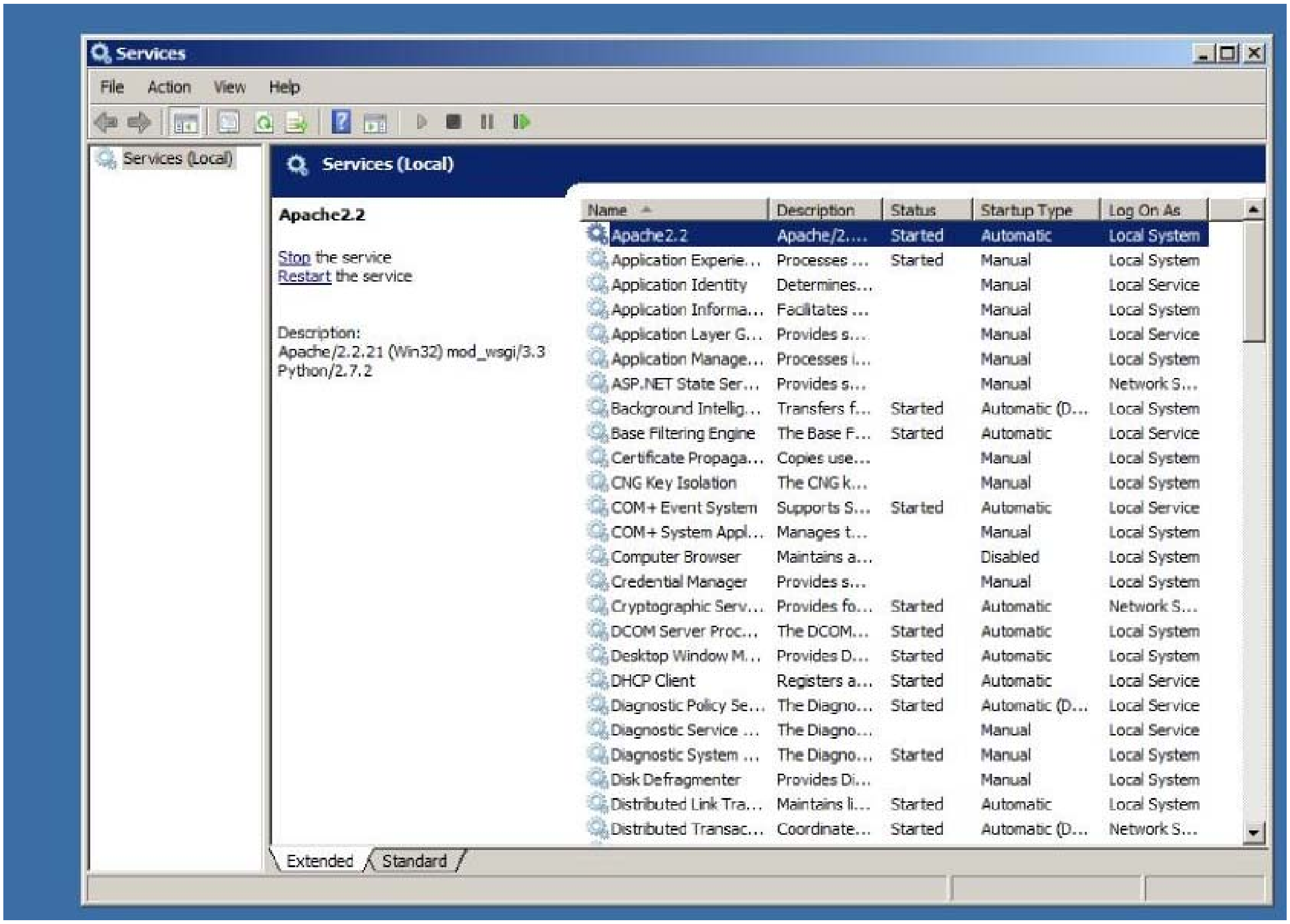
Wait for the task to return to the Ready state (for the initial index file build, when no data has been crawled, this should only take several seconds, once the crawl is finished this can take 20 minutes to an hour). The state is not automatically refreshed, therefore you may need to repeatedly click **Refresh**.

Once the Montage Indexer task is finished (task in Ready state and files present in <drive>:\montage\data\index\), we can proceed with turning on the services.

Start Services

We now have Montage installed, but we still need to link it to the Apache webserver, so HTTP requests get routed into the Montage Server.

To apply the Apache changes that occurred during the Montage installation, we must restart Apache via the Services interface: Start -+ Administrative Tools -+ Services.



