CGM LYTEC New Installation Guide

December 2022

CGM LYTEC

Practice Management and EHR

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Product

CGM Lytec, 2023

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Table of Contents

Chapter 1 - CGM LYTEC Hardware and Software Requirements

This chapter identifies the hardware and software requirements for this release.

Windows 11 Support
CGM LYTEC 2022 is supported on Windows 11 Pro and Enterprise.

CGM LYTEC 2023 Single-User Hardware and Software Requirements

Hardware - Minimum Required

CPU Type	Intel Pentium IV 4.2GHz or faster
RAM (Memory)	2GB
Storage Space available	4GB*
Network Card (NIC)	100Mbps
Display Monitor	1024x768 (1280x800 for widescreen displays)

Hardware - Recommended

CPU Type	Pentium D 2.6GHz or faster
RAM (Memory)	8GB
Storage Space available	8GB*
Network Card (NIC)	1Gbps
Display Monitor	1024x768 (1280x800 for widescreen displays)

*Your database will grow as you add data to your practice, increasing the amount of space needed on the hard drive.

Workstation Operating System - Supported

- Windows 10 Pro/Enterprise (Windows 10 S and Home are NOT supported)
- Windows 11 Pro/Enterprise (Windows 11 Home is NOT supported)

Internet - Required

High-speed Cable, DSL, or Satellite Internet service.

Database - Version of SQL

CGM LYTEC Single User version uses SQL Server Express. With this application, the size of your database is limited to 10GB. SQL Server 2017 Express will use, at most, 1GB of RAM.

For SQL Server 2019 on Windows

SQL Server 2019 is NOT supported on Windows 8.1 or Windows Server 2012 or Windows Server 2012 R2.

For information on which versions of SQL Server are supported on versions of Windows Server and Windows, see https://learn.microsoft.com/en-us/troubleshoot/sql/general/use-sql-server-in-windows

CGM LYTEC 2023 Professional or Multi-User Hardware and Software Requirements

Server Hardware - Minimum Required

CPU Type	Intel Pentium IV 4.3GHz or faster
RAM (Memory)	2GB
Storage Space available	6GB*
Network Card (NIC)	100Mbps
Display Monitor	1024x768 (1280x800 for widescreen displays)

Server Hardware - Recommended

CPU Type	Core 2 - 2.4GHz or faster
RAM (Memory)	8GB
Storage Space available	8GB*
Network Card (NIC)	1Gbps
Display Monitor	1024x768 (1280x800 for widescreen displays)

*Your database will grow as you add data to your practice, increasing the amount of space needed on the hard drive.

Server Operating System - Supported

- Windows Server 2012 (64 Bit) (Microsoft support end of life is October 10, 2023)
- Windows Server 2012 R2 (64 Bit) (Microsoft support end of life is October 10, 2023)
- Windows Server 2016 Standard (64 Bit), Datacenter, Essentials
- Windows Server 2019 Standard
- Windows 10 Pro/Enterprise (Windows 10 S and Home are NOT supported)
- Windows 11 Pro/Enterprise (Windows 11 Home is NOT supported)

Network - Recommended

Consult with a licensed network vendor for proper wiring for your business computing environment. Wireless networks are not recommended. If a wireless network is the only option, eMDs requires the use of Terminal Services/RDP/ Thin Clients and does not support a direct connected wireless workstation.

Internet - Required

High-speed Cable, DSL, or Satellite Internet service.

Database - Version of SQL

Uses SQL Server 2017 Express. With this application, the size of your database is limited to 10GB. In addition, SQL Server 2017 Express will use, at most, 1GB of RAM.

For SQL Server 2019 on Windows

SQL Server 2019 is NOT supported on Windows 8.1 or Windows Server 2012 or Windows Server 2012 R2.

For information on which versions of SQL Server are supported on versions of Windows Server and Windows, see https://learn.microsoft.com/en-us/troubleshoot/sql/general/use-sql-server-in-windows

Workstation Hardware - Minimum Required

CPU Type	Intel Pentium IV 2GHz or faster
RAM (Memory)	2GB
Storage Space available	6GB*
Network Card (NIC)	100Mbps
Display Monitor	1024x768 (1280x800 for widescreen displays)

Workstation Hardware - Recommended

CPU Type	Intel Pentium IV 2.6GHz or faster
RAM (Memory)	8GB
Storage Space available	8GB*
Network Card (NIC)	1Gbps
Display Monitor	1024x768 (1280x800 for widescreen displays)

*Your database will grow as you add data to your practice, increasing the amount of space needed on the hard drive.

Workstation Operating System - Supported

- Windows 10 Pro, Enterprise (Windows 10 S and Home are NOT supported)
- Windows 11 Pro/Enterprise (Windows 11 Home is NOT supported)

CGM LYTEC 2023 Client/Server Hardware and Software Requirements

Server Hardware - Minimum Required

CPU Type	Intel Pentium IV 4.3GHz or faster
RAM (Memory)	4GB
Storage Space available	6GB*
Network Card (NIC)	1Gbps
Display Monitor	1024x768 (1280x800 for widescreen displays)

Server Hardware - Recommended

CPU Type	Core 2 - 2.4GHz or faster
RAM (Memory)	8GB
Storage Space available	8GB*
Network Card (NIC)	1Gbps
Display Monitor	1024x768 (1280x800 for widescreen displays)

*Your database will grow as you add data to your practice, increasing the amount of space needed on the hard drive.

Server Operating System - Supported

- Windows Server 2012 (64 Bit) (Microsoft support end of life is October 10, 2023)

- Windows Server 2012 R2 (64 Bit) (Microsoft support end of life is October 10, 2023)

- Windows Server 2016 Standard (64 Bit), Datacenter, Essentials

- Windows Server 2019 Standard

- Windows 11 Pro/Enterprise (Windows 11 Home is NOT supported)

Microsoft SQL Database - Supported

- Microsoft SQL 2019**

- Microsoft SQL 2017

   *CGM LYTEC Client/Server will continue to use Microsoft SQL 2012 if it is already installed; however, certain new CGM LYTEC features will not work with SQL 2012. SQL 2012 is no longer supported by Microsoft nor CGM so it must be upgraded. To upgrade SQL it will need to be purchased and installed separately.

For SQL Server 2019 on Windows

SQL Server 2019 is NOT supported on Windows 8.1 or Windows Server 2012 or Windows Server 2012 R2.

For information on which versions of SQL Server are supported on versions of Windows Server and Windows, see https://learn.microsoft.com/en-us/troubleshoot/sql/general/use-sql-server-in-windows

Network - Recommended

Consult with a licensed network vendor for proper wiring for your business computing environment. Wireless networks are not recommended. If a wireless network is the only option, eMDs requires the use of Terminal Services/RDP/ Thin Clients and does not support a direct connected wireless workstation.

Internet - Required

High-speed Cable, DSL, or Satellite Internet service.

Workstation Hardware - Minimum Required

CPU Type	Intel Pentium IV 2GHz or faster
RAM (Memory)	4GB
Storage Space available	8GB*
Network Card (NIC)	100Mbps
Display Monitor	1024x768 (1280x800 for widescreen displays)

Workstation Hardware - Recommended

CPU Type	Core 2 2.4GHz or faster
RAM (Memory)	8GB
Storage Space available	8GB*
Network Card (NIC)	1Gbps
Display Monitor	1024x768 (1280x800 for widescreen displays)

*Your database will grow as you add data to your practice, increasing the amount of space needed on the hard drive.

Workstation Operating System - Supported

• Windows 10 Pro, Enterprise (Windows 10 S and Home are NOT supported)

• Windows 11 Pro/Enterprise (Windows 11 Home is NOT supported)

CGM LYTEC 2023 Supported Operating Systems

| | SERVER | | WORKSTATION | |
| | Version of CGM LYTEC 2023 | | Version of CGM LYTEC 2023 | |
OPERATING SYSTEM	Client/Server	Single-User, Professional, or Multi-User	Client/Server	Single-User, Professional, or Multi-User
Windows 10 Pro, Enterprise*			**Y**	
Windows 11 Pro/Enterprise	**N/A**	**N/A**		**Y**
Windows Server 2012/2012 R2**, 2016 Standard, Datacenter, Essentials**			**Y**	
Windows Server 2019 Standard	**Y**	**N/A**		**Y**

*Windows 10 S and Home are NOT supported.

