# Configuring MedicalDirector Blue Chip Backups

This document outlines the steps necessary for configuring a Blue Chip backup. The following points needs to be considered *before* commencing the configuration of the HCN Backup utility:

o The location of where you would like the backup files to reside.
o Determine whether documents or images are scanned into MedicalDirector Blue Chip using a scanning device, as these files will need to be backed-up *in addition* to the Blue Chip database.
o Identify any additional files or folders that are *external* to MedicalDirector Blue Chip which you would like to backup. For example you may wish to backup spreadsheets or legacy software data files.
o Determine whether you would prefer to do a *manual* backup or a *scheduled* backup.

## Important Note:

The HCN Backup utility can be configured to backup to a hard drive, or a CD/DVD formatted with a packet-writing utility. The MedicalDirector Blue Chip backup *cannot* backup directly to a tape device, unformatted CD/DVD or a network location. If you wish to backup to any of these locations please consult your System Administrator to provide a solution for this in addition to performing the HCN Backup.

## Standard Configuration

The following steps need to be undertaken to initially configure the HCN Backup Utility.

1) Within MedicalDirector Blue Chip select **BC Tools > HCN Backup**.
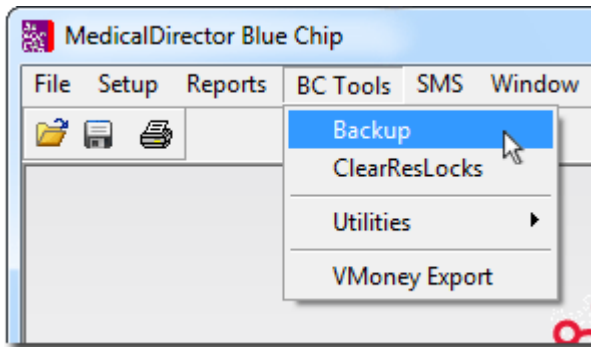


a) A warning prompt will appear informing the user that they need to exit MedicalDirector Blue Chip to run the HCN Backup. Select the **Yes** option.

2) The HCN Backup/Restore Wizard dialog box appears. Click the **Next** button.

3) When prompted to Backup or Restore, select **Backup**. Click the **Next** button to continue.

4) From the list of backup options that appears, select **All HCN Data**. Click the **Next** button to continue.
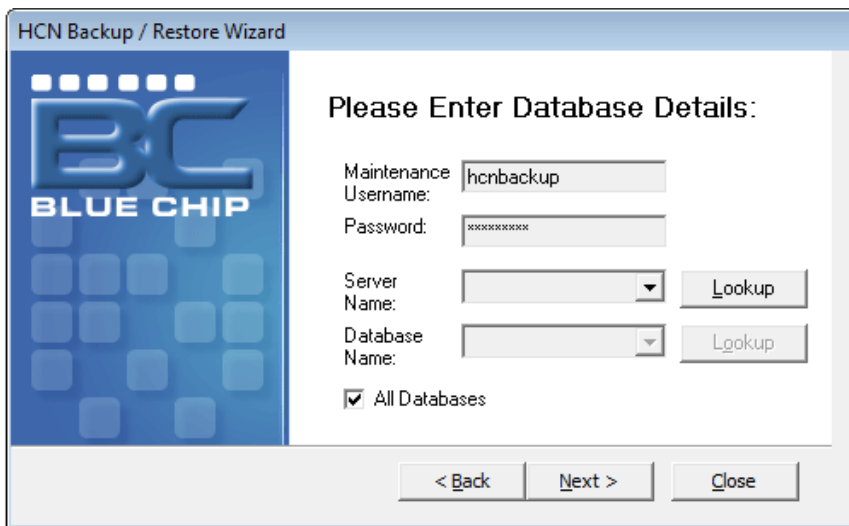


5) When prompted to enter your database details, type in hcnbackup for both the Maintenance Username and Password.

6) Click the **Lookup** button next to the Server Name drop-down box. The MSDE instance name should appear. This will be in the format computername\instancename e.g. SERVER\HCNSYSTEM.

7) Click the **Lookup** button next to the Database Name drop-down box.

a) Click the down-arrow for this drop-down box and select the name of the practice database. This name is usually in the format DoctorsNamepractice, e.g. for a Dr. Smith it would be smithpractice.

8) Click the **Next** button twice to perform the first backup.

## Advanced Configuration

The following information provides the steps for configuring detailed settings for the HCN Backup Utility.

1) Start the HCN Backup Utility using the method in Step 1 of the standard configuration, above.

2) On the first page of the wizard click on the **Advanced Backup View** checkbox.



3) The window that appears contains two tabs: Database and Documents.

- The Database provides the configuration options specifically for the database.

- The Documents tab provides the configuration options for the documents scanned/imported into MedicalDirector Blue Chip and for any folders/files that are external to MedicalDirector Blue Chip which are desired to be backed up.

4) On the Database tab type in hcnbackup for the Maintenance Username and the Password.

5) Click the **Browse** button next to the Backup Location Folder to search for the desired database backup repository. Select the location that you would like to use, and click the **OK** button. The location should now be displayed in the text box.

6) Check or uncheck the Generate time/date stamp and append to filename Checkbox to turn on or off the feature that adds the time and date to the end of the backup filename. (NB: This setting will only be retained if performing a scheduled backup).

7) Click the **Documents** Tab. Click the **Browse** button and select other folders to add them to the list of Documents and Folders to Backup. These documents and folders will be backed up in addition to the database into a separate backup file.

   a) If the Practice scans or imports images into MedicalDirector Blue Chip, ensure that the ManageEzy folder is included in the list of documents and folders to backup. The standard location of this folder is C:\ManageEzy.

   b) You can also turn on/off the time/date stamp for the documents backup file by checking or unchecking the relevant check box.

8) To save these changes click the **OK** button and a backup will be performed.

## Scheduled Backups

The HCN Backup Utility can be scheduled to run outside of business hours. This is configured using the Advanced Backup View with the following method.

1) Perform up to and including Step 7 of the Advanced Configuration section above.

2) Uncheck the **Run Now** checkbox on the Database Tab and then click the **OK** button.

3) The first prompt to appear asks "when would you like to perform the task?"

   a) Leave the **Days to run in Week** option selected, and click the **Next** button.

4) The second prompt to appear asks "Please select the time and day you would like this task to start."

   a) Select your desired time with the spinner box by clicking the up and down arrows.

   b) Select the days you desire to do the backup with the options and check boxes. Click the **Next** button to continue.

5) Do not enter any details in the third prompt. Click the **Next** button. Then click the **Close** button.

It is best practice to test this scheduled backup. This can be done from within Windows Scheduled Tasks. The scheduled task will be labeled AT1 and can be executed by right-clicking on it and selecting **Run**.

## Manual Backups

You may wish to do a manual backup so that you can take the backup media with you when you leave. The following method is recommended for performing this:

1) Start the HCN Backup Utility from within MedicalDirector Blue Chip

2) Click the **Next** button three times.

3) When prompted, type in hcnbackup in both the Maintenance Username and Password boxes.

4) Click the **Next** button twice and the backup will commence.

5) Once the backup has completed close the HCN Backup utility.

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