

SHEPHERD COMMUNICATION, INC.

# MEDI-REMOTE BACKUP SOFTWARE MANUAL

Published: October 2004

MEDI Remote BackUp

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## PRODUCT OVERVIEW

The MEDI-RB (MEDI Remote Backup) software is Insurance for your data. The MEDI-RB was created to assist the Healthcare Provider in protecting valuable and often irreplaceable business data. After all, it only takes seconds to lose work that's taken weeks, months and even years to gather. MEDI-Remote is a convenient, reliable service that offers peace of mind, knowing that your important electronic files are secure.

Each company should have their own on-site backup procedures as mandated by HIPAA. However, these on-site backups can be of little use in the event of a major catastrophe: a fire, tornado, flood, or earthquake. MEDI-RB securely stores your data at an off-site location so that a business can be up and running more quickly after a major catastrophe.

Shepherd Communication Inc.'s Remote Back-up Service (MEDI-Remote) supports the user in HIPAA compliancy by partnering with your agency in the creation of your Contingency Plan (Section 164.308(a)(7)). Shepherd Communication can be a valuable asset as an off-site backup resource which should be part of your Data Backup Plan and your Disaster Recovery Plan.

The features of the MEDI-RB include:

1. The ability to maintain a central storage of all important business data at an off-site location protecting your valuable data from various threats such as a computer virus, equipment malfunctions, human error, or natural disasters, allowing the user to be up and running again in a matter of hours, not days or weeks.
2. The uploading of your data is completed at a time and frequency convenient for you, whether late at night or first thing in the morning so that computer usage is not interrupted. The user has the flexibility to establish a schedule that fits your company's needs.
3. The business information that is stored is encrypted and password protected prior to uploading to Shepherd Communication Inc.'s off-site storage location, meeting or exceeding HIPAA's Privacy requirements for PHI.
4. The MEDI- Remote Backup program assists the user in HIPAA compliancy by partnering with your agency in the creation of your Contingency Plan (Section 164.308 (a)(7)).
5. The MEDI-RB provides the user with a daily status report so that there is an assurance that the backup occurred and was successful. If, for some reason the backup was not successful, the user has the option to complete a backup on demand, so that a current backup is always available.

## SYSTEM REQUIREMENTS

The following are minimum and recommended specifications to run all MEDI software HIPAA compatible products. This includes MEDI-HC, MEDI-MP, MEDI-EMS, MEDI-ECS, and MEDI-RB (in their HIPAA compatible versions).

The specifications list the minimum requirements, but keep in mind that performance is measured by the equipment that you use. Shepherd Communication, Inc. recommends that you have a faster processor and more RAM than the minimum requirements. In all situations, it is best to consult with a computer technician, to verify that your system meets or exceeds the requirements or how best to meet these requirements.

The following specifications are needed on each PC/workstation that will run any MEDI software. Please make note that our software will not even install if the minimum system specifications are not met!

1. Windows XP Home or Professional is the recommended operating system. **PLEASE NOTE:** Windows 2000 will support and run MEDI Software, but with Shepherd Communication's technical support staff using XP, XP is preferred. The MEDI Software will not install or run on Windows 95, 98, ME, NT.
2. PC with 300 megahertz or higher processor clock speed required, Intel PentiumII/Celeron family, or AMD K6/Athlon/Duron family or higher performing processor is strongly recommended.
3. 128 megabytes (MB) of RAM, 256 or additional, strongly recommended. gigabytes (GB) of available hard disk space.
4. Super VGA (800 × 600) or higher-resolution video adapter and monitor. 17" or 19" monitor is recommended, but not required.
5. CD-ROM or DVD drive
6. Keyboard and mouse or compatible pointing device
7. Modem connected to a telephone line for software activations
8. HIPAA requires backup of all of your data so you should have a means of backing up on this computer.
9. Internet access (as of writing these specifications AOL or MSN will NOT work as an Internet Service Provider).

## ON-SITE BACKUPS

Investing in a timely back up system can be an asset to your company. The loss of any data can be time consuming and costly to your business. While the MEDI-RB offers the Healthcare Provider a cost effective, simple solution for off-site backup of valuable business data which is recommended to meet the HIPAA Disaster Recovery Plan Requirements found in the HIPAA Security Regulations, this should not replace your company's on-site backup procedures. It is the responsibility of the user to make timely backups of all of your business data. Shepherd Communication Inc. strongly suggests investing in a zip drive, tape drive, or other storage media to be used to create backups of your computer's data.

The loss of any data can be time consuming, frustrating, and costly to your business. Shepherd Communication Inc. recommends that to meet the state and federal requirements you perform frequent backups of the data. These backups should be stored in a safe place, protecting them from fire or water damage and acts of nature.

## UPS- UNINTERRUPTED POWER SUPPLY

Shepherd Communication Inc. recommends investing in an Uninterrupted Power Supply Unit to be placed on the computer that is running the MEDI-RB. This will protect your data from the damages of power surges or power spikes. A good UPS unit runs about \$125.

# INSTALLING MEDI-RB

MEDI-RB requires Windows XP or Windows 2000 operating systems in order to run properly. (Please refer to the Minimum Computer Specifications found in the front of this manual.) MEDI-RB will not install on a computer that does not meet or exceed these requirements. Shepherd Communication Inc.'s software warranty and technical support may become null and void if the MEDI-RB is placed on a computer that does not meet the minimum computer specifications.

## PROGRAM INSTALLATION FROM A CD-ROM

1. Insert the MEDI-RB disk into your CD-ROM drive.
2. At the Windows desktop, click the My Computer icon.
3. Open the CD-ROM and Open the MED-IRB folder.
4. Double-click on the MEDI-RB1.X.X.exe.
5. Continue with the MEDI-RB installation.

## THE INSTALLATION PROCESS

The first window that appears (see Figure 1) welcomes the user and informs the user that the installation process is about begin. To continue the installation process, click NEXT, to exit this process, click CANCEL.

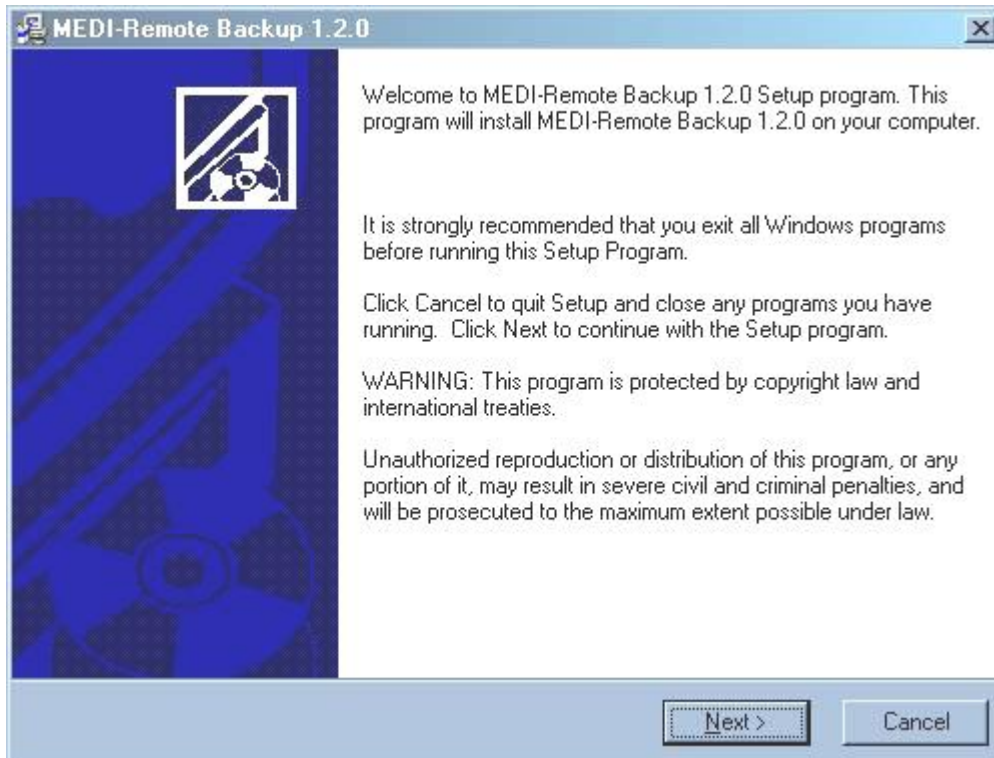


Figure 1. Welcome Screen

When the following Software License Agreement below appears (see Figure 2), click "I AGREE" to continue.