**Microsoft support end of life is October 10, 2023

Windows 11 Pro/Enterprise (Windows 11 Home is NOT supported)

Firewall settings

The following Platform Services APIs must all be allowed:

identity.emdscloud.com	eligibilitybenefits.emdscloud.com
licensing.emdscloud.com	ppsmobile.emds.com
terminology.emdscloud.com	api.emdscloud.com

In addition, the two below are required if you are using CGM CONNECTION:

https://cnx.cgmus.com/

https://cnx-mh.cgmus.com/

Anti-Virus Software

An anti-virus solution should be installed with the CGM-recommended configurations. The application folder and client folder must be excluded from real-time/on-access scanning. CGM recommends scheduled scans when users are not in the system. Ensure that exclusions are set properly. CGM recommends turning off Windows Defender and other anti-virus programs during the CGM LYTEC Installation, and with Revenue Management (RM) installation and updates; otherwise, it may interact with files and some files may not get installed. Any anti-virus solution that does not allow for exclusions should not be installed. If asked by Support, you must be able to show the exclusions.

Important New Backup Information

IMPORTANT: It is highly recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Lytec SharedData and store it safely offsite. In this way, in case your server fails or you have to set up a new server, you can restore from that SharedData backup. Registration of CGM LYTEC is tied to the server, so if you do not have your Lytec SharedData backed up, you will need to contact CGM Support to get your registration deactivated so it can be entered again. Perform this onetime backup in addition to the daily practice files backup, which should be performed and stored offsite. Under the new licensing model, the software may only be installed on one server. If the software is installed on additional servers, an error message will appear informing you that the customer is already registered and it will not be functional.

To back up your SharedData:

1. Close any open practices in Lytec.
2. Click the "L" in the top left corner of the Lytec screen.
3. Click Backup and Restore Database.
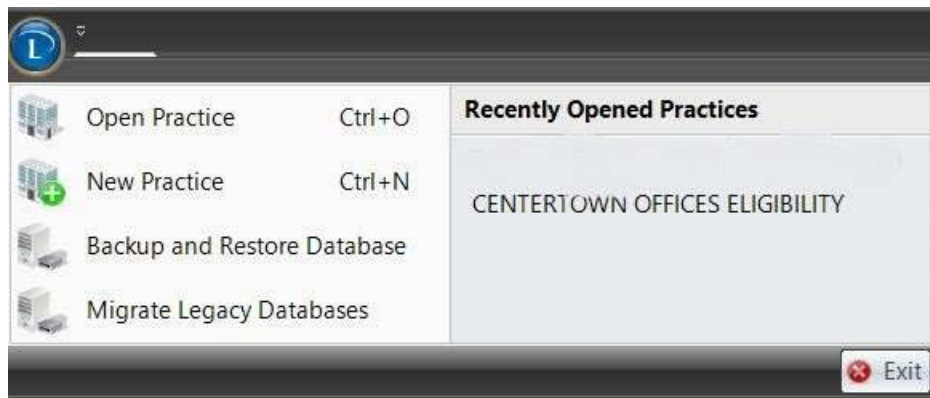
Figure 1. CGM LYTEC screen

The Confirm SQL SysAdmin screen opens.

Figure 2. Confirm SQL SysAdmin screen

4. Enter your credentials and click the OK button. The Manage Backups screen opens.
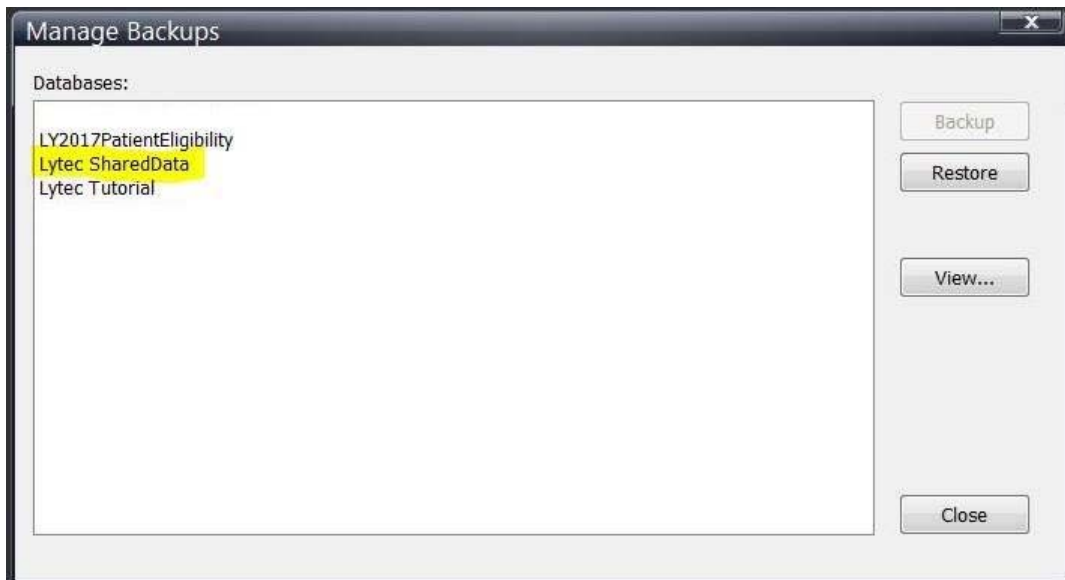
Figure 3. Manage Backups screen

5. Select Lytec SharedData and click the Backup button.

6. Follow the remaining prompts to create the backup.

Revenue Management

Revenue Management uses Advantage Local Server. Advantage Local Server is limited to a maximum of five concurrent users. If you want to have more than five users accessing Revenue Management at the same time, you will need to upgrade to Advantage Database Server. Contact your Value Added Reseller for more information.

MPIC System Requirements

Hardware requirements

CPU (Processor)	Equivalent of Intel Quad Core Xeon 1.6GHz
RAM (Memory)	8GB
Storage Array Type	RAID-1
Network Card (NIC)	1Gbps (cannot be a teamed network card)
Hard Drive	At least 30GB

Software requirements

MPIC must be installed at the same location as your SQL server. It does not need to be installed on any of your workstations. Nor does it have to be dedicated.

You may use a virtual server with MPIC.

With Practice Partner 11.2 and newer

- Windows Server 2012 and R2 (Microsoft support end of life is October 10, 2023)

- Windows Server 2016 Standard, Datacenter, Essentials

- Windows Server 2019 Standard

- Lytec 2014 SP1 or newer

- SQL Server Express 2017 or 2019*

*SQL server express is NOT installed with MPIC. For Lytec, MPIC will use the version of SQL Server Express or Standard that Lytec is using.

For SQL Server 2019 on Windows

SQL Server 2019 is NOT supported on Windows 8.1 or Windows Server 2012 or Windows Server 2012 R2.

For information on which versions of SQL Server are supported on versions of Windows Server and Windows, see https://learn.microsoft.com/en-us/troubleshoot/sql/general/use-sql-server-in-windows

CGM LYTEC MD 2023 Supported Operating Systems

OPERATING SYSTEM	SERVER	WORKSTATION	DATABASE
	Version of CGM LYTEC 2023	Version of CGM LYTEC 2023	Version of SQL****
	Client/Server	Client/Server	SQL Server 2017 Standard Edition
Windows Server 2012 and R2***, Windows Server 2016 Standard, Datacenter, Essentials, Windows Server 2019 Standard	Y	Y	Y
Windows 10 Pro, Enterprise* Windows 11 Pro/Enterprise**	N/A	Y	N

*CGM LYTEC MD is NOT supported for Windows 10 Home version for Patient Records and Medical Billing. Windows 10 S is NOT supported.

**Windows 11 Pro/Enterprise (Windows 11 Home is NOT supported)

***Microsoft support end of life is October 10, 2023

******For SQL Server 2019 on Windows**

SQL Server 2019 is NOT supported on Windows 8.1 or Windows Server 2012 or Windows Server 2012 R2.

For information on which versions of SQL Server are supported on versions of Windows Server and Windows, see https://learn.microsoft.com/en-us/troubleshoot/sql/general/use-sql-server-in-windows

For a complete list of all system requirements for CGM LYTEC MD, see CGM LYTEC MD System Requirements in the System Administration and System Requirements section of the CGM LYTEC 2023 Documentation page in Salesforce.

CGM LYTEC MD Best Practices

eMDs provides both requirements and recommendations for CGM LYTEC MD best practices.

Required best practices

The following table lists the required best practices for using CGM LYTEC MD.

