

## **IES Medical: Set Up for Implementors**

### **Purpose**

The purpose of this Document is to provide guidelines for the Implementor of IES Medical Practice.

Note: This Document is targeted at IES Consultants, not at Users.



### **Introduction**

The Medical Practice implementation (Doctors, Physio, Vets, Optometrists, etc.) is facilitated by system support functions to make this an easy and fast implementation. Most Medical Practices are small, in some cases even single User, and as such it is of the utmost importance to be able to implement quickly and to keep consulting costs low (this kind of implementation is usually done on a fixed and small budget!). Even for larger multi-User Medical Practices the implementation is fast, and while the default set up choices are implemented by the system in automatic fashion, any required changes can still be performed afterwards to suit more advanced requirements, where necessary.


It is absolutely possible to install and implement a Medical Practice (or set up a demo system) in just a few minutes, even as little as 10 minutes, but admittedly this is a simple set up without data takeons (which would be suitable for a set up that performs billing and where Catalog Items will be opened 'on the fly' while using the system). Most of the time, however, there will be some requirement for the taking on of Ledger and Patient balances, the Invoice Catalog, and perhaps some other data items. Therefore, the general guideline for Medical Practice implementation is to allow 1 workday for set up and implementation, and 1 day for User training. Only large multi-user Practices with more complex data take on requirements should require more time than this, and in many 1 User installations the whole process can be performed in a single day (i.e. set up plus training).

### **Getting started**

For a Medical Practice implementation, you set up (install) the normal set as for any IES Business implementation, e.g. install the NaviX / Navigator Client(s), and install the server D3 and datamarts.

Recommendation: The recommended platform for IES Medical Practice is on Windows, and in most cases, Windows XP would be the best choice, with the NaviX desktop client.

As soon as the necessary software is installed, please ensure the operation of the fastdrive (which will be required for the set up). [See Systems Admin, Global Controls, System Main Parameters and remember the "Q" option which provides a 'pseudo' fastdrive facility without having to map any drives!]

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### Starting the Medical Set Up

Log to the Business Datamart that you have installed, and choose the System Set Up Module.

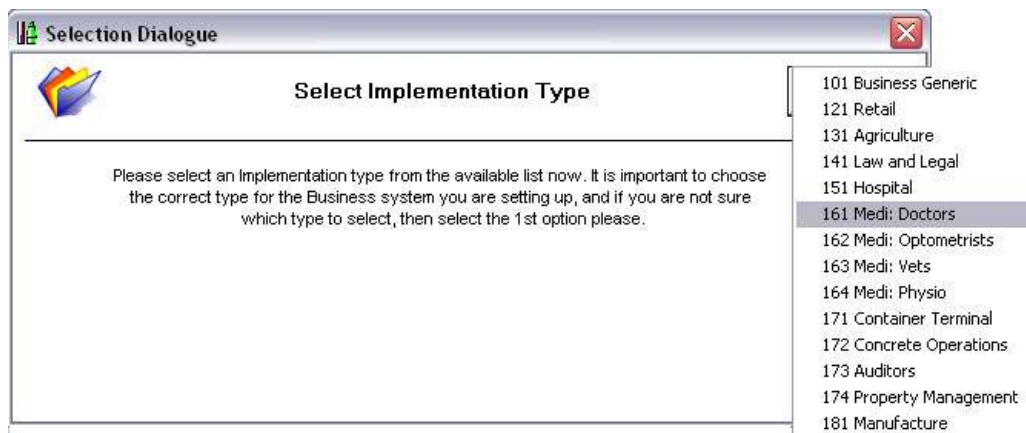
Start with the Primary Set Up option ...



And choose 'Start new set up' ...