MEDI Remote BackUp

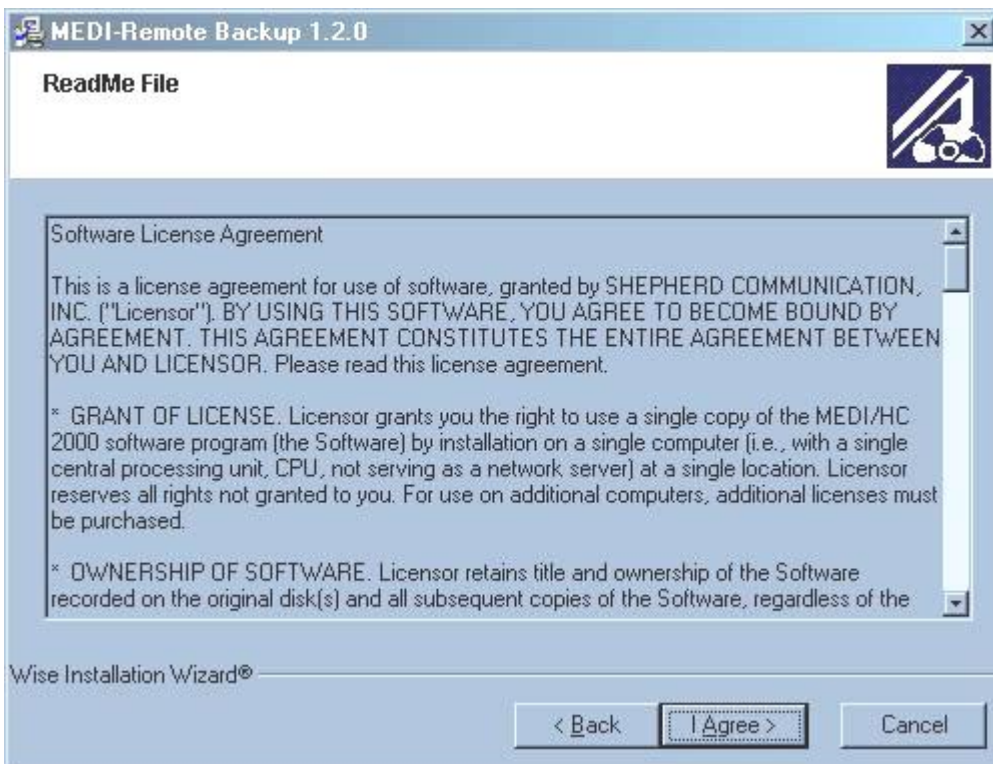


Figure 2. Software License Agreement

When the screen example below appears, click "NEXT" to continue. This screen identifies where the software program will be installed. You must install this software on the C drive of the computer.

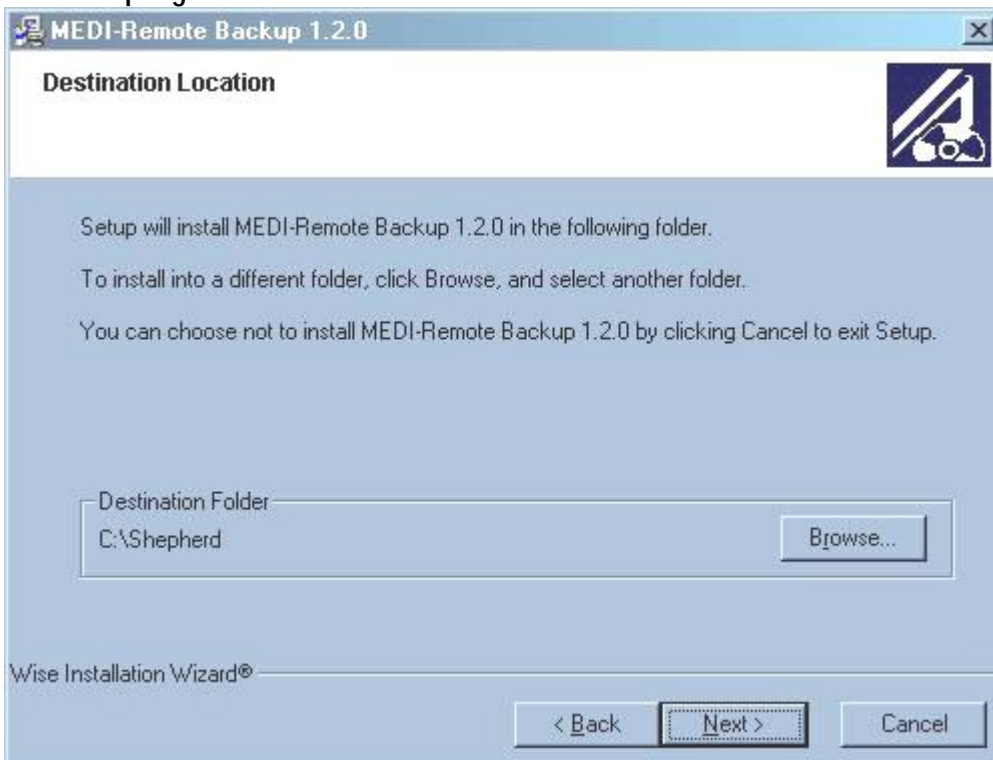


Figure 3. Destination Location

When the screen example (Figure 4) below appears, click “NEXT” to continue. It is recommended that you answer “NO” to this screen to conserve Hard Drive space.

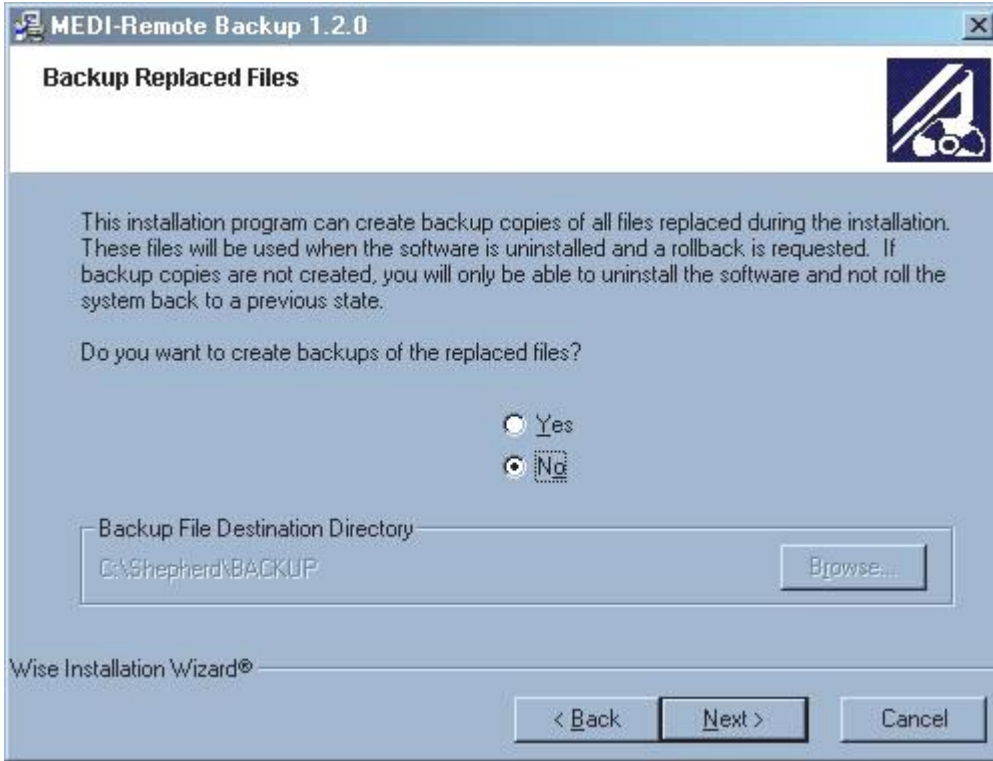


Figure 4. Back up Replaced Files Screen

When the screen example (Figure 5) below appears, click “NEXT” to continue. The installation of the MEDI-RB will begin.

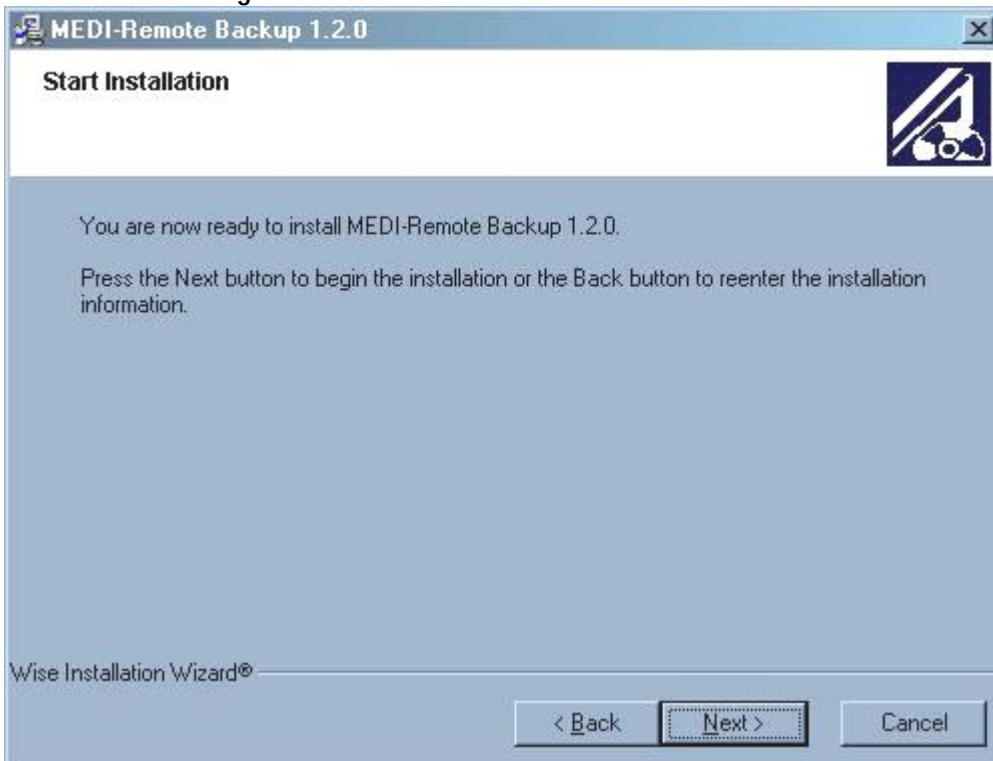


Figure 5. Software Installation Screen

When the screen example (Figure 6) below appears, click "FINISH" to continue. The MEDI-RB has been successfully installed onto your computer.