Topic	Comments
CGM LYTEC MD Application Folder	The CGM LYTEC MD application folder must be on its own logical partition.
	The logical drive on your application server must be a drive letter that is not reserved by any workstation (P: is the recommended drive letter).
	The drive letter where the application folder resides on the application server must be available to be mapped on every CGM LYTEC MD computer.
Backups	Backups are required. eMDs recommends a tape rotation with periodic offsite backups.
	eMDs CGM LYTEC MD does not install, support, or maintain backup solutions. This is the responsibility of the customer.
	eMDs CGM LYTEC MD cannot be held responsible for data loss incurred due to incomplete or corrupt backups.
Anti-virus Solutions	An anti-virus solution must be installed with the eMDs-recommended configurations.
	The application folder and client folder must be excluded from real-time/on-access scanning. eMDs recommends scheduled scans when users are not in the system.
	Windows Defender is installed for versions 8.0 and above and is recommended by eMDs. Ensure that exclusions are set. eMDs recommends turning off Windows Defender during installation, otherwise it may interact with files and some files may not get installed.
	Trend Micro and CA eTrust are unapproved anti-virus solutions that may cause instability in the Practice Partner application.
	Any anti-virus that does not allow for exclusions should not be installed. If asked by Support, you must be able to show the exclusions.

Topic	Comments
Oracle or SQL Database Platforms	Customers using the Oracle or SQL database platforms must have qualified DBA services. This can be a full-time employee of the organization or a contractor. eMDs does offer a variety of DBA service solutions as additional service contract fees.
Teamed Network Interface Cards	The use of teamed network interface cards (NICs) is not supported.
Domain/Active Directory Infrastructure	CGM LYTEC MD requires a domain/Active Directory infrastructure.
New Technology File System (NTFS)	NTFS is required due to the necessity to set file permissions.
Microsoft Security	The following Microsoft security features and software must be disabled. • User Account Control (UAC) • Data Execution Prevention (DEP) • Windows Firewall
Permissions	The following items' permissions must be set to full control on the ppart drive. • Network Service • System • Domain users • Domain Admin

Recommended best practices

The following table lists the recommended best practices for using CGM LYTEC MD.

Topic	Comments
Windows Pagefile	The Windows pagefile should be on its own disk controller and should be two times the amount of RAM in the machine.
Domain Name Servers (DNS)	DNS should be on the same subnet as the CGM LYTEC MD servers.
Hardware	eMDs highly recommends hardware from experienced and trusted vendors such as HP, Dell, and IBM. eMDs strongly discourages White-box servers.
Operating System Partition	Provision enough space on your operating system partition for growth. eMDs recommends 32GB+ for your operating system partition.

Topic	Comments
Firewalls	Customers should have a hardware-level firewall protecting their network.

CGM LYTEC 2023 Installation Overview

This document contains instructions for all versions of CGM LYTEC 2023, including CGM LYTEC MD. Please carefully review the instructions for your version of CGM LYTEC 2023 and hardware and software requirements (see "CGM LYTEC Hardware and Software Requirements" on page 1) before installing the software.

Upgrade to this version of CGM LYTEC	Use these instructions
CGM LYTEC Single-User	"CGM LYTEC Single-User Installation" on page 17.
CGM LYTEC Professional or Multi-User	"CGM LYTEC Professional or Multi-User Installation " on page 23.
CGM LYTEC Client/Server	"CGM LYTEC Client/Server Installation" on page 31.
CGM LYTEC MD	"CGM LYTEC MD Installation" on page 39.

Chapter 2 - CGM LYTEC Single-User Installation

In this chapter, you will learn how to install CGM LYTEC for a single-user installation.

Before You Begin

Use an administrator account with full privileges when installing the software.

In some instances, you may have to restart the CGM LYTEC installation after the .NET framework is installed. If this occurs, the installation will close after installing .NET. Restart the installation. This situation can occur with older versions of the .NET framework on the PC.

If you are extracting the ISO or webinstall file to the hard drive prior to installing, extract to a folder that is immediately off the root drive and the folder name must be shorter than 8 characters. For example, c:\Install. Do NOT use a long folder name.

Reboot your workstation or server.

Make sure that Windows PowerShell is installed (if installing via webinstall). To see if it is installed, click **Start** and then **Run**. Type Powershell and press ENTER. If Windows PowerShell is not installed, follow the instructions to install. See "Installing Windows PowerShell" on page 77.

Important Installation note

eMDs highly recommends that you install SQL Server 2017 using the automatic process in the CGM LYTEC installer. However, if you choose to install SQL Server 2017 manually, you MUST install/enable (depending on your operating system) .NET 3.5 FIRST. Failure to do so will cause issues with eligibility verification.

Prior to Installation

1. If SQL Management Studio Express is installed, uninstall it prior to installing CGM LYTEC. For steps to do this, see "Uninstalling SQL Management Studio Express 2005" on page 71.

If you are unsure, follow the steps for uninstalling it. If it does not show up on the list of installed programs, then it is not installed.

2. Make sure your Windows operating system has the latest service pack installed. This will be checked during installation.

Linking to Other Applications

You can link CGM LYTEC to certain other applications, such as Practice Partner using MPIC. Refer to "MPIC" on page 79 for more information on MPIC and how to download it.

Note: You must install CGM LYTEC prior to installing MPIC.

Installation

1. Disable UAC (User Account Control) prior to installing on each workstation. Once it is disabled, you will need to reboot the computer for the changes to take effect. In addition, disable any anti-virus applications prior to installation. Be sure to re-enable both UAC and anti-virus applications after installation.

2. Download the ISO for CGM LYTEC MD from the CGM LYTEC and CGM LYTEC MD Download Links page in Support Center.

3. Extract the ISO and launch autorun.exe. The **I**nstallation screen appears. eMDs recommends that you do NOT attempt to install using any of the programs with the extension *.msi, such as LYTEC.msi. Doing so may result in failure of the installation. Always use autorun.exe.

4. On the CGM LYTEC Installation screen, click **Install CGM LYTEC**. The CGM LYTEC 2023 Installation – Welcome screen appears.
5. Click the **Next** button.
6. The End User License Agreement screen appears. Review the terms of the agreement and click **I accept the agreement**.
7. Click the **Next** button. The Installation Type screen appears. Select the **CGM LYTEC Single User** button.
8. Click the **Next** button. The Select CGM LYTEC Server Components screen appears. Select which components you want to install.

SQL Server: The database engine used by CGM LYTEC.

CGM LYTEC Client: Use this CGM LYTEC software to enter information for your practice.

Crystal Reports: Use this application to print and generate reports. You must select this check box for a complete installation of CGM LYTEC.

Predefined Forms: Forms you can use with CGM LYTEC.
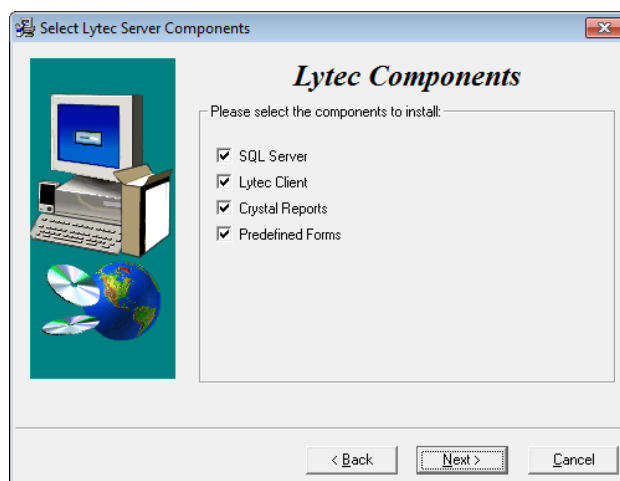
Figure 4. Select CGM LYTEC Server Components screen

9. Click the **Next** button. The Select Target Folder screen appears.
10. Click the **Next** button. The Data Folder appears. Either leave the default or click the Browse button to find a different folder.
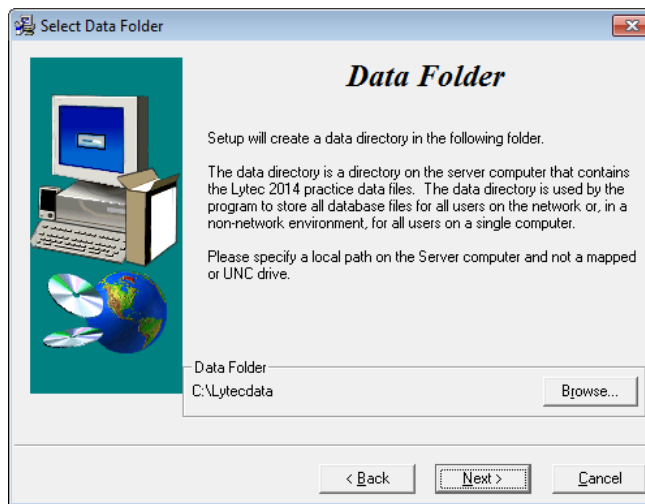
Figure 5. Select Data Folder screen

11. Click the **Next** button. The SQL Server Setup screen appears if you selected SQL Server on the Select Components to Install screen.
    During the installation, CGM LYTEC will install SQL Server Express in the Data Folder and use it to manage your practice database. Use this screen to set up the SQL instance that CGM LYTEC will use for its practice database. You will need the information you enter here when you start CGM LYTEC and specify the default SQL credentials.