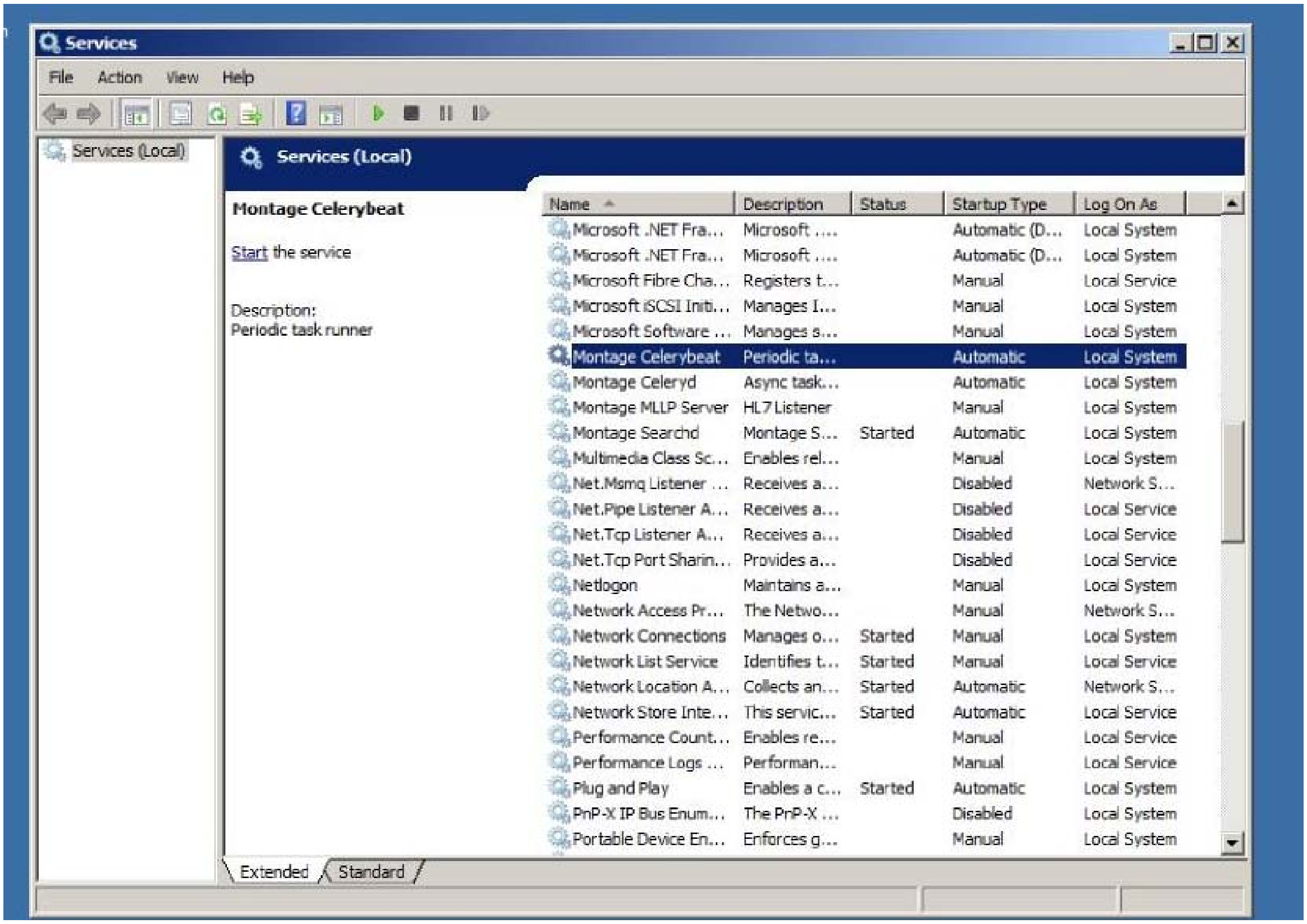
Apache2.2

Stop the service
Restart the service

Description:
Apache/2.2.21 (Win32) mod_wsgi/3.3 Python/2.7.2

Name	Description	Status	Startup Type	Log On As
Apache2.2	Apache/2....	Started	Automatic	Local System
Application Experie...	Processes ...	Started	Manual	Local System
Application Identity	Determines...		Manual	Local Service
Application Informa...	Facilitates ...		Manual	Local System
Application Layer G...	Provides s...		Manual	Local Service
Application Manage...	Processes i...		Manual	Local System
ASP.NET State Ser...	Provides s...		Manual	Network S...
Background Intellig...	Transfers f...	Started	Automatic (D...	Local System
Base Filtering Engine	The Base F...	Started	Automatic	Local Service
Certificate Propaga...	Copies use...		Manual	Local System
CNG Key Isolation	The CNG k...		Manual	Local System
COM+ Event System	Supports S...	Started	Automatic	Local Service
COM+ System Appl...	Manages t...		Manual	Local System
Computer Browser	Maintains a...		Disabled	Local System
Credential Manager	Provides s...		Manual	Local System
Cryptographic Serv...	Provides fo...	Started	Automatic	Network S...
DCOM Server Proc...	The DCOM...	Started	Automatic	Local System
Desktop Window M...	Provides D...	Started	Automatic	Local System
DHCP Client	Registers a...	Started	Automatic	Local Service
Diagnostic Policy Se...	The Diagno...	Started	Automatic (D...	Local Service
Diagnostic Service ...	The Diagno...		Manual	Local Service
Diagnostic System ...	The Diagno...	Started	Manual	Local System
Disk Defragmenter	Provides Di...		Manual	Local System
Distributed Link Tra...	Maintains li...	Started	Automatic	Local System
Distributed Transac...	Coordinate...	Started	Automatic (D...	Network S...

Check that the Montage Searchd, Montage Celeryd, and Montage Celerybeat services are running. If they are stopped, start them. Only should start the Montage MLLP Server if it Montage is receiving HL7 messages.