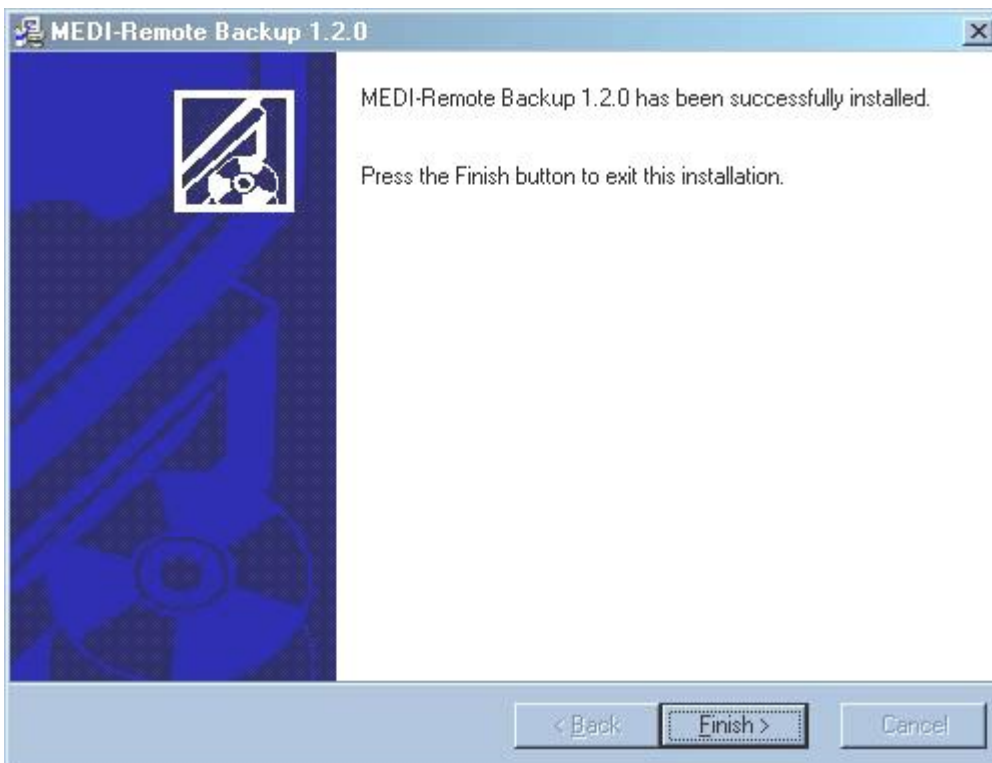


Figure 6. Finish Screen

Once the MEDI Remote Backup program has been successfully installed on your computer, a MEDI Remote Backup icon will be placed on your Desktop.



Medi Remote Backup.ico

Figure 7. MEDI-RB icon

To begin using the MEDI-RB, the user should double click on this icon.

# SETTING UP THE MEDI-RB

When running the MEDI-RB for the first time, the following screen (Figure 8) will be visible in the background as you complete the preliminary setups. This screen documents your progress through the setup of the MEDI Remote Backup:



Figure 8. MEDI- RB Setup Status Screen.

After the MEDI-RB completes the initialization, the Administrative user screen (Figure 9) is the first window that will display.



Figure 9. Administrative User Screen

Create a unique username and password for yourself as the administrative user. Make sure that the password is a minimum of 6 characters (a combination of lower case letters/numbers is recommended.) You must confirm the password by entering it a second time. Then make sure to write your username and password (just as you typed it in password field) down in a safe place. Make sure to note any capital letters, etc.

The User Configuration Screen is next (Figure 10). Please click on “EDIT USER INFO” to continue.

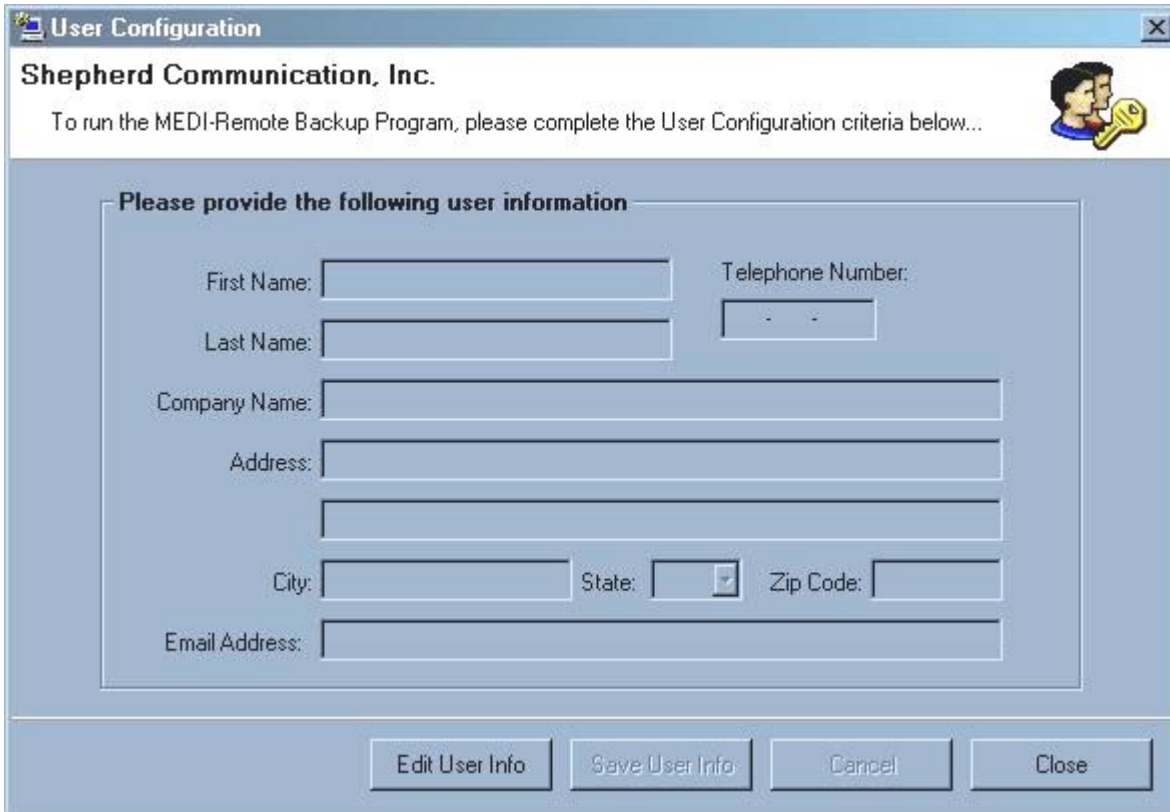
The image shows a Windows-style dialog box titled "User Configuration" for "Shepherd Communication, Inc.". The window contains a message: "To run the MEDI-Remote Backup Program, please complete the User Configuration criteria below...". Below this is a section titled "Please provide the following user information" with several input fields: "First Name:", "Last Name:", "Company Name:", "Address:" (with two stacked text boxes), "City:", "State:" (a dropdown menu), "Zip Code:", "Telephone Number:" (with a small box for area code), and "Email Address:". At the bottom of the dialog are four buttons: "Edit User Info", "Save User Info", "Cancel", and "Close".

Figure 10. User Configuration Screen

After clicking “EDIT USER INFO”, the following screen will appear (Figure 11). Your user name will be displayed and it will require you to enter your password. For security purposes, anytime you click on EDIT, this screen will appear and require the user to enter the valid password. This security feature protects this backup function from people making unauthorized changes.

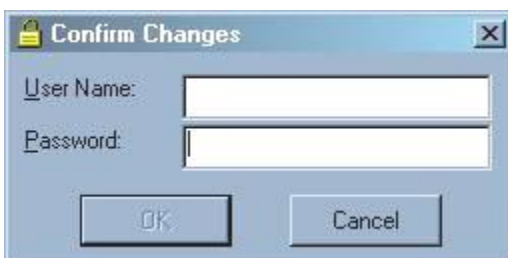
The image shows a small dialog box titled "Confirm Changes" with a lock icon in the title bar. It contains two input fields: "User Name:" and "Password:". Below the fields are two buttons: "OK" and "Cancel".

Figure 11. Confirm Changes Screen

Once the correct, valid password has been entered and the password is confirmed, the following screen (Figure 12) is enabled with yellow fields. Yellow fields indicate that they are required and all must be filled in prior to saving this information. Please complete all yellow fields, see Figure 13.

**User Configuration**

**Shepherd Communication, Inc.**

To run the MEDI-Remote Backup Program, please complete the User Configuration criteria below...

**Please provide the following user information**

First Name:

Last Name:

Company Name:

Address:

City:  State:  Zip Code:

Email Address:

Telephone Number:

Figure 12. User Configuration Screen

**User Configuration**

**Shepherd Communication, Inc.**

To run the MEDI-Remote Backup Program, please complete the User Configuration criteria below...

**Please provide the following user information**

First Name:

Last Name:

Company Name:

Address:

City:  State:  Zip Code:

Email Address:

Telephone Number:

Figure 13. Completed User Configuration Screen

After you have successfully completed filling in the Yellow Fields, the button labeled "SAVE USER INFO" is enabled. Click on the "SAVE USER INFO" button. After saving your user information, click "CLOSE".