SQL Server 2017 password requirements:

- The password does not contain all or part of the account name of the user.
- The password is at least eight characters long.
- The password contains characters from three of the following four categories:
- Latin uppercase letters (A through Z)
- Latin lowercase letters (a through z)
- Base 10 digits (0 through 9)
- Non-alphanumeric characters such as: exclamation point (!), dollar sign ($), number sign (#), or percent (%).
- Passwords can be up to 128 characters long. You should use passwords that are as long and complex as possible.

Figure 6. SQL Server Setup screen

Please note the password requirements above. Failure to create a password that meets these requirements WILL cause the installation to fail.

IMPORTANT: For security purposes, eMDs recommends that you change the default shown here to something unique, especially if you have more than one CGM LYTEC server on your network.

12. Click the **Next** button. The Start Installation screen appears.
13. Click the **Next** button. The Installing screen appears and tracks the progress of the install.
14. Reboot the computer when the installation is complete.
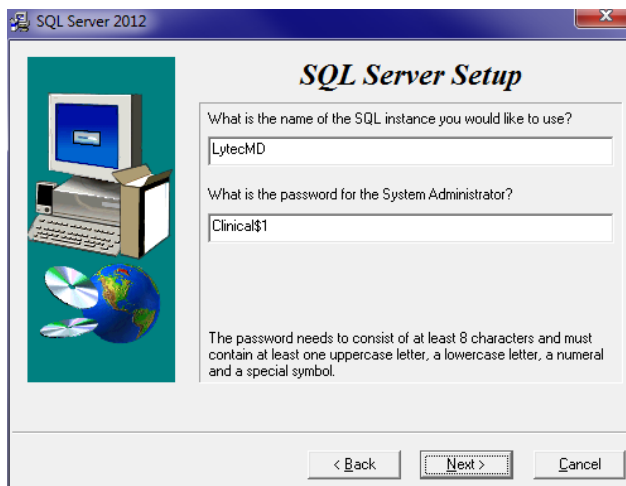15. Start CGM LYTEC and register the program.
16. Specify the default SQL server credentials. For step by step instructions, go to "Specifying the Default SQL Server Credentials" on page 69.
17. Create your practice. Follow the steps at "New Practice" on page 69.

Account Registration

Enter the information on this screen that you received from your VAR (Value-Added Reseller). Once this is done, you can use Lytec.

Figure 7. Account Registration screen

Important: The Customer Account ID is case-sensitive.

Note: Lytec requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use Lytec for up to 30 days without your Internet connection. After this, you will receive a warning message that you have seven days to connect before you are locked out of Lytec.

Recommendation

It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Lytec SharedData and store it safely offsite. In this way, in case your server fails or you have to set up a new server, you can restore from that backup. Registration of Lytec 2023 is tied to the server, so if you do not have your Lytec SharedData backed up, you will need to contact your VSE or Support to get your registration reactivated. Perform this one-time backup in addition to the daily practice files backup, which should be performed and stored offsite.

For steps to back up your SharedData, see "Important New Backup Information " on page 8.

Account Registration Process Troubleshooting

If you have verified that you do not have a prior installation of Lytec 2023 on your server and have ensured that the IsRegistered check box is removed, but still receive the following error that the SalesForce account is already registered:

Figure 8. Error message

Then, check for a firewall or router that may be blocking some of the Platform Services APIs. The following must all be allowed:

identity.emdscloud.com	eligibilitybenefits.emdscloud.com
licensing.emdscloud.com	ppsmobile.emds.com
terminology.emdscloud.com	api.emdscloud.com

In addition, the two below are required if you are using CGM CONNECTION:

https://cnx.cgmus.com/

https://cnx-mh.cgmus.com/

Lytec Passwords

In Lytec 2023 and newer, Passwords are case sensitive.

Chapter 3 - CGM LYTEC Professional or Multi-User Installation

In this chapter, you will learn how to install CGM LYTEC for Professional or Multi-User.

Before You Begin

Use an administrator account with full privileges when installing the software.

In some instances, you may have to restart the CGM LYTEC installation after the .NET framework is installed. If this occurs, the installation will close after installing .NET. Restart the installation. This situation can occur with older versions of the .NET framework on the PC.

If you are extracting the ISO or webinstall file to the hard drive prior to installing, extract to a folder that is immediately off the root drive and the folder name must be shorter than 8 characters. For example, c:\Install. Do NOT use a long folder name.

Reboot your server or workstation.

Important Installation note

eMDs highly recommends that you install SQL Server 2017 using the automatic process in the CGM LYTEC installer. However, if you choose to install SQL Server 2017 manually, you MUST install/enable (depending on your operating system) .NET 3.5 FIRST. Failure to do so will cause issues with eligibility verification.

Prior to Installation

1. If SQL Management Studio Express is installed on your server computer, uninstall it prior to installing CGM LYTEC. For steps to do so, see "Uninstalling SQL Management Studio Express 2005" on page 71.

If you are unsure, follow the steps for uninstalling it. If it does not show up on the list of installed programs, then it is not installed.

2. Make sure your Windows operating system has the latest service pack installed. This will be checked during installation.

Linking to Other Applications

You can link CGM LYTEC to certain other applications, such as Practice Partner using MPIC. Refer to for more information on MPIC and how to download it.

Note: You must install CGM LYTEC prior to installing MPIC.

Overview

When installing CGM LYTEC Professional or Multi-User, first designate a computer as the server. For the purpose of this installation, a server is the computer where your data resides. You must know the name of the server to continue with installation and setup.

A workstation is a computer that you use to run CGM LYTEC but does not house the data files. It accesses the data on the server across the network.

There are three major steps for installing CGM LYTEC Professional or Multi-User on a network:

1. Install and set up CGM LYTEC on the server.
2. Create a new practice.
3. Install and set up CGM LYTEC on each workstation.

These instructions take you through each step.

Server Installation and Setup

Installing on the Server

1. Disable UAC (User Account Control) prior to installing on each workstation. Once it is disabled, you will need to reboot the computer for the changes to take effect. In addition, disable any anti-virus applications prior to installation. Be sure to re-enable both UAC and anti-virus applications after installation.

2. Download the ISO for CGM LYTEC MD from the CGM LYTEC and CGM LYTEC MD Download Links page in Support Center.

3. Extract the ISO and launch autorun.exe. The **I**nstallation screen appears. eMDs recommends that you do NOT attempt to install using any of the programs with the extension *.msi, such as LYTEC.msi. Doing so may result in failure of the installation. Always use autorun.exe.

4. On the CGM LYTEC Installation screen, click **Install CGM LYTEC**. The CGM LYTEC 2023 Installation – Welcome screen appears.
5. Click the **Next** button. The End User License Agreement screen appears. Review the terms of the agreement and **I accept the agreement**.
6. Click the **Next** button. The Installation Type screen appears. Depending on the product purchased, select either the **CGM LYTEC Multi User** button or the **CGM LYTEC Professional** button.

7. Click the **Next** button. The Installation Mode screen appears. Select **Server**.
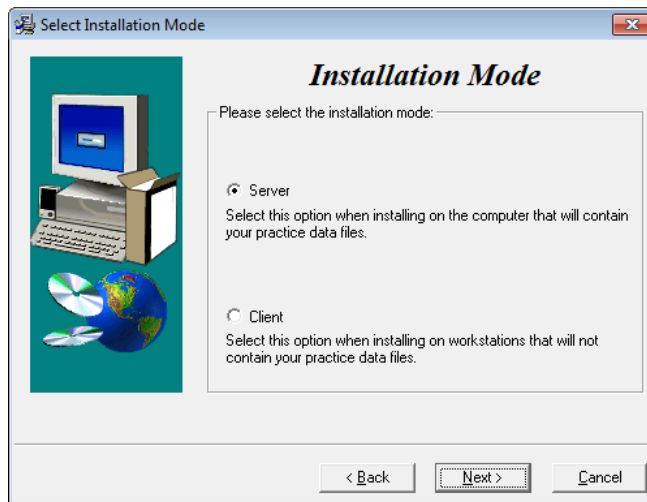
Figure 9. Select Installation Mode screen

8. Click the **Next** button. The Select CGM LYTEC Server Components screen appears. Select the components you want to install.