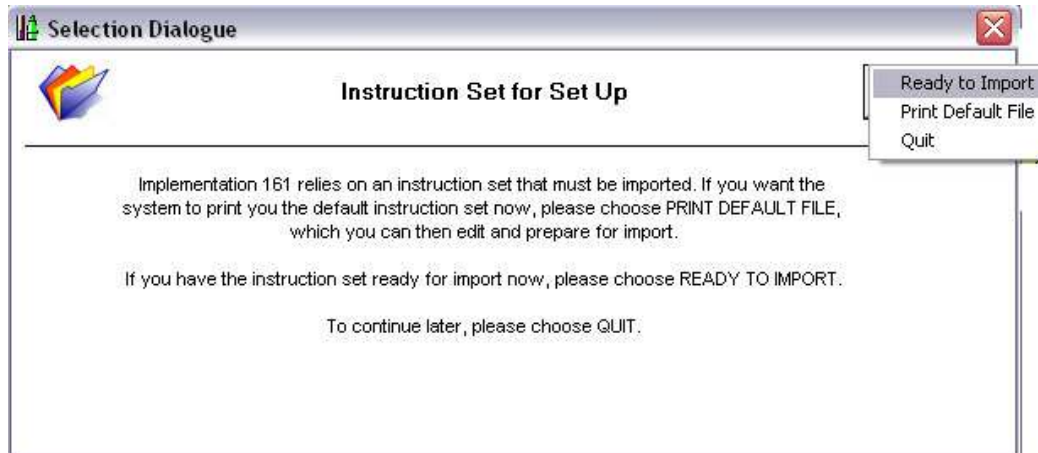
The system will ask to you verify that the current Datamart will be initialized, and so on, and will then present a list of potential Implementation types -



Now choose between options 161 to 164, and confirm as correct when prompted. The system will launch into the Datamart initialization sequence and then prompt for the instruction set import file.



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The 1<sup>st</sup> time you use this set up (or whenever you need a fresh copy of the default instruction set), you must choose 'Print Default File'. The system will then provide you with a text file that includes the default set up instruction set. Read this document and amend as necessary (it is all explained in the text document). Once the document is ready, i.e. contains your amended instruction set, you should rename it as 'instruct16x.csv' and place it on the fastdrive, for that is where the system will look for it. Now start again with the 'primary' set up step and when this point is reached again, choose 'Ready to Import'.


Hint: After your 1<sup>st</sup> implementation, you should already have a custom version of this document which you can use again and again (i.e. a version that is suited to your implementations). Therefore, you will not necessarily use the 'Print Default File' step but will launch straight into the 'Ready to Import' step.

The system will then ask a few standard questions, e.g. which Month is the Year end, how to position Asset Depreciation, etc., and once you have responded satisfactorily to these questions, the system will announce that it is now going to look for the import file.



If you do not have the instruction set in place at this stage, the implementation will fail and will have to be re-started.

The system will now launch into setting up the Medical Practice. At the end, the system will present the remaining steps, or, if you have included an instruction to set up a demo system, then the system will call for confirmation to set up the demo data.

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Below, we show the remaining steps for a 'live' set up.

Step	Step	Business Module	Status	Rank
1	Various Accounting Parameters	Accounting Controls	Active	0001
2	Define Company Control Record	Accounting Controls	Active	0001
3	Cashbook Record	Cash Book	Active	0001
4	Define Control Parameters	Medical Practice	Active	0001
5	Medi Print Text Values	Medical Practice	Active	0001
6	Appointment Book Setup	Medical Practice	Active	0001
7	Medi Take On	Medical Practice	Active	0001

You may dbl-click each of these options to perform them. Be sure to read the system notes provided on the next screen when you dbl-click an option, and when you choose 'execute step' for 'Medi Take On' the system explains the potential data takeons that you may wish to perform.

This concludes the Medical Practice implementation. The entire system is now set up and ready for use.

If you have chosen a demo set up, the system will not offer any remaining steps or data take on (sample data is provided). Instead, the demo set up will conclude and then the system is ready for demonstration.

**Selection Dialogue**

**Demo Setup**

The set up instructions indicate that a demo system should be set up here. A demo system, when set up, includes a few of all the critical items to "show" the system, e.g. a Lab, some Prescription Codes, some Stock, some Service items, etc.

Do you want the demo system set up, Yes or No?

Yes  No

**Infolab Navigator**

The demo system set up is now complete.