The following screen (Figure 14) will appear when setting up the MEDI-RB for the first time:

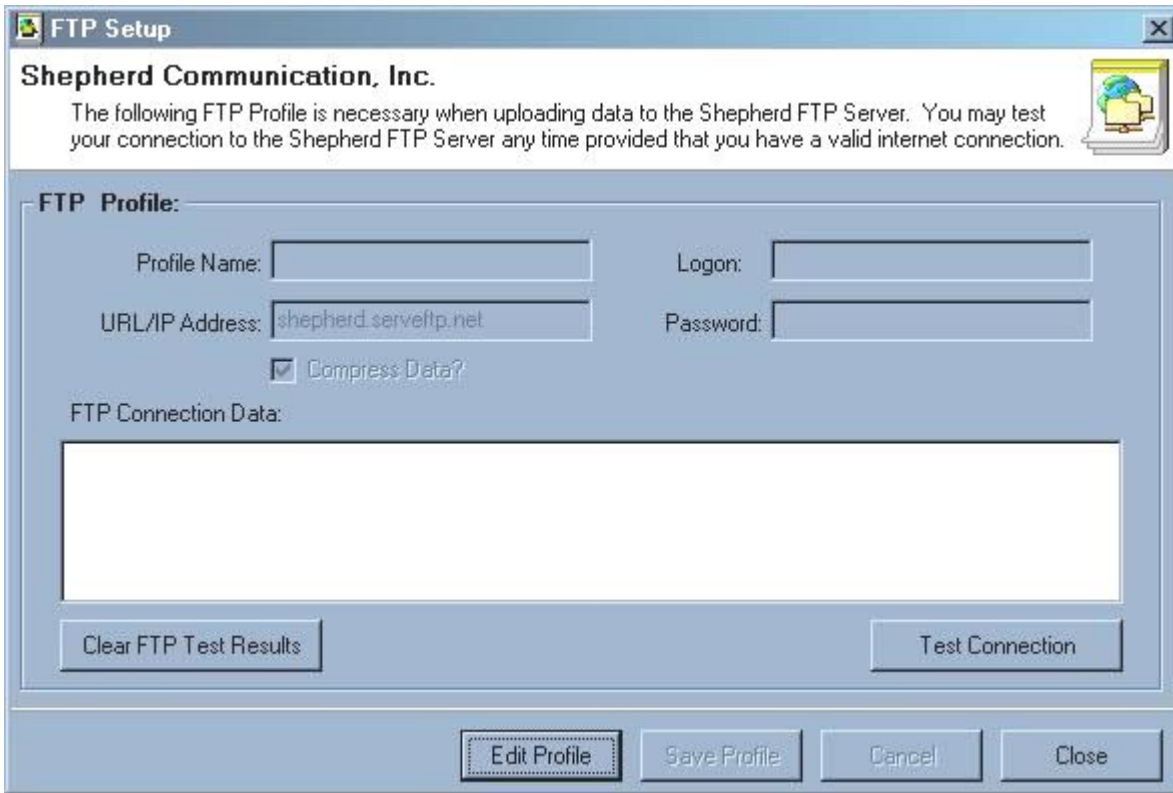


Figure 14. FTP Setup Screen

Click on "EDIT PROFILE. Because you have chosen to EDIT, you must confirm your password.

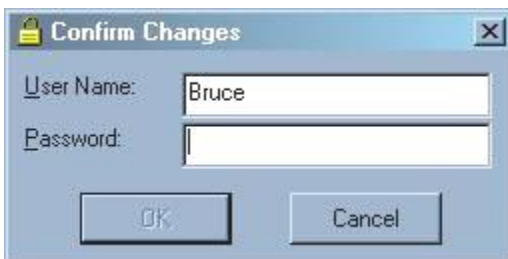


Figure 15. Confirm Changes

Shepherd Communication Inc. will supply you with the Profile Name, Logon, and Password. Please enter this information in the yellow fields. It is extremely important that you use the information supplied by Shepherd Communication and make sure that you have entered the information exactly as it was sent to you.

Your Company Name: \_\_\_\_\_

Your Profile Name: \_\_\_\_\_

Your Logon Name: \_\_\_\_\_ Your Password: \_\_\_\_\_

MEDI Remote BackUp

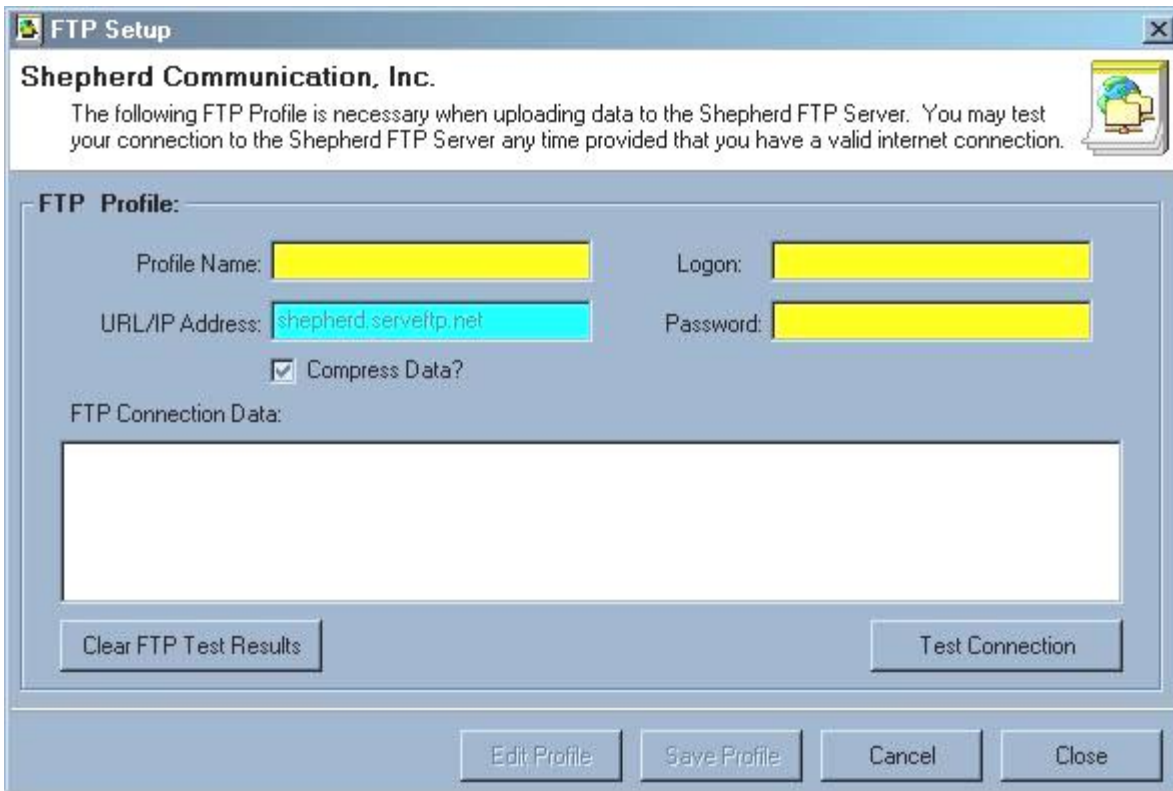


Figure 16. FTP Setup Screen

When completed, click on "SAVE PROFILE". Next, to verify that you can connect to Shepherd Communication Inc., click on "TEST CONNECTION". If you are successful, information will appear under the FTP Connection Data window. See Figure 17 as an example of a successful connection.

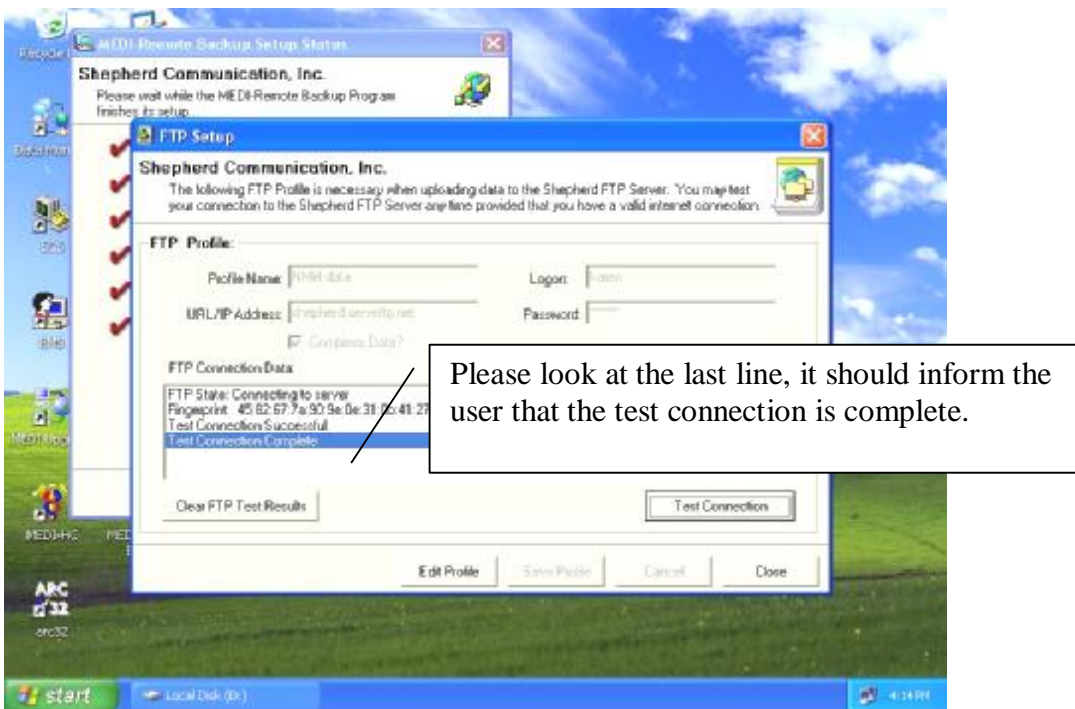


Figure 17. Successful FTP Connection Screen

Click on "CLEAR FTP TEST RESULTS" and then click the "CLOSE" button.