Montage Celerybeat

Start the service

Description:
Periodic task runner

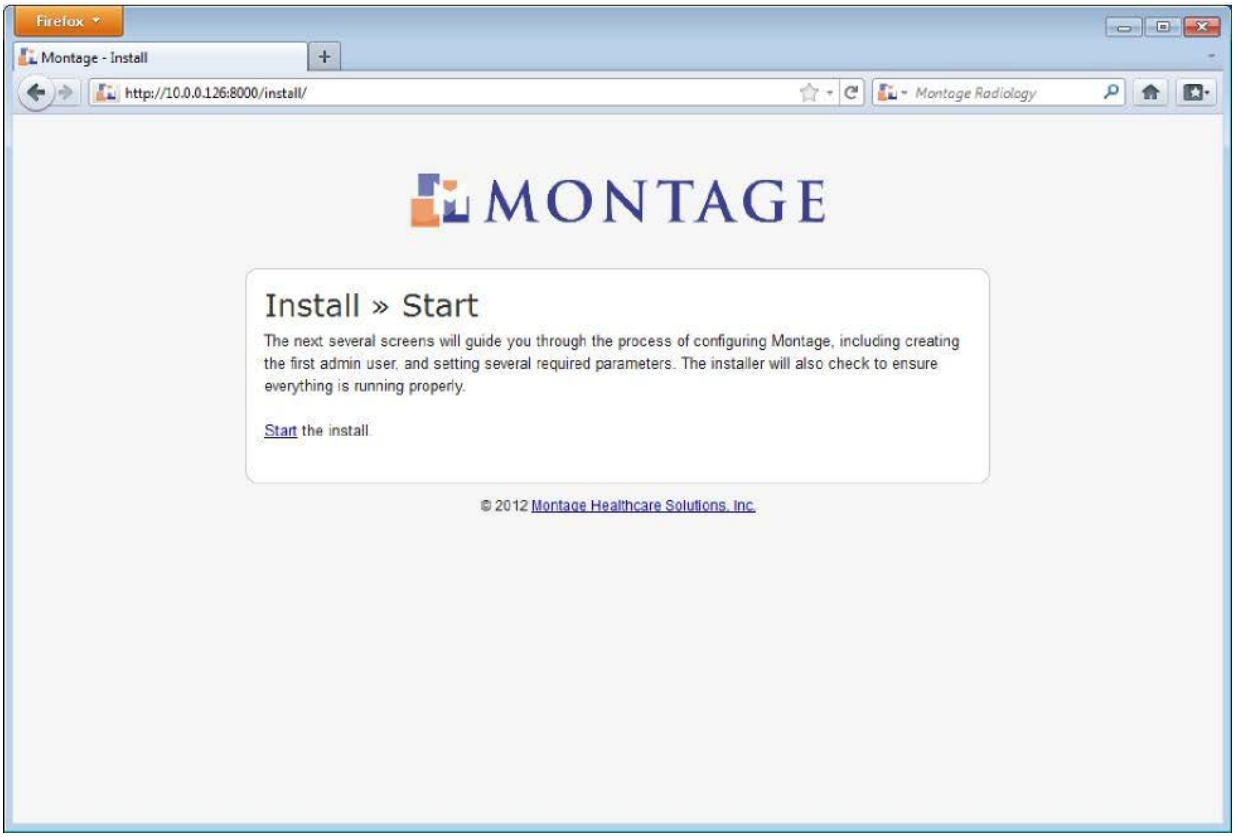
Name	Description	Status	Startup Type	Log On As
Microsoft .NET Fra...	Microsoft		Automatic (D...	Local System
Microsoft .NET Fra...	Microsoft		Automatic (D...	Local System
Microsoft Fibre Cha...	Registers t...		Manual	Local Service
Microsoft iSCSI Initi...	Manages I...		Manual	Local System
Microsoft Software ...	Manages s...		Manual	Local System
Montage Celerybeat	Periodic ta...		Automatic	Local System
Montage Celeryd	Async task...		Automatic	Local System
Montage MLLP Server	HL7 Listener		Manual	Local System
Montage Searchd	Montage S...	Started	Automatic	Local System
Multimedia Class Sc...	Enables rel...		Manual	Local System
Net.Msmq Listener ...	Receives a...		Disabled	Network S...
Net.Pipe Listener A...	Receives a...		Disabled	Local Service
Net.Tcp Listener A...	Receives a...		Disabled	Local Service
Net.Tcp Port Sharin...	Provides a...		Disabled	Local Service
Netlogon	Maintains a...		Manual	Local System
Network Access Pr...	The Netwo...		Manual	Network S...
Network Connections	Manages o...	Started	Manual	Local System
Network List Service	Identifies t...	Started	Manual	Local Service
Network Location A...	Collects an...	Started	Automatic	Network S...
Network Store Inte...	This servic...	Started	Automatic	Local Service
Performance Count...	Enables re...		Manual	Local Service
Performance Logs ...	Performan...		Manual	Local Service
Plug and Play	Enables a c...	Started	Automatic	Local System
PnP-X IP Bus Enum...	The PnP-X ...		Disabled	Local System
Portable Device En...	Enforces g...		Manual	Local System

Note: Whenever there is a configuration change (e.g. to C:\montage\config\settings.py), the services (Apache 2.2, Montage Celeryd, Montage Celerybeat, and optionally Montage MLLP Server) must be restarted to reload the configuration file.

Web Configuration

The Montage server features a web-based process for creating the initial admin account and configuring several vital settings. A number of checks will also be run as part of this process to identify common installation problems.