SQL Server: The database engine used by CGM LYTEC.

CGM LYTEC Client: Use this CGM LYTEC software to enter information for your practice.

Crystal Reports: Use this application to print and generate reports. You must select this check box for a complete installation of CGM LYTEC.

Predefined Forms: Forms you can use with CGM LYTEC.
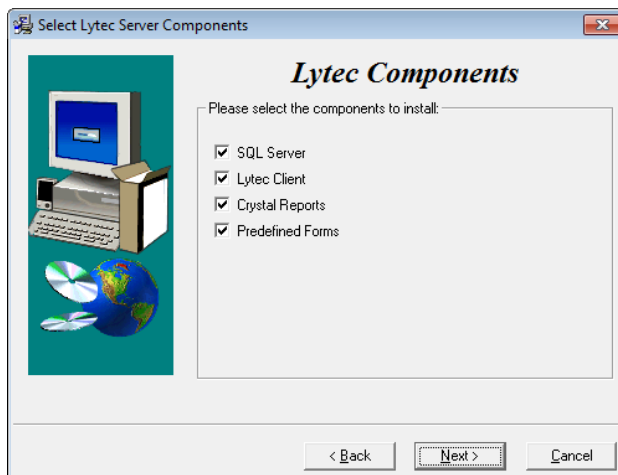
Figure 10. Select CGM LYTEC Server Components screen

9. Click the **Next** button. The Target Folder screen appears.
10. Click the **Next** button. The Data Folder screen appears. Specify the folder on the server where the practice data will be stored.
11. Click the **Next** button. The SQL Server Setup screen appears if you selected the SQL Server check box on the Select Components to Install screen. Enter the name of the SQL instance

and the password for the system administrator. You will need this information when you specify the default SQL instance later, both on the server machine and the client workstations.
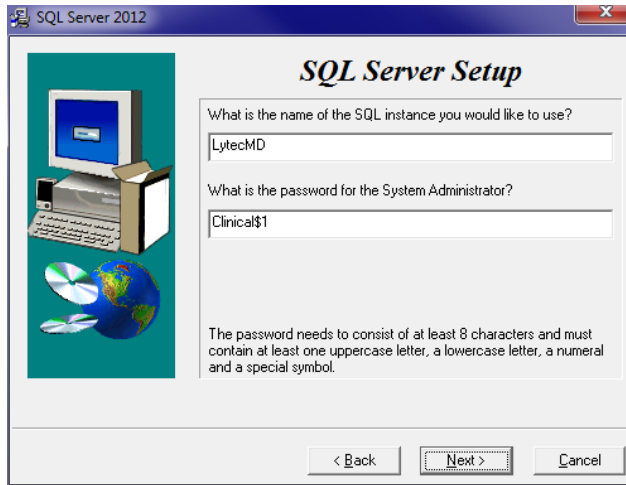
SQL Server 2017 password requirements:

- The password does not contain all or part of the account name of the user.
- The password is at least eight characters long.
- The password contains characters from three of the following four categories:
  •Latin uppercase letters (A through Z)
  •Latin lowercase letters (a through z)
  •Base 10 digits (0 through 9)
  •Non-alphanumeric characters such as: exclamation point (!), dollar sign ($), number sign (#), or percent (%).
- Passwords can be up to 128 characters long. You should use passwords that are as long and complex as possible.

Figure 11. SQL Server Setup screen

Please note the password requirements above. Failure to create a password that meets these requirements WILL cause the installation to fail.

IMPORTANT: For security purposes, eMDs recommends that you change the default shown here to something unique, especially if you have more than one CGM LYTEC server on your network.

12. Click the **Next** button**.** The Start Installation screen appears. This screen will tell you what type of installation you are actually performing, so what it says may differ from what appears here.
13. Click the **Next** button. The Installing screen appears and tracks the progress of the install.
14. Reboot the computer when the installation is complete.
15. Start CGM LYTEC and specify the default SQL server credentials. For step by step instructions, go to "Specifying the Default SQL Server Credentials" on page 69.
16. Create your practice. See "New Practice" on page 69.
17. After you are finished setting up a practice, go to "Workstation Installation and Setup" on page 28 for information on installing and setting up the program on a workstation.

Account Registration

Enter the information on this screen that you received from your VAR (Value-Added Reseller). Once this is done, you can use Lytec.

Figure 12. Account Registration screen

Important: The Customer Account ID is case-sensitive.

Note: Lytec requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use Lytec for up to 30 days without your Internet connection. After this, you will receive a warning message that you have seven days to connect before you are locked out of Lytec.

Recommendation

It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Lytec SharedData and store it safely offsite. In this way, in case your server fails or you have to set up a new server, you can restore from that backup. Registration of Lytec 2023 is tied to the server, so if you do not have your Lytec SharedData backed up, you will need to contact your VSE or Support to get your registration reactivated. Perform this one-time backup in addition to the daily practice files backup, which should be performed and stored offsite.

For steps to back up your SharedData, see "Important New Backup Information " on page 8.

Account Registration Process Troubleshooting

If you have verified that you do not have a prior installation of Lytec 2023 on your server and have ensured that the IsRegistered check box is removed, but still receive the following error that the SalesForce account is already registered:

Figure 13. Error message

Then, check for a firewall or router that may be blocking some of the Platform Services APIs. The following must all be allowed:

identity.emdscloud.com	eligibilitybenefits.emdscloud.com
licensing.emdscloud.com	ppsmobile.emds.com
terminology.emdscloud.com	api.emdscloud.com

In addition, the two below are required if you are using CGM CONNECTION:

https://cnx.cgmus.com/

https://cnx-mh.cgmus.com/

Lytec Passwords

In Lytec 2023 and newer, Passwords are case sensitive.

Workstation Installation and Setup

1. Disable UAC (User Account Control) prior to installing on each workstation. Once it is disabled, you will need to reboot the computer for the changes to take effect. In addition, disable any anti-virus applications prior to installation. Be sure to re-enable both UAC and anti-virus applications after installation.

2. Launch autorun.exe. The CGM LYTEC Installation screen appears. eMDs recommends that you do NOT attempt to install using any of the programs with the extension *.msi, such as LYTEC.msi. Doing so may result in failure of the installation. Always use autorun.exe.

3. On the CGM LYTEC Installation screen, click **Install CGM LYTEC**. The CGM LYTEC 2023 Installation – Welcome screen appears.

4. Click the **Next** button. The End User License Agreement screen appears. Select **I accept the agreement.**

5. Click the **Next** button. The Installation Type screen appears. Depending on the product purchased, select either the **CGM LYTEC Multi User** button or the **CGM LYTEC Professional** button.

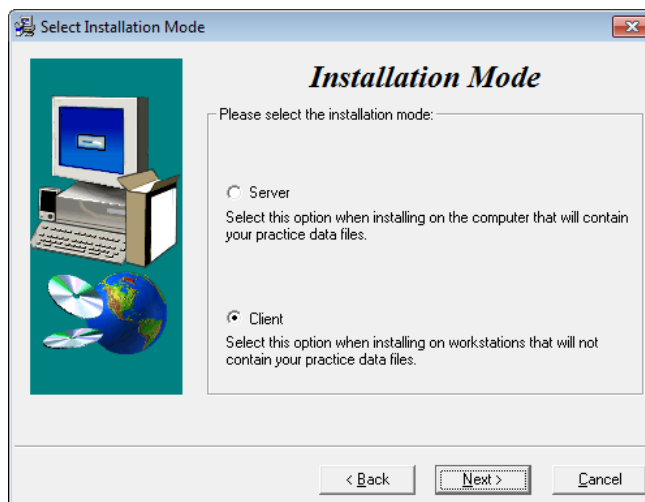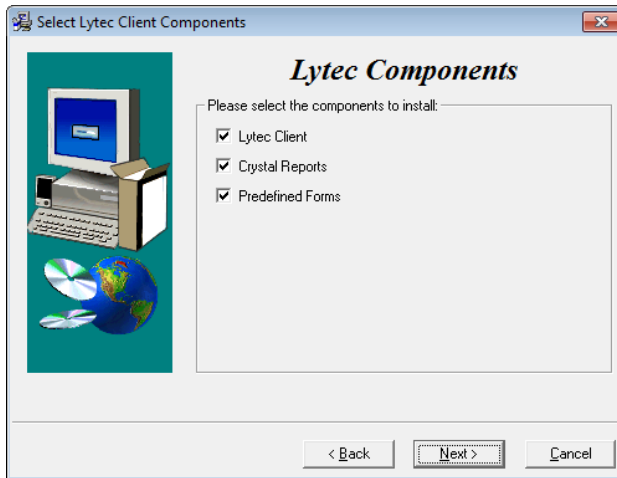6. Click the **Next** button. The Installation Mode screen appears. Select **Client**.