# THE MAIN SCREEN

Once all of the required setup information has been entered, the Main Screen (Figure 18) for the MEDI-RB is displayed below. We will discuss all of the buttons displayed on this screen. This screen will also be displayed after each backup has been performed. If you have your backup scheduled for early morning (2 a.m.) or so (F.Y.I., this will require you to leave your computer on all night) when you arrive in the morning, this screen should be displayed and it will show you the status of the previous night's backup.

Not only can you schedule a backup, but you can always do a backup on demand (see BACKUP NOW section of this manual). Thus feature gives the user the greater flexibility to create a new backup anytime.

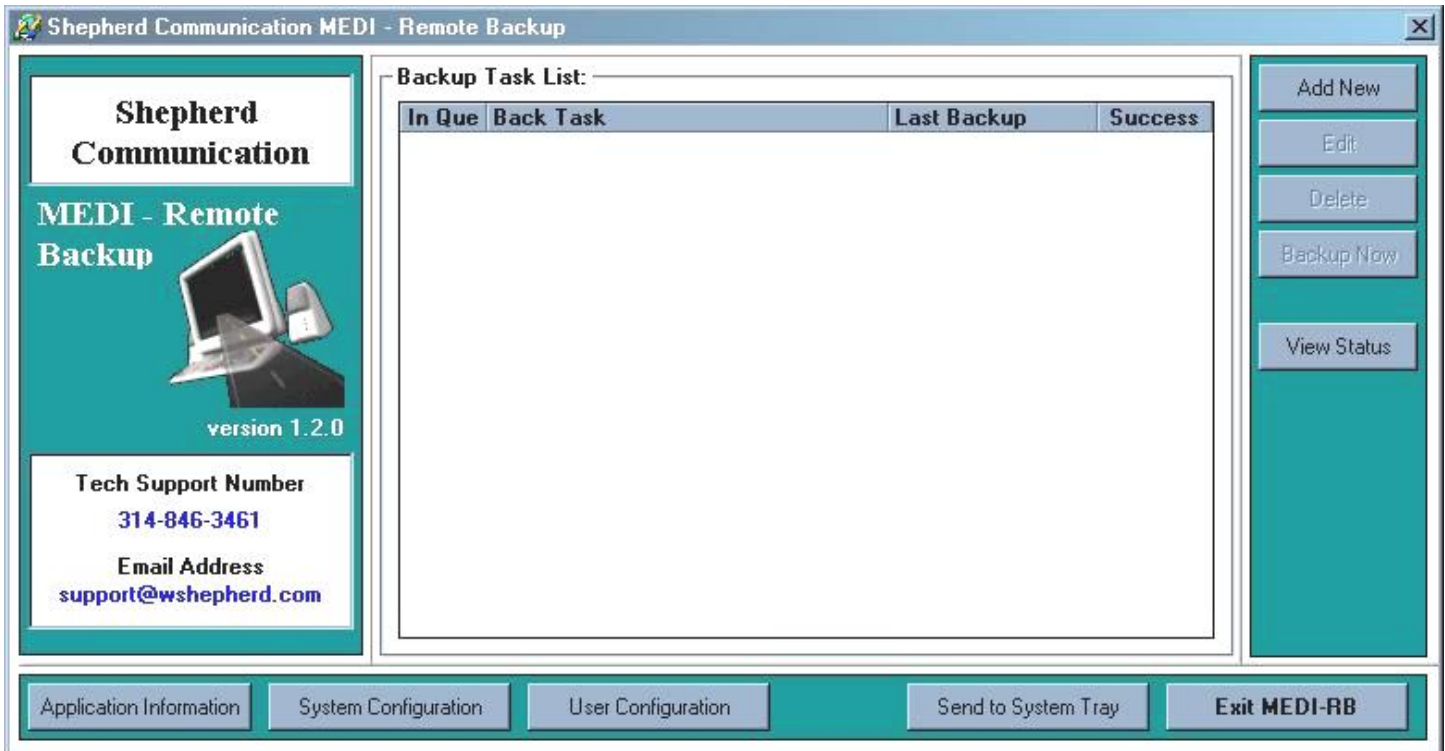


Figure 18. MEDI-RB Main Screen

## APPLICATION INFORMATION BUTTON

The details for the MEDI-RB Application will be displayed. This screen (Figure 19) will show the current version of the MEDI-RB that you are running.

Click "OK" to return to the Main Screen.



Figure 19. Application Information Screen

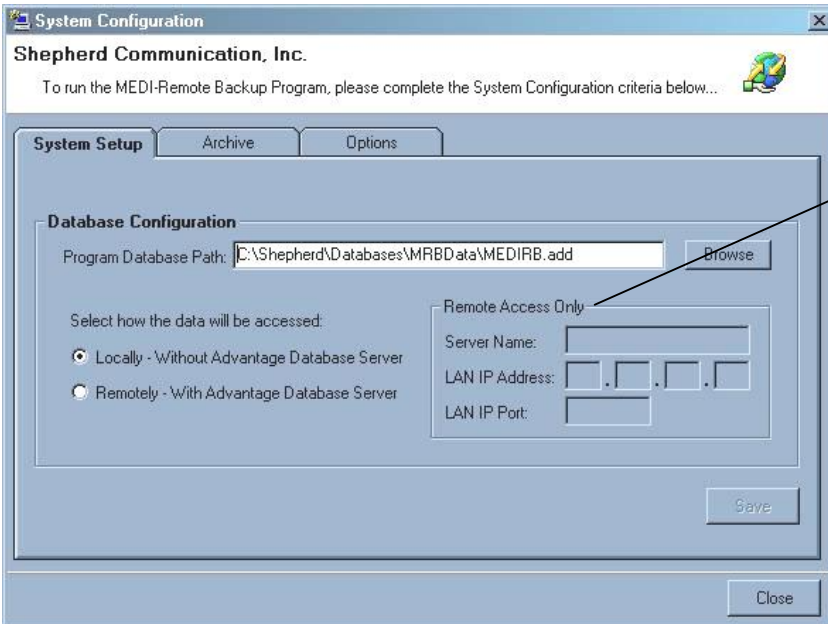
## SYSTEM CONFIGURATION BUTTON

The System Configuration has three separate tabs.

### SYSTEM SET UP TAB

“SYSTEM CONFIGURATION” will display the following screen (Figure 20) with the System Setup tab enabled to view information or make changes. This will identify where your MEDI-RB files are stored. This database path will default to a local computer, the C drive, and the Shepherd Folder. If you are using the Advantage Database Server in a network environment (please call Shepherd Communication Inc if you are unsure), please click on REMOTELY. This will enable all of the fields under Remote Access Only. Please fill in these yellow fields.

***NOTE: If you are using another MEDI software program, you can copy this information from that program. Please open that program and go to UTILITIES and choose SYSTEM SETUP.***



This area will become enabled and will allow the user to enter the server name, address, and port. If you are using any other MEDI product, you can get this information in that program. Go to Utilities and choose System Setup. Copy the information as it appears in that program to this screen in the MEDI-RB.

Figure 20. System Setup Tab

## THE ARCHIVE TAB

The MEDI-RB will first create a zip file of the data that will be eventually be stored off site, the Archive Tab (Figure 21) will display the location which has been chosen to store the backup archives, and a button to access the FTP setup. The ability to edit this information is made available by clicking the "EDIT ARCHIVE" button. **NOTE: For security purposes, you will once again be required to confirm your password!**