Using the domain we obtained as part of the Pre-Install Checklist, go the URL http://<site's domain>/install/



Install » Start

The next several screens will guide you through the process of configuring Montage, including creating the first admin user, and setting several required parameters. The installer will also check to ensure everything is running properly.

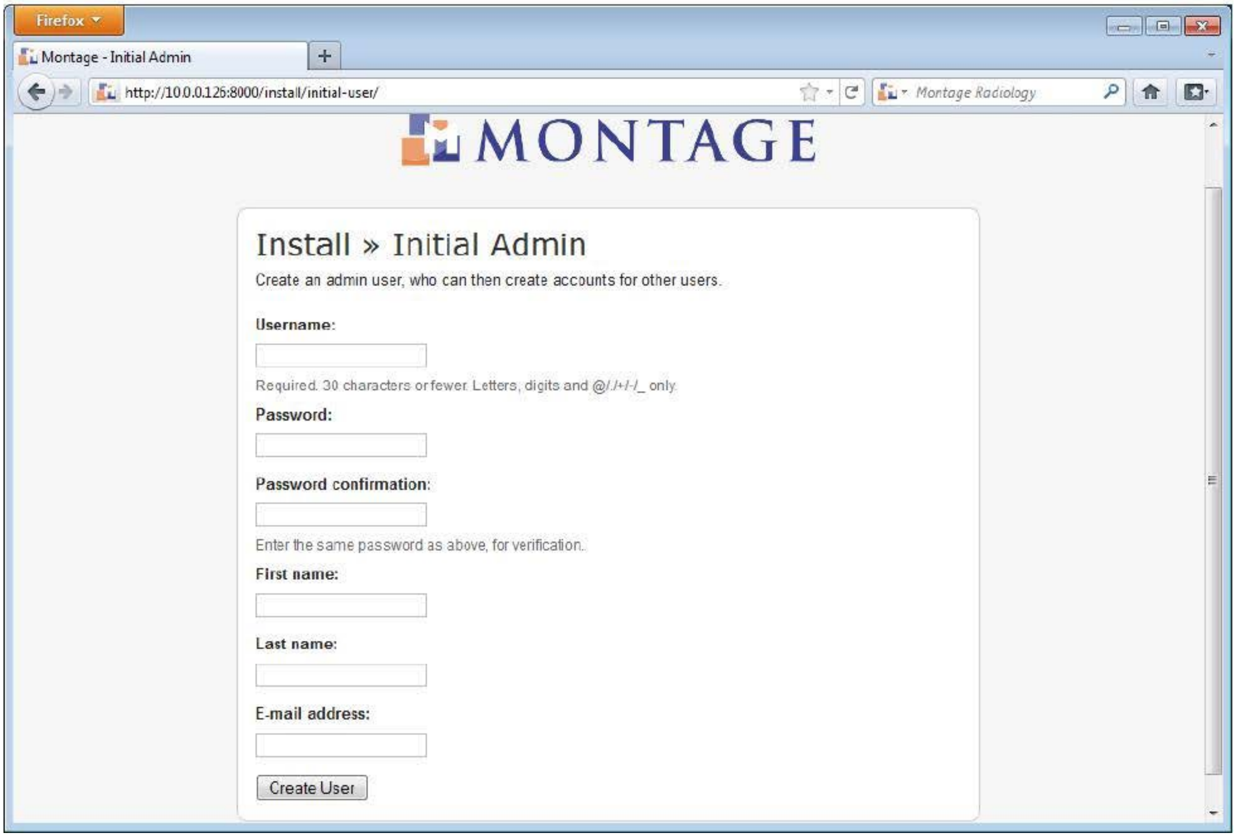
Start the install.

© 2012 Montage Healthcare Solutions, Inc.

Click the Start link.

If no admin user has been previous created, you are prompted to create this user. Once the account information is completed, click **Create User**.

The PM should provide you the account name and Password based on the customers requirements.



Install » Initial Admin

Create an admin user, who can then create accounts for other users.

Username:

Required. 30 characters or fewer. Letters, digits and @/./+/-/_ only.

Password:

Password confirmation:

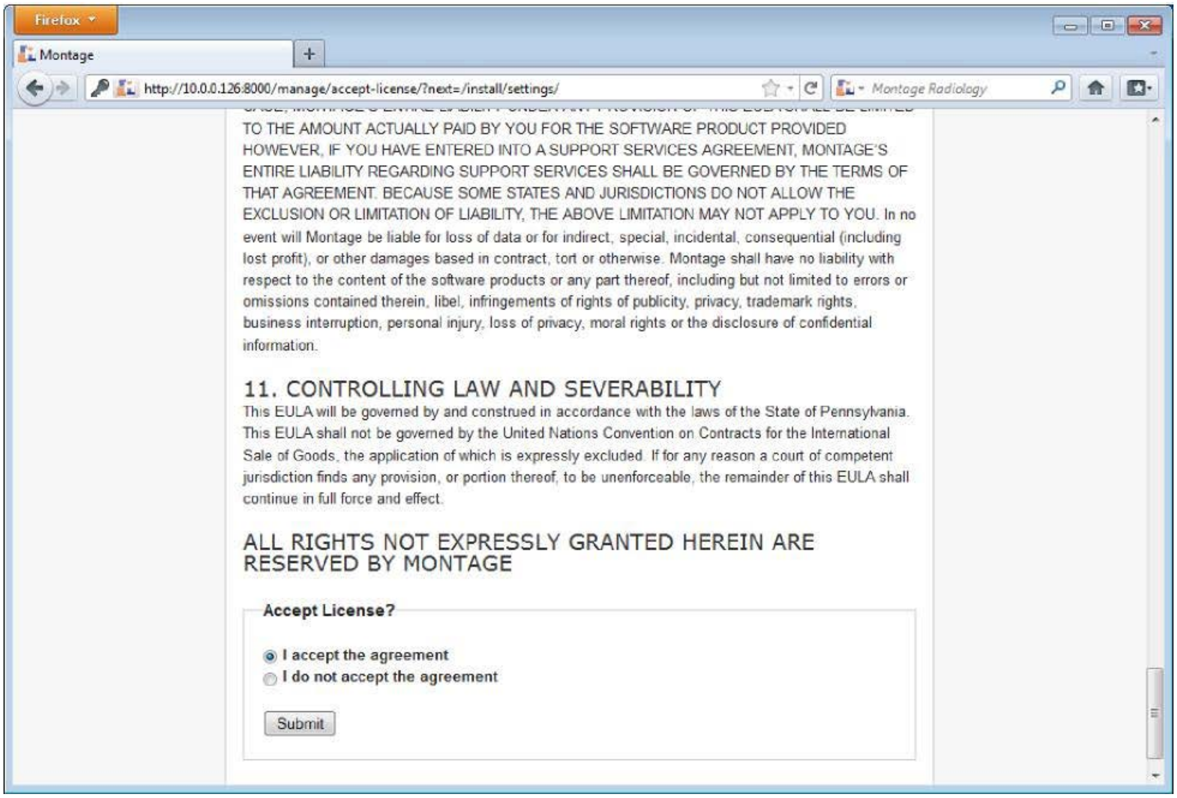
Enter the same password as above, for verification.

First name:

Last name:

E-mail address:

You will see the Montage EULA. Read the agreement, select I accept the agreement, and click **Submit**.


Firefox
Montage
http://10.0.0.126:8000/manage/accept-license/?next=/install/settings/
Montage Radiology

TO THE AMOUNT ACTUALLY PAID BY YOU FOR THE SOFTWARE PRODUCT PROVIDED HOWEVER, IF YOU HAVE ENTERED INTO A SUPPORT SERVICES AGREEMENT, MONTAGE'S ENTIRE LIABILITY REGARDING SUPPORT SERVICES SHALL BE GOVERNED BY THE TERMS OF THAT AGREEMENT. BECAUSE SOME STATES AND JURISDICTIONS DO NOT ALLOW THE EXCLUSION OR LIMITATION OF LIABILITY, THE ABOVE LIMITATION MAY NOT APPLY TO YOU. In no event will Montage be liable for loss of data or for indirect, special, incidental, consequential (including lost profit), or other damages based in contract, tort or otherwise. Montage shall have no liability with respect to the content of the software products or any part thereof, including but not limited to errors or omissions contained therein, libel, infringements of rights of publicity, privacy, trademark rights, business interruption, personal injury, loss of privacy, moral rights or the disclosure of confidential information.

11. CONTROLLING LAW AND SEVERABILITY

This EULA will be governed by and construed in accordance with the laws of the State of Pennsylvania. This EULA shall not be governed by the United Nations Convention on Contracts for the International Sale of Goods, the application of which is expressly excluded. If for any reason a court of competent jurisdiction finds any provision, or portion thereof, to be unenforceable, the remainder of this EULA shall continue in full force and effect.

ALL RIGHTS NOT EXPRESSLY GRANTED HEREIN ARE RESERVED BY MONTAGE

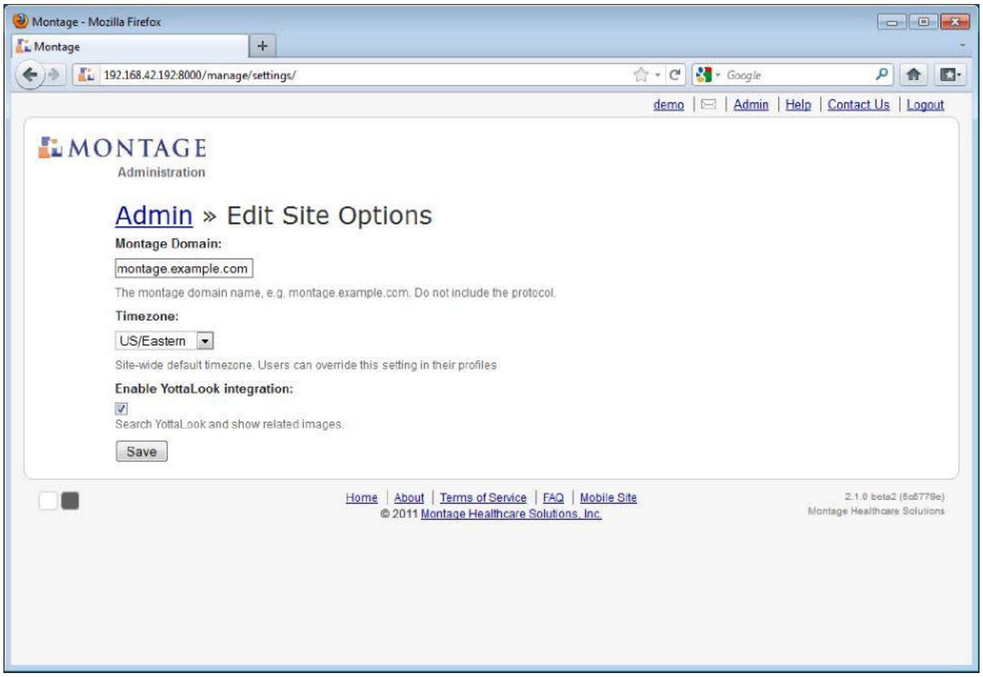
Accept License?