Figure 14. Select Installation Mode screen

7. Click the **Next** button. The Select CGM LYTEC Client Components screen appears. Select the components you want to install.

CGM LYTEC Client: Use this CGM LYTEC software that to enter information for your practice. For the client installation, this option is automatically selected.

Crystal Reports: Use this application to print and generate reports. You must select this check box for a complete installation of CGM LYTEC.

Predefined Forms: Forms you can use with CGM LYTEC.

Figure 15. Select CGM LYTEC Client Components screen

8. Click the **Next** button. The Target Folder screen appears.
9. Click the **Next** button. The Start Installation screen appears.
10. Reboot the computer when the installation is complete.
11. Repeat these steps for each workstation on which you want to install CGM LYTEC.

Account Registration

Enter the information on this screen that you received from your VAR (Value-Added Reseller). Once this is done, you can use Lytec.

Figure 16. Account Registration screen

Important: The Customer Account ID is case-sensitive.

Note: Lytec requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use Lytec for up to 30 days without your Internet connection. After this, you will receive a warning message that you have seven days to connect before you are locked out of Lytec.

Recommendation

It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Lytec SharedData and store it safely offsite. In this way, in case

your server fails or you have to set up a new server, you can restore from that backup. Registration of Lytec 2023 is tied to the server, so if you do not have your Lytec SharedData backed up, you will need to contact your VSE or Support to get your registration reactivated. Perform this one-time backup in addition to the daily practice files backup, which should be performed and stored offsite.

For steps to back up your SharedData, see "Important New Backup Information " on page 8.

Lytec Passwords

In Lytec 2023 and newer, Passwords are case sensitive.

Chapter 4 - CGM LYTEC Client/Server Installation

In this chapter, you will learn how to install CGM LYTEC for Client/Server use.

Before You Begin

In some instances, you may have to restart the CGM LYTEC installation after the .NET framework is installed. If this occurs, the installation will close after installing .NET. Restart the installation. This situation can occur with older versions of the .NET framework on the PC.

If you are extracting the ISO or webinstall file to the hard drive prior to installing, extract to a folder that is immediately off the root drive and the folder name must be shorter than 8 characters. For example, c:\Install. Do NOT use a long folder name.

If you choose to install SQL Server 2017 manually, you MUST install/enable (depending on your operating system) .NET 3.5 FIRST. Failure to do so will cause issues with eligibility verification.

Reboot your server or workstation.

Installing on a Domain Controller

You no longer need to install SQL Server manually prior to installing CGM LYTEC. eMDs recommends that you simply start the installer and allow it to install SQL automatically. You will be prompted for the Domain Administrator Login and Password at the appropriate time in the procedure.

Prior to Installation

1. If SQL Management Studio Express is installed on your server computer, uninstall it prior to installing CGM LYTEC. For steps to do so, see "Uninstalling SQL Management Studio Express 2005" on page 71.

If you are unsure, follow the steps for uninstalling it. If it does not show up on the list of installed programs, then it is not installed.

2. Make sure your Windows operating system has the latest service pack installed. This will be checked during installation.

Linking to Other Applications

You can link CGM LYTEC to certain other applications, such as Practice Partner using MPIC. Refer to "MPIC" on page 79 for more information on MPIC and how to download it.

Note: You must install CGM LYTEC prior to installing MPIC.

Overview

For the purpose of this installation, a server is the computer where your data resides and is running either Windows Server 2012, Windows Server 2016, or Windows Server 2019 operating system.

You must know the name of the server to continue with the installation and setup. A workstation is a computer that you use to run CGM LYTEC but does not store data. It accesses data on the network server.

There are three major steps for installing CGM LYTEC Client/Server:

1. Install and set up CGM LYTEC on the server.
2. Create a new practice.
3. Install and set up CGM LYTEC on each workstation.

These instructions take you through each step.

Server Installation and Setup

Perform the server installation on a computer with a supported server operating system (Windows Server 2012, Windows Server 2016, or Windows Server 2019) using an administrator account with full privileges.

Installation

1. Disable UAC (User Account Control) prior to installing on each workstation. Once it is disabled, you will need to reboot the computer for the changes to take effect. In addition, disable any anti-virus applications prior to installation. Be sure to re-enable both UAC and anti-virus applications after installation.

2. Download the ISO for CGM LYTEC MD from the CGM LYTEC and CGM LYTEC MD Download Links page in Support Center.

3. Extract the ISO and launch autorun.exe. The **I**nstallation screen appears. eMDs recommends that you do NOT attempt to install using any of the programs with the extension *.msi, such as LYTEC.msi. Doing so may result in failure of the installation. Always use autorun.exe.

4. On the CGM LYTEC Installation screen, click **Install CGM LYTEC**. The CGM LYTEC 2023 Installation – Welcome screen appears.

5. Click the **Next** button. The End User License Agreement screen appears. Review the terms of the agreement and click **I accept the agreement**.

6. Click the **Next** button. The Installation Type screen appears.Select the **CGM LYTEC Client Server** button.

7. Click the **Next** button. The Installation Mode screen appears.
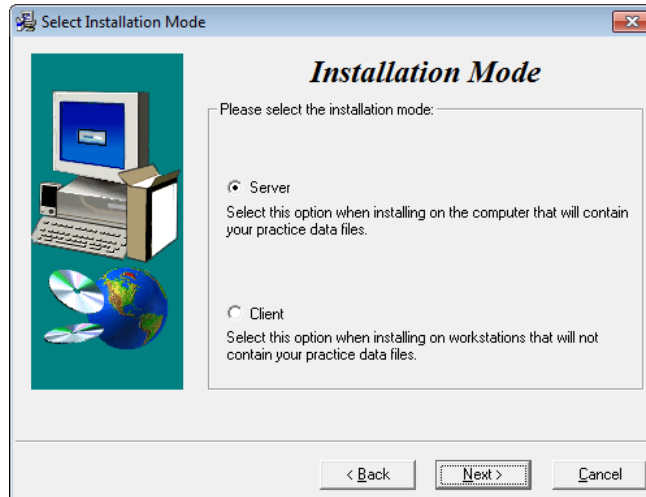
8. Select the **Server** button.

Figure 17. Select Installation Mode screen

9. Click the **Next** button. The Select CGM LYTEC Server Components screen appears. Make your selections.

10. Click the **Next** button.

SQL Server: The database engine used by CGM LYTEC.

CGM LYTEC Client: Use this CGM LYTEC software to enter information for your practice.

Crystal Reports: Use this application to print and generate reports. You must select this check box for a complete installation of CGM LYTEC.

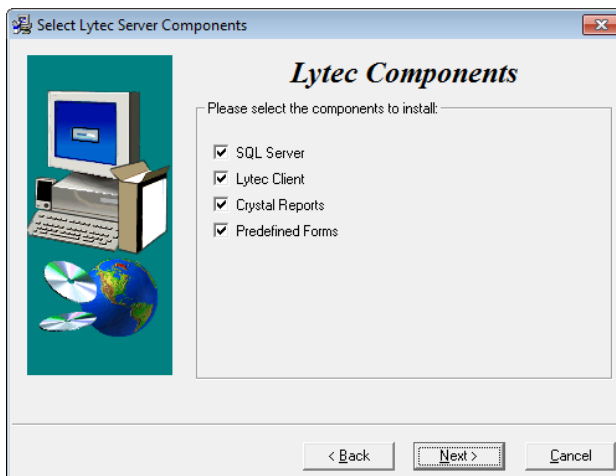**Predefined Forms:** Forms you can use with CGM LYTEC.

Figure 18. Select CGM LYTEC Server Components screen

11. Click the **Next** button. The Select Target Folder screen appears.

12. Click the **Next** button. The Data Folder screen appears.

13. Click the **Next** button. The SQL Server Setup screen appears if you selected SQL Server on the Select Components to Install screen. Enter the name of the SQL instance and the password for the system administrator. You will need this information when you specify the default SQL instance later, for the server database and the client computers.