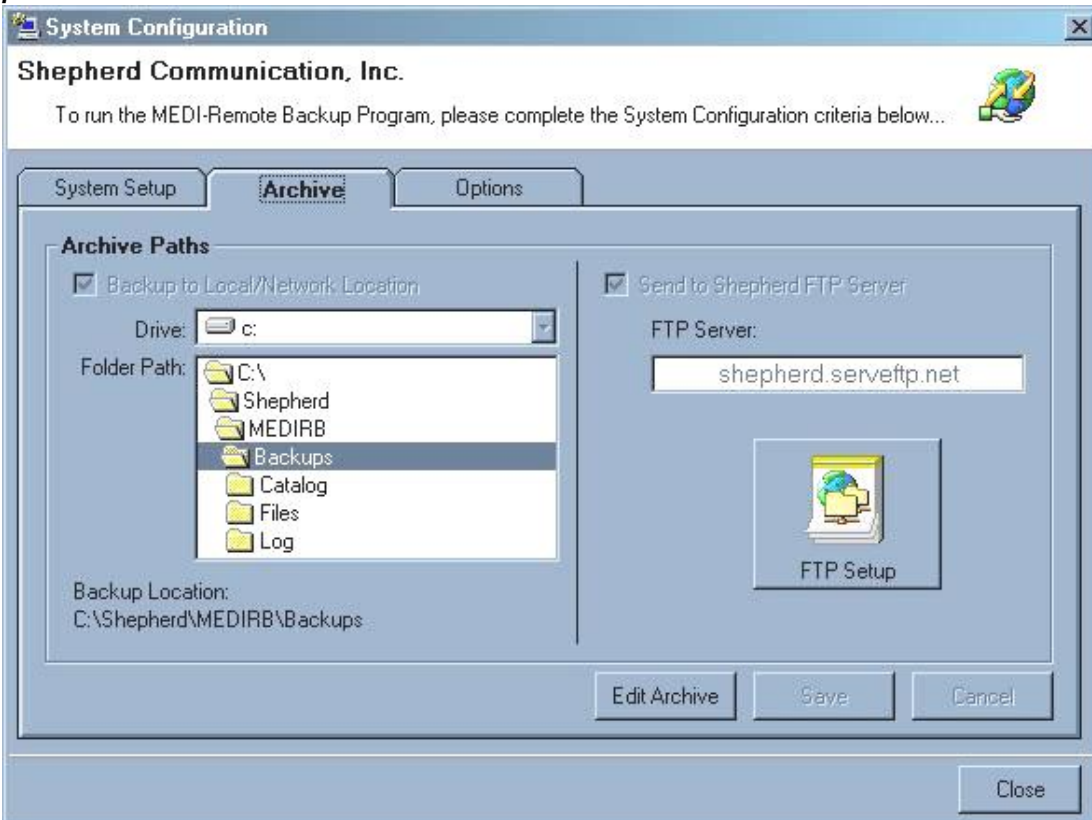


Figure 21. Archive Path Screen

## THE OPTIONS TAB

The Options tab (Figure 22) allows you to view the system options chosen for your particular machine. It is recommended that the defaults are used. The ability to edit this information is made available by clicking the “EDIT OPTIONS” button. Do not change your password with out approval from Shepherd Communication Inc. Changing/editing the password without approval or acknowledgement from Shepherd Communication Inc. could result in your backup not being completed.

**NOTE:** For security purposes, you will be required to confirm your password!

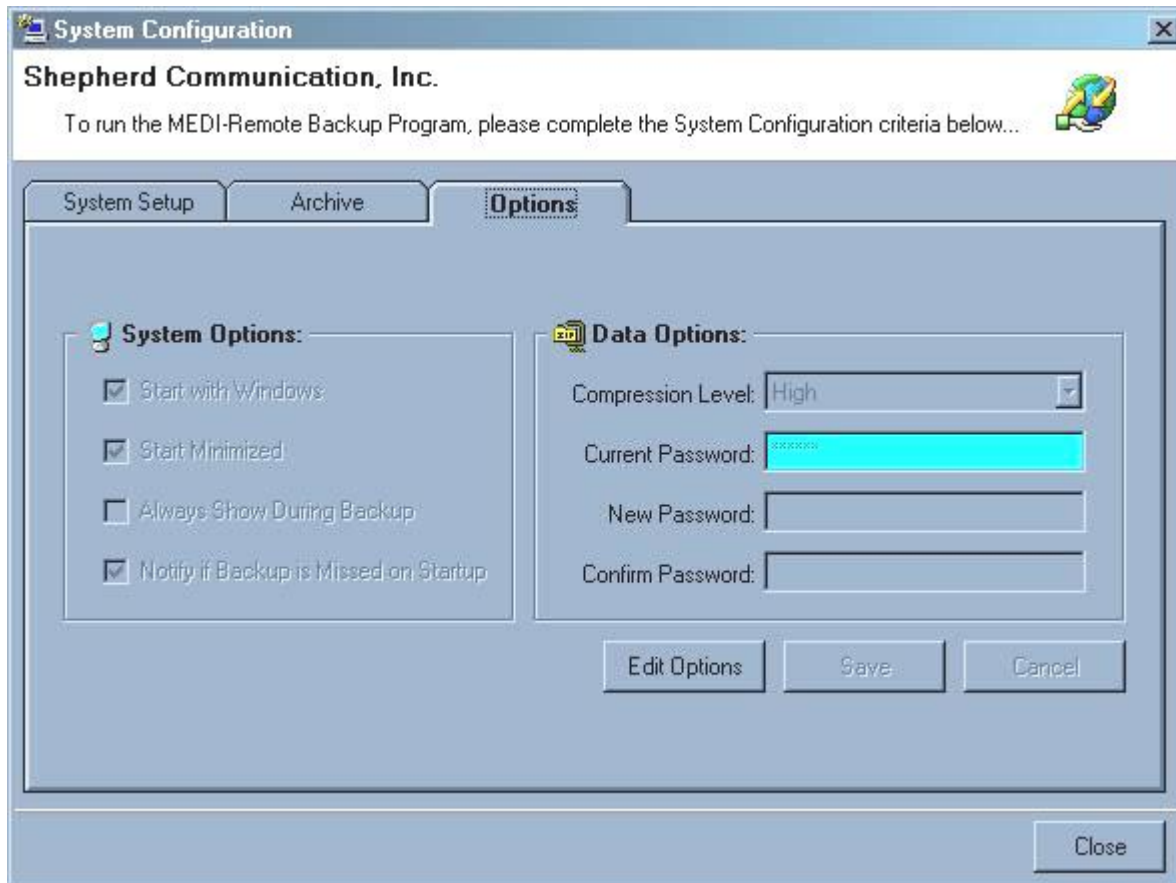


Figure 22. Options Screen

## CREATING THE BACK UP AND THE SCHEDULE

The MEDI-RB program will automatically create a backup file called SHEPHERD DATA. This backup file will contain all your information retained in the Shepherd Folder on your C drive or network drive (depending on how you configured your system setup screen (See Page 18 of this manual). In this area, will determine the day(s) and time to perform the off site backup, i.e. the schedule.

The user should find the MEDI-RB icon on your desktop and double click it to open the program. The MEDI-RB Main Screen should appear (Figure 23).

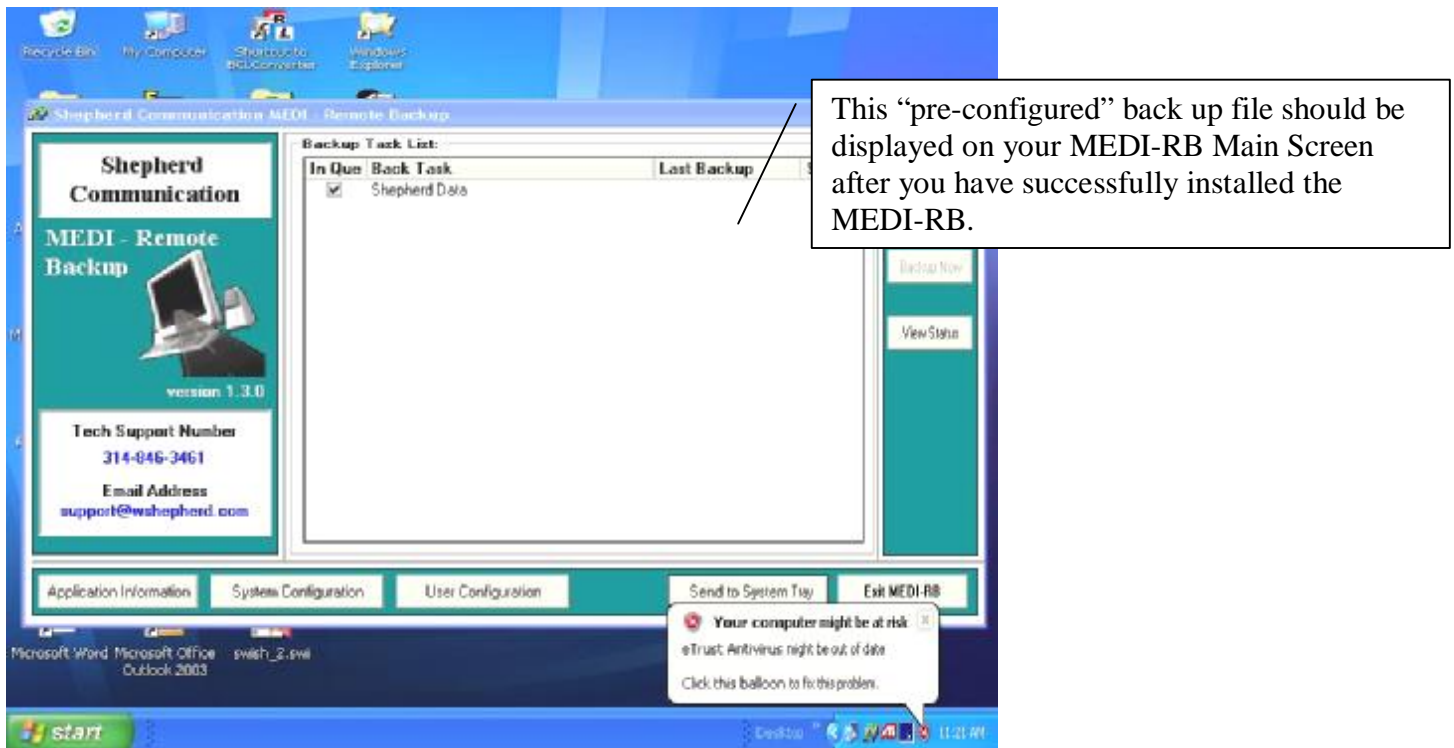


Figure 23. MEDI-RB Main Screen

The user should see the pre-configured backup file called “Shepherd Data” that is automatically created by the MEDI-RB. The user should click on this file (highlight this file) and click EDIT.

## ADD NEW BUTTON/EDIT BUTTON

Once you have clicked the ADD NEW or the EDIT Button the following screen will appear (Figure 24). This area of the MEDI-RB has four tabs. Each tab will be identified and the function of each tab will be discussed.