● I accept the agreement
○ I do not accept the agreement

Submit

You must tell Montage its domain, so that it can properly create links.

Enter the correct FQDN, server + domain name in the Montage Domain and click **Save**.



Admin » Edit Site Options

Montage Domain:

montage.example.com

The montage domain name, e.g. montage.example.com. Do not include the protocol.

Timezone:

US/Eastern

Site-wide default timezone. Users can override this setting in their profiles

Enable YottaLook integration:

☑

Search YottaLook and show related images.

Montage - Mozilla Firefox
Montage
192.168.42.192:8000/manage/settings/
Google
demo | Admin | Help | Contact Us | Logout
MONTAGE
Administration
Save
Home | About | Terms of Service | FAQ | Mobile Site
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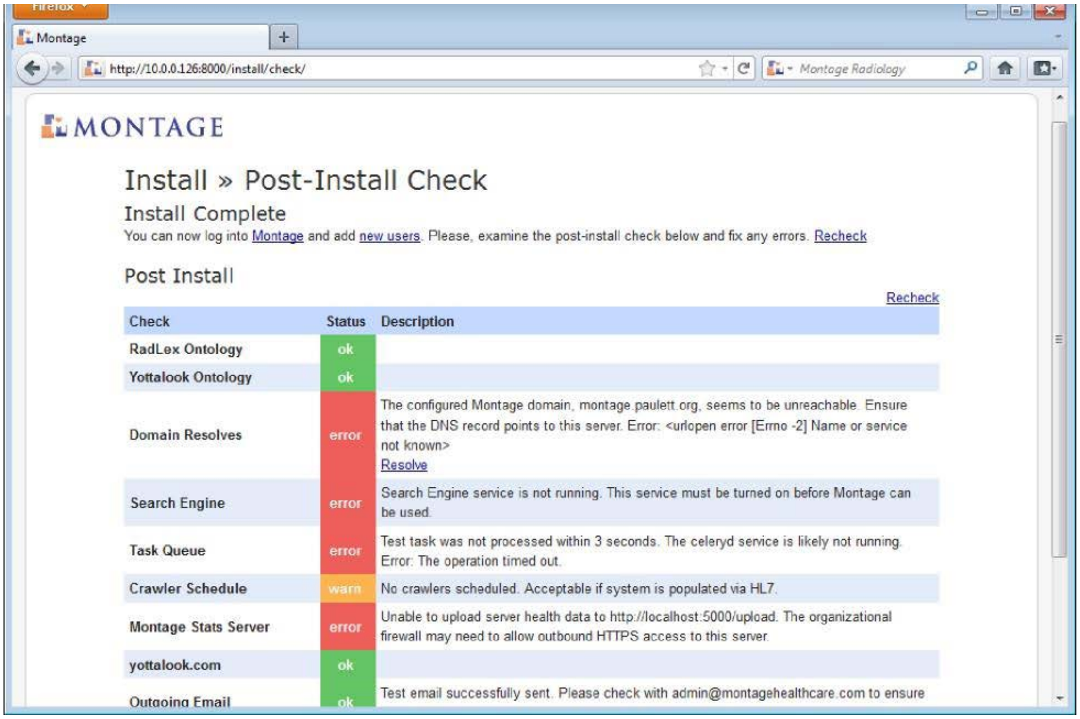
2.1.0 beta2 (6c6779e)
Montage Healthcare Solutions

Montage will run through a series of checks (it may take several minutes), to ensure the required services are running and that Montage is properly configured. If any checks result in errors or warnings, please follow the instructions or work with Montage Support to resolve the issues:



Install » Post-Install Check

Install Complete

You can now log into Montage and add new users. Please, examine the post-install check below and fix any errors. Recheck

Post Install

Recheck

Check	Status	Description
RadLex Ontology	ok	
Yottalook Ontology	ok	
Domain Resolves	error	The configured Montage domain, montage.paulett.org, seems to be unreachable. Ensure that the DNS record points to this server. Error: <urlopen error [Errno -2] Name or service not known> Resolve
Search Engine	error	Search Engine service is not running. This service must be turned on before Montage can be used.
Task Queue	error	Test task was not processed within 3 seconds. The celeryd service is likely not running. Error: The operation timed out.
Crawler Schedule	warn	No crawlers scheduled. Acceptable if system is populated via HL7.
Montage Stats Server	error	Unable to upload server health data to http://localhost:5000/upload. The organizational firewall may need to allow outbound HTTPS access to this server.
yottalook.com	ok	
Outgoing Email	ok	Test email successfully sent. Please check with admin@montagehealthcare.com to ensure

Next Steps

You have configured the base application at this point, the next step is to perform a historical crawl Initial Crawl.