OK

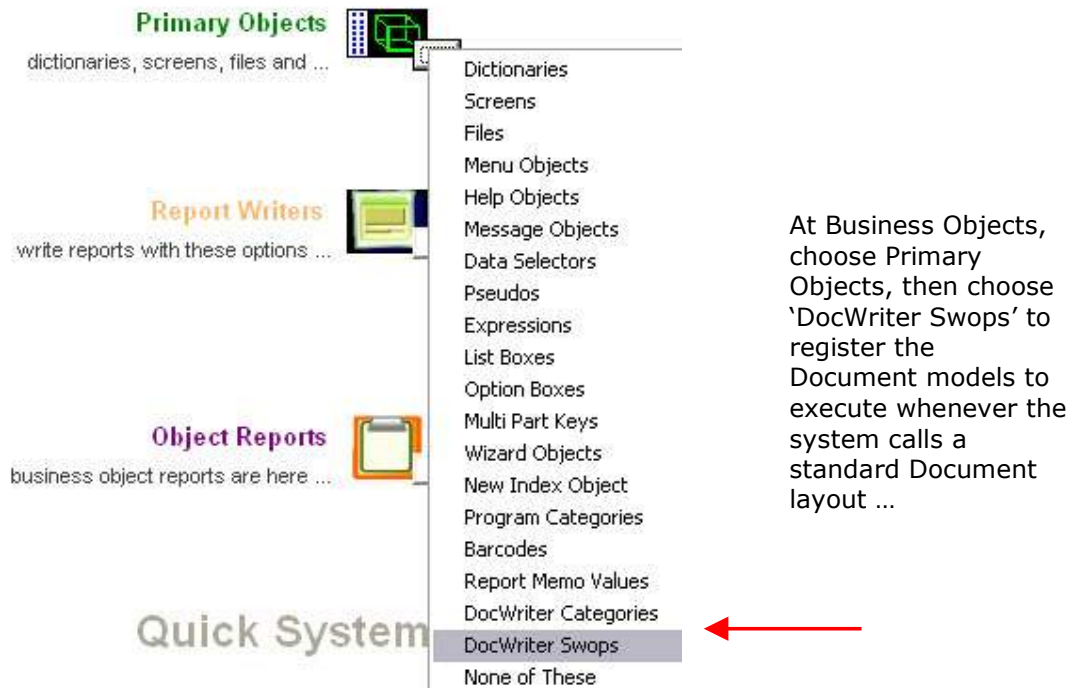
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### Notes about custom document printing

Medical Statements, Invoices, Balance Sheet and Income Statement are all based upon Document Writer, and Document Writer provides for 'on demand' real-time swopout (substitution) of a different Document layout. To customize (change the layout) of any of the standard print options, just copy the system version of the Document to a new name, make the necessary changes and record the swops as necessary.

## Business Objects

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The screenshot shows a menu titled "Business Objects" with several categories on the left and a list of items on the right. The categories are:


- Primary Objects** (green text): dictionaries, screens, files and ...
- Report Writers** (orange text): write reports with these options ...
- Object Reports** (purple text): business object reports are here ...

The list of items on the right includes:

- Dictionaries
- Screens
- Files
- Menu Objects
- Help Objects
- Message Objects
- Data Selectors
- Pseudos
- Expressions
- List Boxes
- Option Boxes
- Multi Part Keys
- Wizard Objects
- New Index Object
- Program Categories
- Barcodes
- Report Memo Values
- DocWriter Categories
- DocWriter Swops** (highlighted with a red arrow)
- None of These

At Business Objects, choose Primary Objects, then choose 'DocWriter Swops' to register the Document models to execute whenever the system calls a standard Document layout ...

Hint: Once you have made such changes for a local market, just retain your version of the Medical Practice Datamart, and perform future upgrades of IES Business on it, then always install that Datamart for a new setup, and your custom Documents will remain intact, i.e. you will not have to set them up each time you do a new installation.

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The standard Document calls (to be found in the DocWriter library ...) that the system will execute for Medical Practice include the following: -

Istate-161 : Income Statement

Bsheet-161: Balance Sheet

Medinv-1 : Invoice, English

Medinv-1-L2: Invoice, alternate language Customer

Medinv-excess: Excess Invoice format


Medinv-excess-alt: Excess Invoice for alternate language Customer

Medstate-1 : Account Statement, English

Medstate-1-2 : Account Statement, alternate language Customer

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