### THE SOURCE TAB

In this screen, a user can identify which files are currently being placed in the Shepherd Data backup or the user may create a new backup task; first giving it a unique name, and then selecting the folders you wish to backup by placing a check in the corresponding boxes on the source tab. In this example, Figure 24 displays what files are being included in the Shepherd Data backup.

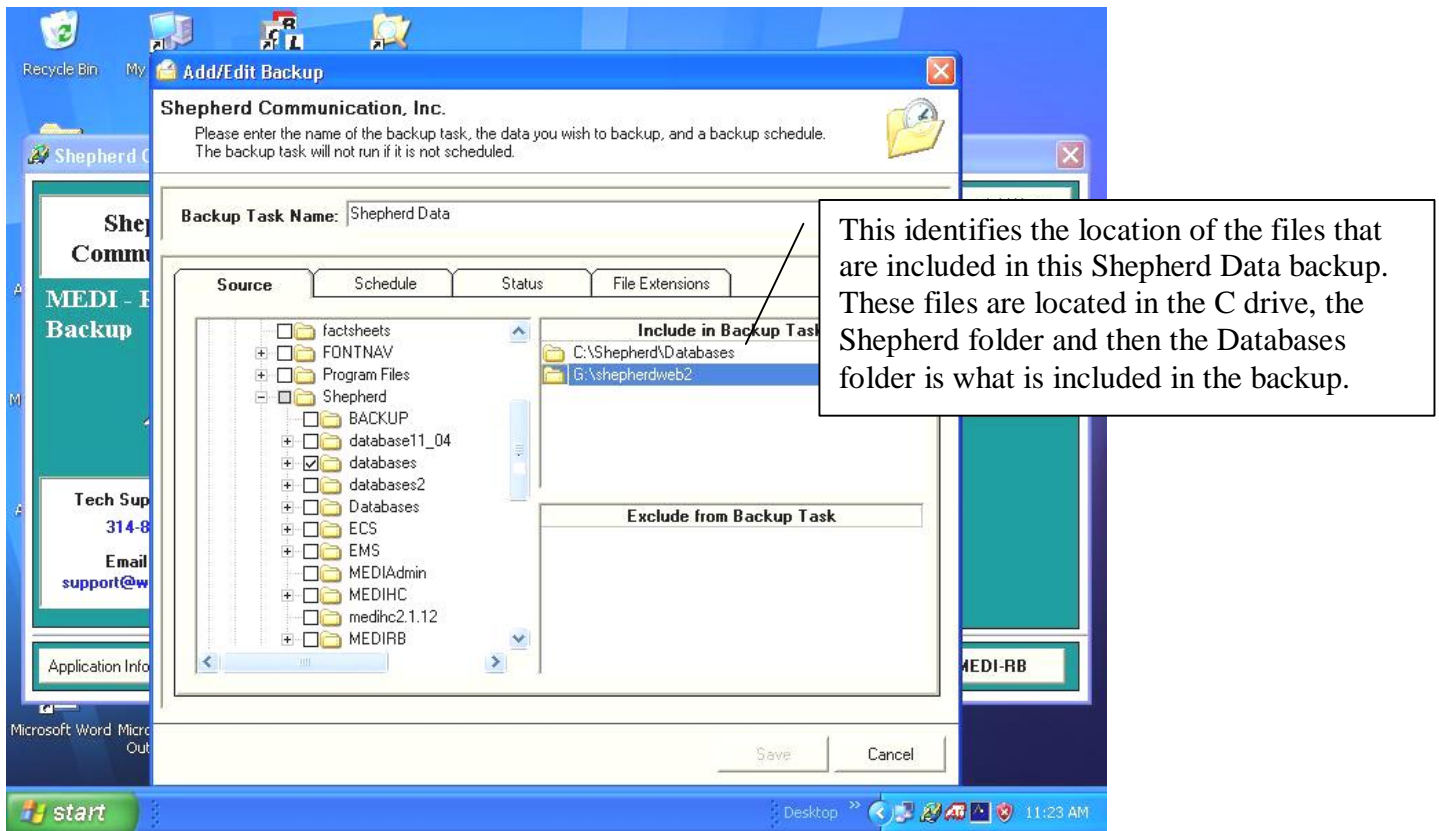


Figure 24. The Source Tab

## THE SCHEDULE TAB

The Schedule Tab is the area where the backup schedule will be created. In the following example (Figure 25), the Backup Task Name is displayed (Shepherd Data) and below the user has scheduled this backup to occur at 4:24 am on Monday, Tuesday, Wednesday, Thursday, and Friday. In order for this backup to be successful, the user's computer must remain on throughout the night.

The process for creating a schedule is to find a time that is convenient for the user and then place a checkmark next each day that you want the backup to occur. When you are satisfied with your selections, press the "Save" button.

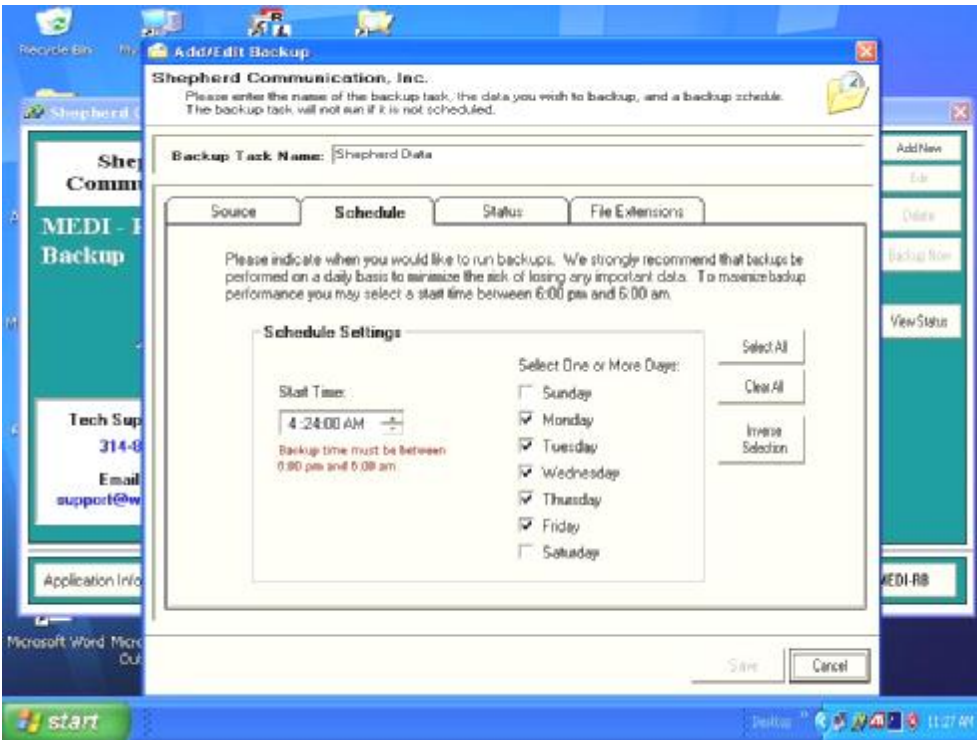


Figure 25. The Schedule Tab

## THE STATUS TAB

The Status tab (Figure 26) will reflect the Backup Name, File Name, day of the week, and the date and time that this file was successfully backed-up. Always note the time and the Status. If the status displays anything other than complete, the user should attempt to backup the folder again as soon as possible.

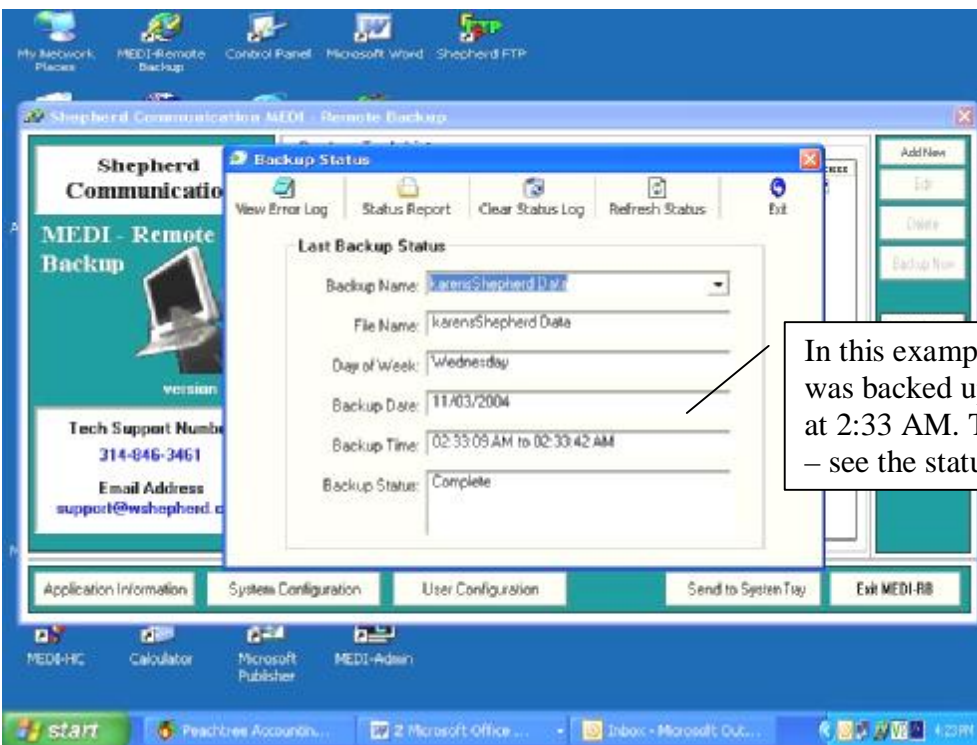


Figure 26. Backup Status Screen

## THE FILE EXTENSIONS TAB

The File Extensions tab displays all of the file extensions that will be excluded in your scheduled backup. The default will show all of these files extensions with a checkmark in front of them indicating that they will be excluded from any backup. The user should click on the box (to delete the checkmark) if they want to include this type of file in the backup.