SQL Server 2017 password requirements:

- The password does not contain all or part of the account name of the user.
- The password is at least eight characters long.
- The password contains characters from three of the following four categories:
  - Latin uppercase letters (A through Z)
  - Latin lowercase letters (a through z)
  - Base 10 digits (0 through 9)
  - Non-alphanumeric characters such as: exclamation point (!), dollar sign ($), number sign (#), or percent (%).
- Passwords can be up to 128 characters long. You should use passwords that are as long and complex as possible.
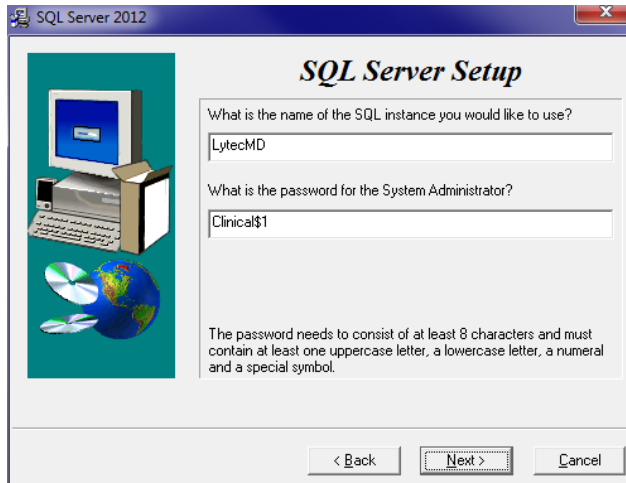
Figure 19. SQL Server Setup screen

Please note the password requirements above. Failure to create a password that meets these requirements WILL cause the installation to fail.

IMPORTANT: For security purposes, eMDs recommends that you change the default shown here to something unique, especially if you have more than one CGM LYTEC server on your network.

14. Click the **Next** button.
    NOTE: If you are installing on a domain controller, you will see an additional screen at this point.

    Enter your domain name and the login and password. By default, the login will appear. To find the domain name for the computer you are installing CGM LYTEC on,

    a. Select **Start**.
    b. Right-click **(My) Computer** and select **Properties**.
    c. Select the **Computer Name** tab and the domain name will be listed to the right of Domain. The password will be that of the Domain Administrator (usually it is just "administrator"). If you do not know the password, contact the Domain Administrator.
    d. Click the **Next** button.
13. Click the **Next** button. The Start Installation screen appears.
14. Click the **Next** button. The Installing screen appears and tracks the progress of the install.
15. Reboot the computer when the installation is complete.
16. Start CGM LYTEC and specify the default SQL server credentials. For step by step instructions, go to "Specifying the Default SQL Server Credentials" on page 69.
17. Create a new practice. See "New Practice" on page 69.
18. After you are finished setting up a practice, go to "Workstation Installation and Setup" on page 36 for information on installing and setting up the program on a workstation.

Account Registration

Enter the information on this screen that you received from your VAR (Value-Added Reseller). Once this is done, you can use Lytec.

Figure 20. Account Registration screen

Important: The Customer Account ID is case-sensitive.

Note: Lytec requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use Lytec for up to 30 days without your Internet connection. After this, you will receive a warning message that you have seven days to connect before you are locked out of Lytec.

Recommendation

It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Lytec SharedData and store it safely offsite. In this way, in case your server fails or you have to set up a new server, you can restore from that backup. Registration of Lytec 2023 is tied to the server, so if you do not have your Lytec SharedData backed up, you will need to contact your VSE or Support to get your registration reactivated. Perform this one-time backup in addition to the daily practice files backup, which should be performed and stored offsite.

For steps to back up your SharedData, see “Important New Backup Information ” on page 8.

Account Registration Process Troubleshooting

If you have verified that you do not have a prior installation of Lytec 2023 on your server and have ensured that the IsRegistered check box is removed, but still receive the following error that the SalesForce account is already registered:

Figure 21. Error message

Then, check for a firewall or router that may be blocking some of the Platform Services APIs. The following must all be allowed:

identity.emdscloud.com	eligibilitybenefits.emdscloud.com
licensing.emdscloud.com	ppsmobile.emds.com

terminology.emdscloud.com	api.emdscloud.com

In addition, the two below are required if you are using CGM CONNECTION:

https://cnx.cgmus.com/

https://cnx-mh.cgmus.com/

Lytec Passwords

In Lytec 2023 and newer, Passwords are case sensitive.

Workstation Installation and Setup

1. Disable UAC (User Account Control) prior to installing on each workstation. Once it is disabled, you will need to reboot the computer for the changes to take effect. In addition, disable any anti-virus applications prior to installation. Be sure to re-enable both UAC and anti-virus applications after installation.

2. Launch autorun.exe. The CGM LYTEC Installation screen appears. eMDs recommends that you do NOT attempt to install using any of the programs with the extension *.msi, such as LYTEC.msi. Doing so may result in failure of the installation. Always use autorun.exe.

3. On the CGM LYTEC Installation screen, click **Install CGM LYTEC**. The CGM LYTEC 2023 Installation – Welcome screen appears.

4. Click the **Next** button. The End User License Agreement screen appears. Review the terms of the agreement and click **I accept the agreement**.

5. Click the **Next** button. The Installation Type screen appears. Select the **CGM LYTEC Client Server** button.

6. Click the **Next** button. The Installation Mode screen appears. Select the **Client** button.
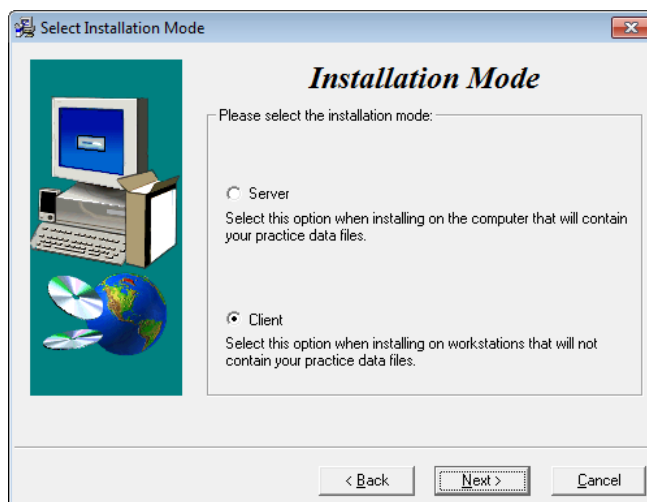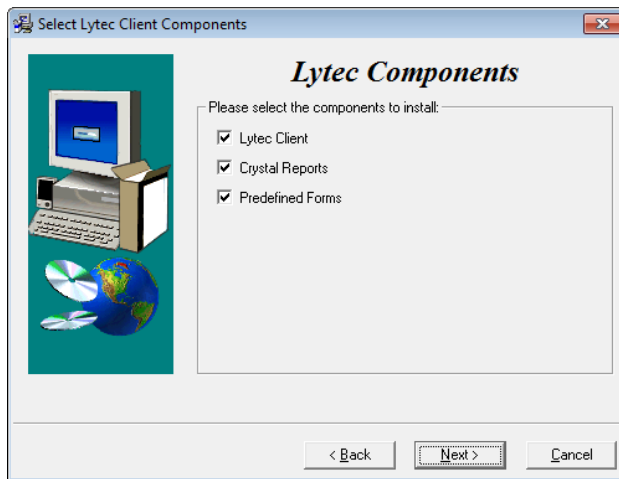

Figure 22. Select Installation Mode screen

7. Click the **Next** button. The Select Components screen appears. Select your components.

CGM LYTEC Client: use this CGM LYTEC software to enter information for your practice. For the client installation, this option is automatically selected.

Crystal Reports: Use this to print and generate reports. You must select this check box for a complete installation of CGM LYTEC.

Predefined Forms: Forms you can use with CGM LYTEC.

Figure 23. Select CGM LYTEC Client Components screen

8. Click the **Next** button. The Target Folder screen appears.
9. Click the **Next** button. The Start Installation screen appears.
10. Click the **Next** button. Let the installation complete.
11. Reboot the computer when the installation is complete.
12. Repeat these steps for each workstation on which you want to install CGM LYTEC.

Account Registration

Enter the information on this screen that you received from your VAR (Value-Added Reseller). Once this is done, you can use Lytec.

Figure 24. Account Registration screen

Important: The Customer Account ID is case-sensitive.

Note: Lytec requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use Lytec for up to 30 days without your Internet connection. After this, you will receive a warning message that you have seven days to connect before you are locked out of Lytec.