The first crawl should not be done until instructed to do so by the PM. There may be no data, or only test data, that we do not want imported into Montage at this time. We may need to make edits to the settings file depending on what the PS360 discovery scripts returned. Do not configure the setting file with ps360 info until you are ready to do the initial crawl, so it does not take off on it's own.

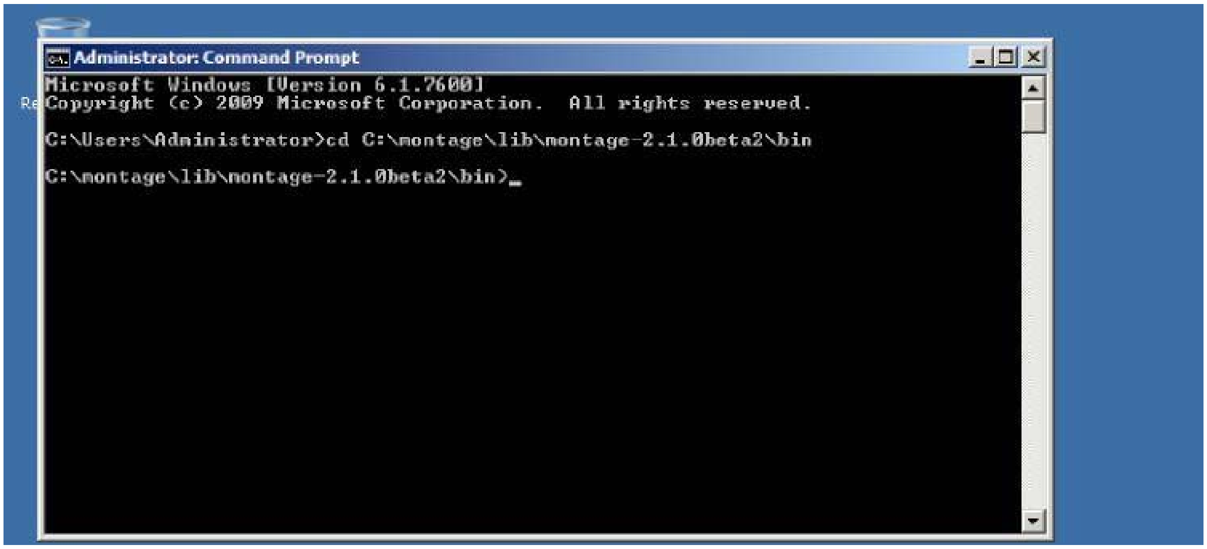
Initial Crawl

The Montage Celerybeat service will perform daily crawls of any new or updated reports, but you must manually start the process to crawl historical data from PowerScribe 360.

Warning: The initial crawl can be taxing on the upstream database server. Ideally the crawl should be against a mirrored copy of the database, during off-hours, or over a limited time window (using successive runs with --start-date and --end-date). Normal operations will still be possible, but may be slower than normal due to the increased network and CPU load.

Open a command prompt (cmd.exe), change into the bin directory of the Montage installation (C:\montage\lib\montage-VERSION\bin), e.g.:

NOTE: If O.S. is 2012, command prompt needs to be opened as an administrator.



```
Microsoft Windows [Version 6.1.7600]
Copyright (c) 2009 Microsoft Corporation.  All rights reserved.

C:\Users\Administrator>cd C:\montage\lib\montage-2.1.0beta2\bin

C:\montage\lib\montage-2.1.0beta2\bin>_
```

If you have properly configured the crawler in the CELERYBEAT_SCHEDULE, you can perform the initial crawl via the montage run_importer command.

Trial Crawl

It is recommended to run a small, trial crawl against a month or two of data.

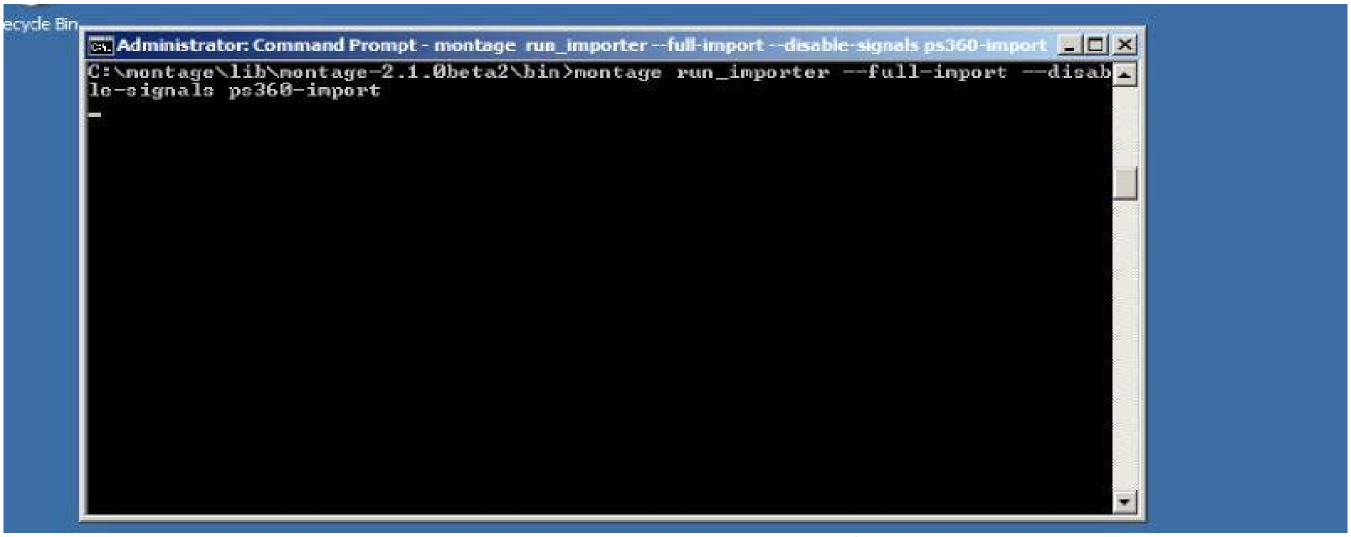
montage.exe run_importer --start-date="2012-05-01" --end-date="2012-06-30" ps360