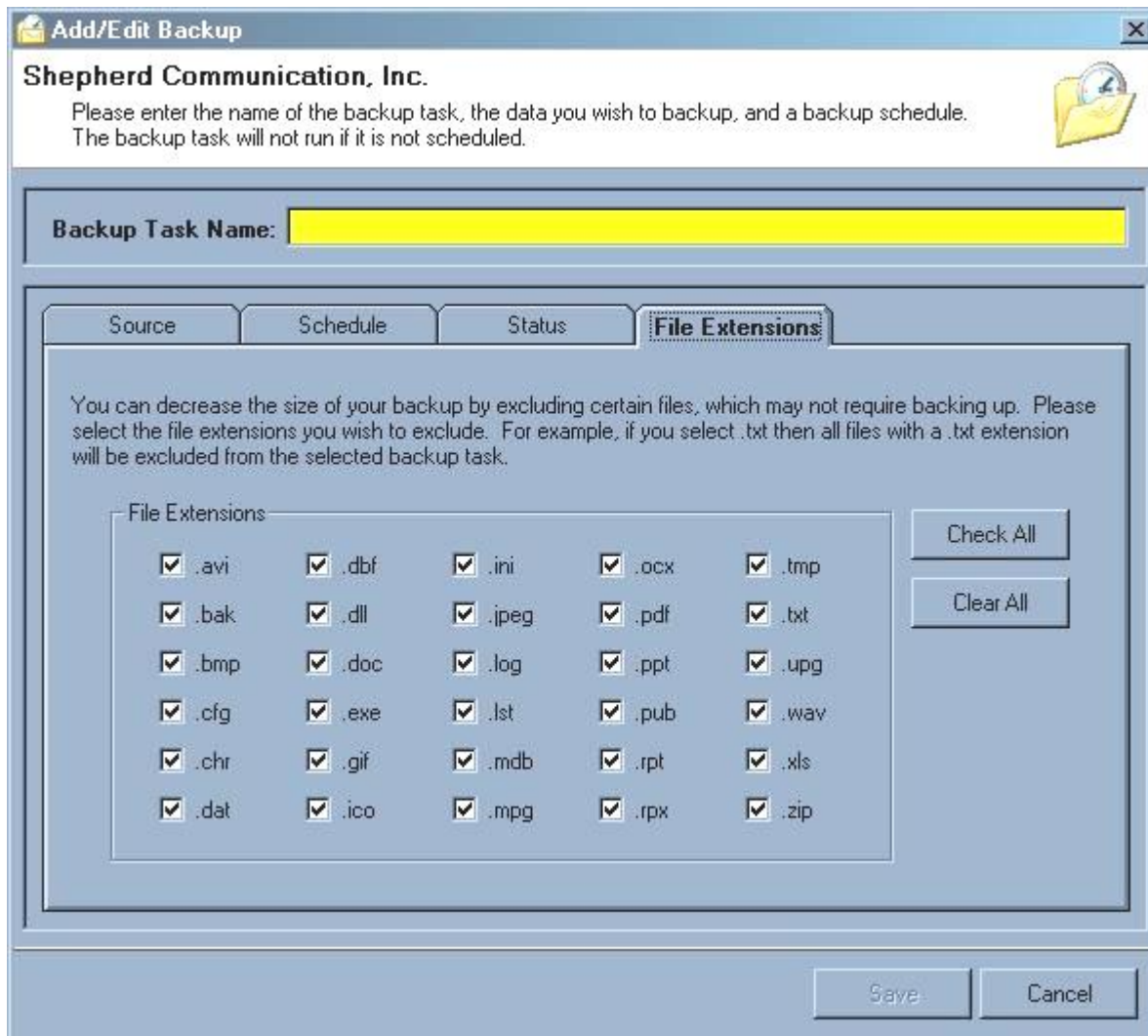


Figure 27. File Extensions Screen

## THE VIEW STATUS BUTTON

Returning to the Main Screen and clicking on the “VIEW STATUS” button (Figure will display the following screen complete with the availability to print a report, view any possible errors, clear the status log, and refresh the status.

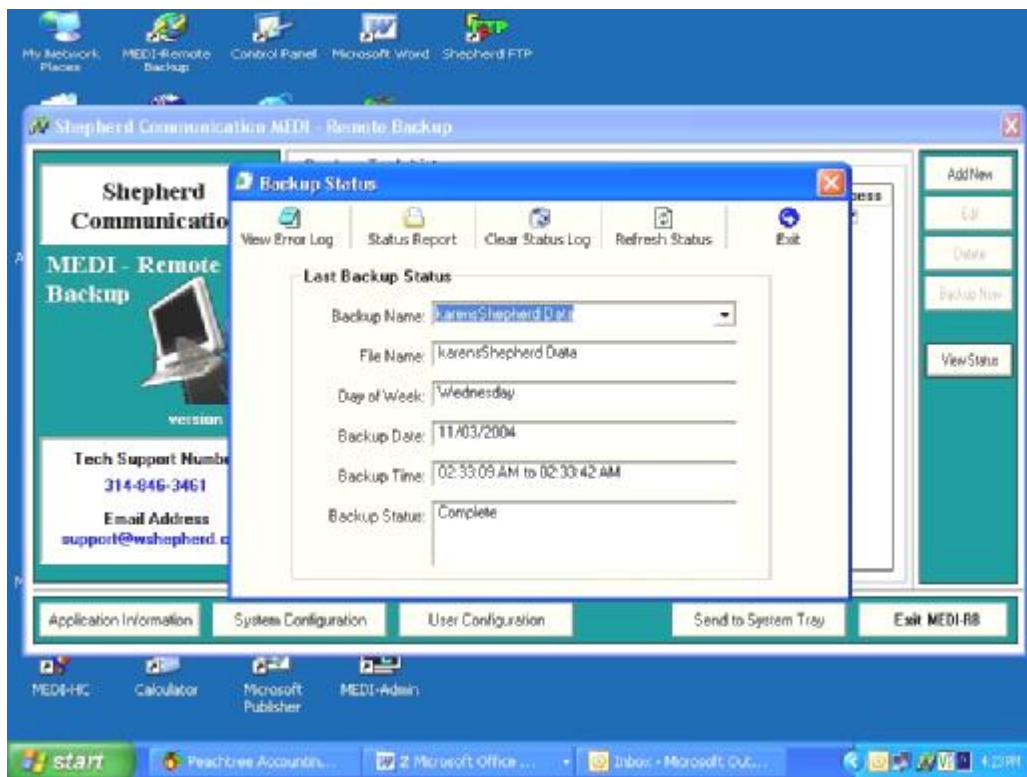


Figure 28. View Status Screen

## VIEW ERROR LOG BUTTON

This button will display any error reports that are associated with the MEDI-RB. In the event that you experience an error in the MEDI-RB program, the user should go to the “View Status” and click on “View Error Log” and then print this error log and fax it to Shepherd Communication Inc.

## STATUS REPORT BUTTON

This button will display a report showing status of all the backups that have been attempted with the MEDI-RB program. The following example (Figure 29) shows that all of the attempted backups have been successful.

11/12/2004 3:40:25

### karensShepherd Data Backup Log

Compression Start Time	FTP Upload Start Time	FTP Upload End Time	Backup Status
11/11/2004 02:33 AM	11/11/2004 02:33 AM	11/11/2004 02:33 AM	Complete
11/10/2004 04:35 PM	11/10/2004 04:35 PM	11/10/2004 04:35 PM	Complete
11/10/2004 02:33 AM	11/10/2004 02:33 AM	11/10/2004 02:33 AM	Complete
11/09/2004 02:33 AM	11/09/2004 02:33 AM	11/09/2004 02:33 AM	Complete
11/08/2004 02:33 AM	11/08/2004 02:33 AM	11/08/2004 02:33 AM	Complete
11/05/2004 02:33 AM	11/05/2004 02:33 AM	11/05/2004 02:33 AM	Complete
11/04/2004 02:33 AM	11/04/2004 02:33 AM	11/04/2004 02:33 AM	Complete
11/03/2004 02:33 AM	11/03/2004 02:33 AM	11/03/2004 02:33 AM	Complete
11/02/2004 02:33 AM	11/02/2004 02:33 AM	11/02/2004 02:33 AM	Complete
11/01/2004 02:33 AM	11/01/2004 02:33 AM	11/01/2004 02:33 AM	Complete
10/29/2004 02:33 AM	10/29/2004 02:33 AM	10/29/2004 02:33 AM	Complete
10/27/2004 09:33 AM	10/27/2004 09:33 AM	10/27/2004 09:33 AM	Complete

Each line of this report will identify the date of and time the backup began – when it was uploaded to the off site backup server and the status of the backup. You should always see complete. If the status says ‘Incomplete’, you may want to click on the BACK Up NOW button on the MEDI-RB Main Screen and force a backup of your data.

Figure 29. Status Report

## CLEAR STATUS LOG

This button will clear the status report log.