If that succeeds without issue (check montage-importer.log), we can proceed to a full crawl.

Full Crawl

To run the full crawl (to run in smaller batches, remove the --full-import and subsitute with --start-date and --end-date, working your way back in time), execute:

montage.exe run_importer --full-import ps360

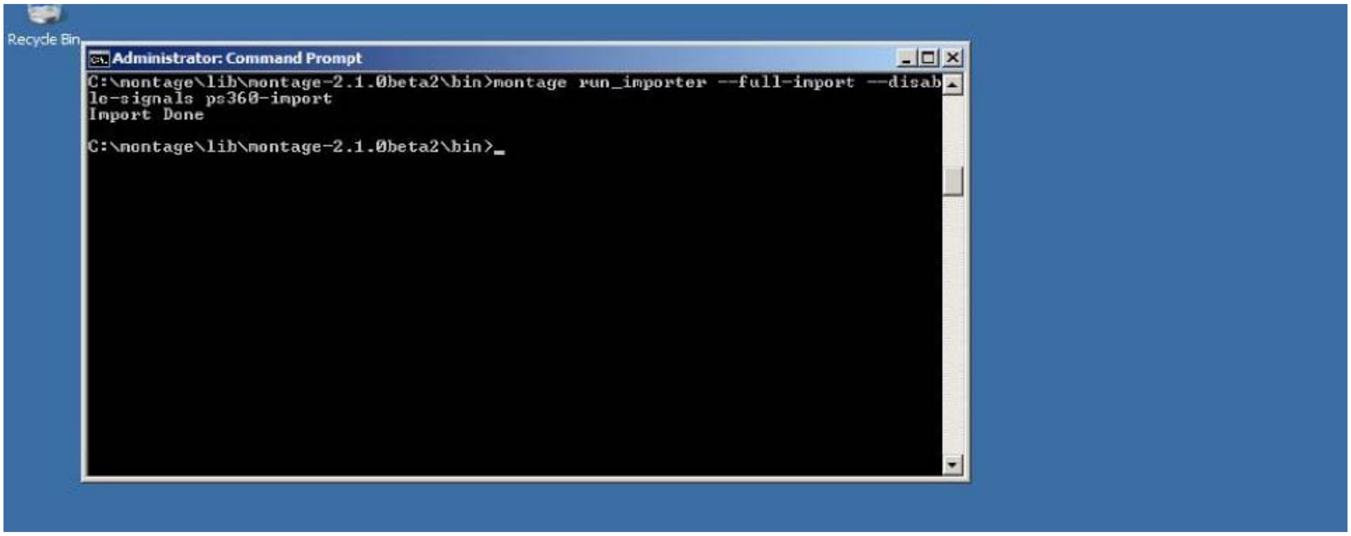

ecycle Bin
Administrator: Command Prompt - montage run_importer --full-import --disable-signals ps360-import

```
C:\montage\lib\montage-2.1.0beta2\bin>montage run_importer --full-import --disab
le-signals ps360-import
_
```

The command runs the ps360 crawler, as defined in the CELERYBEAT_SCHEDULE. The --full-import flag indicates that the typical only grab reports that are new or changed since the last crawl algorithm does not apply. Instead, all reports should be crawled.

You can monitor the import progress in the looking at montage-importer.log. The crawl speed depends upon the network connection to the SQL Server and the processing power of the Montage server. 10k reports typically only takes several minutes. Importing a whole RIS can take a day or more.

When completed, you are notified.



```
C:\montage\lib\montage-2.1.0beta2\bin>montage run_importer --full-import --disab
le-signals ps360-import
Import Done

C:\montage\lib\montage-2.1.0beta2\bin>_
```

You could wait for the Montage Indexer Scheduled Task to run at night, however, forcing the indexer to run can be done by kicking off the Montage Indexer Scheduled Task.

To access the file, navigate to C:\montage\lib\searchd-VERSION\ directory.

Installation Finished.

Manual Revision History

Note: In this table the most recent changes are first by date.

Date	Sec	Page	Change (Paragraph, Sentence, Figure, Table, etc.)	Initials
3/8/16	1	1	Added Create Montage User in COMM4Database	SEP
01/08/16	1	10	Added Identify the primary active accounts in PowerScribe SQL script.	SEP
12/1/15	1	2	Added: https://stats.montagehealthcare.com/upload	SEP
11/11/15	1	All	First Publish Date	SEP