Recommendation

It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Lytec SharedData and store it safely offsite. In this way, in case your server fails or you have to set up a new server, you can restore from that backup. Registration

of Lytec 2023 is tied to the server, so if you do not have your Lytec SharedData backed up, you will need to contact your VSE or Support to get your registration reactivated. Perform this one-time backup in addition to the daily practice files backup, which should be performed and stored offsite.

For steps to back up your SharedData, see "Important New Backup Information " on page 8.

Lytec Passwords

In Lytec 2023 and newer, Passwords are case sensitive.

Chapter 5 - CGM LYTEC MD Installation

In this chapter, you will learn how to install CGM LYTEC MD.

Installing on a Domain Controller

eMDs recommends that you simply start the installer and allow it to install SQL automatically. You will be prompted for the Domain Administrator Login and Password at the appropriate time in the procedure.

However, if you choose to install SQL Server 2017 manually, you MUST install/enable (depending on your operating system) .NET 3.5 FIRST. Failure to do so will cause issues with eligibility verification.

Installing Clinical Quality Measures

If you have the 64-bit version of Microsoft Office installed on your computer, a message asks you during installation if you would like to uninstall this version to install Clinical Quality Measures. Clinical Quality Measures is compatible with the 32-bit version of Microsoft Office. eMDs does not recommend uninstalling the current version of Microsoft Office. Instead, install Practice Partner Client and Clinical Quality Measures on a different computer, such as a workstation.

CGM LYTEC MD Installation Checklist

The following steps overview the process of installing CGM LYTECMD.

Step	Process
1	Set up the server computer and permissions for the folders CGM LYTECMD will use. The steps are shown below under "Server Preparation" on page 40.
2	Download and install your license file for CGM LYTEC MD from the Internet. The steps are shown below under "Download the License File for CGM LYTEC MD version" on page 41.
3	Install CGM LYTEC MD on the server. Complete the steps in this book for installing CGM LYTEC MD on the server. Be sure to complete all the steps in the instructions.

4   Install your client workstations. See the "Workstation Installation and Setup" on page 49 section for step-by-step instructions.

5.   Install eMDs Prescribe. Complete the steps in "To upgrade to eMDs Prescribe for CGM LYTEC MD2023:" on page 52.

6.   Configure MPIC to link CGM LYTEC and CGM LYTEC MD. Complete the steps in "MPIC" on page 79 of this guide.

Server Preparation

Prior to Installation

- If SQL Management Studio Express is installed on your server computer, uninstall it prior to installing CGM LYTEC. For steps to do so, see "Uninstalling SQL Management Studio Express 2005" on page 71.

If you are unsure, follow the steps for uninstalling it. If it does not show up on the list of installed programs, then it is not installed.

- Make sure your Windows operating system has the latest service pack installed.
- Disable User Access Control (UAC)
  In order for the installation to go smoothly and for the client to run on the server, UAC must be disabled. Once it is disabled, you will need to reboot the server for the changes to take effect. In addition, disable any anti-virus applications prior to installation. Be sure to re-enable both UAC and anti-virus applications after installation.

Pre-installation Requirements

1. Ensure that your server and workstations meet the system requirements. See "CGM LYTEC Hardware and Software Requirements" on page 1.
2. Know the name of the server to continue with the installation and setup. A server is the computer where your data resides and is running either Windows Server 2012, Windows Server 2016, or Windows Server 2019.
3. Ensure that the logical drive on the application server is a drive letter that is not reserved by any workstation (P: is the recommended drive letter). The drive letter where the application resides on the application server must be available to be mapped to each CGM LYTECMD workstation.
4. Map each workstation to the server computer. A workstation is a computer that you use to run CGM LYTEC but does not store data. It accesses data on the network server.
5. Create a folder on the server, on the logical drive noted above, for Practice Partner and this folder must be empty (typically, this folder is called Ppart).
6. Create a folder called License on the same server. This is where you place your Practice Partner license file. If you do not have a License folder, see "Download the License File for CGM LYTEC MD version" on page 41.
7. Verify that the correct permissions are established for the root drive (typically P). Users must have full access rights. For instructions on setting or verifying these permissions, see "Setting Permissions for the CGM LYTEC MD Root Drive and Folders" on page 73.

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Once you install CGM LYTEC MD on your server, you will need to open or add ports on any third party firewall you might use. Refer to the third party's product documentation for instructions. The ports that need to be opened or added to an exception list are as follows:

For this connection type…	Open these ports.
TCP	1433 and1434
UDP	1434

Download the License File for CGM LYTEC MD version

Download your license file from the Internet.

To Download Your New License File

To download your license files:

1. Go to the eMDs Practice Support website at https://practicesupport.emds.com.

2. Enter your eMDs Practice Support website username and password.

3. Under **Quick Links** on the left side of the page, click the **Downloads & License Files** link.

4. To download the current (11.0 and newer) license file, click the drop-down arrow on the **Download Current Version** button and select **Download License File** from the menu.

   To download the previous (9.5.2) license file, click the drop-down arrow on the **Download Current Version** button and select **Download Previous License** from the menu.

The license file will be downloaded immediately to your machine.Click the Request a license file for installation link.

To Install Your License File for CGM LYTEC MD

1. Create a License folder on the P:\ drive (or whatever drive the ppart folder is on).

To create a License folder:

   a. Click **Start**, point to All Programs, point to Accessories, and then click **Windows Explorer**.
   b. Browse to the P:\ drive (or whatever drive the ppart folder is on).
   c. Create a new folder by right-clicking a blank area in a folder screen or on the desktop, pointing to New, and then clicking Folder.
   d. Rename the default folder to License, and then press ENTER.

2. Save the files attached to the email into the License folder (usually P:\license). One of the files will be named "pplic.txt". If this file doesn't exist (because some Email programs strip this file), please save the other file in the License folder and rename it to "pplic.txt".

Important: Make sure to review the Patch Release Notes documents for any necessary database changes. The Patch Release Notes documents are available on the CGM LYTEC 2023 Documentation page in Salesforce.

CGM LYTEC MD Server Installation

Follow the instructions below to install CGM LYTEC MD on your server computer. You must perform the server installation on a computer with a supported server operating system (Windows Server 2012, Windows Server 2016, or Windows Server 2019) using an administrator account with full privileges.

There are some conditions that will require a reboot during or after installation. Those are:

- Windows Installer 4.5 is not previously installed on the workstation/server where CGM LYTEC is being installed;

- .NET Framework 4 is not previously installed on the workstation/server where CGM LYTEC is being installed

Installation

1. Download the ISO for CGM LYTEC MD from the CGM LYTEC and CGM LYTEC MD Download Links page in Support Center.

2. Extract the ISO and launch autorun.exe. The **I**nstallation screen appears. eMDs recommends that you do NOT attempt to install using any of the programs with the extension *.msi, such as LYTEC.msi. Doing so may result in failure of the installation. Always use autorun.exe.

3. On the CGM LYTEC Installation screen, click **Install CGM LYTEC**. The CGM LYTEC 2023 Installation – Welcome screen appears.
4. Click the **Next** button. The End User License Agreement screen appears. Review the terms of the agreement and click **I accept the agreement**.
5. Click the **Next** button. The Installation Type screen appears. Select the **CGM LYTEC MD** button.
6. Click the **Next** button. The Installation Mode screen appears.

7. Select **Server**.
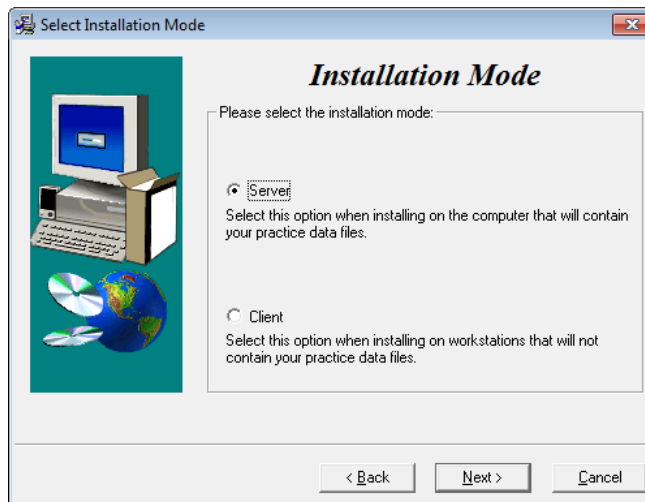
Figure 25. Select Installation Mode screen

8. Click the **Next** button. The Select CGM LYTEC Server Components screen appears. Make your selections (if you are unsure, leave the default settings).
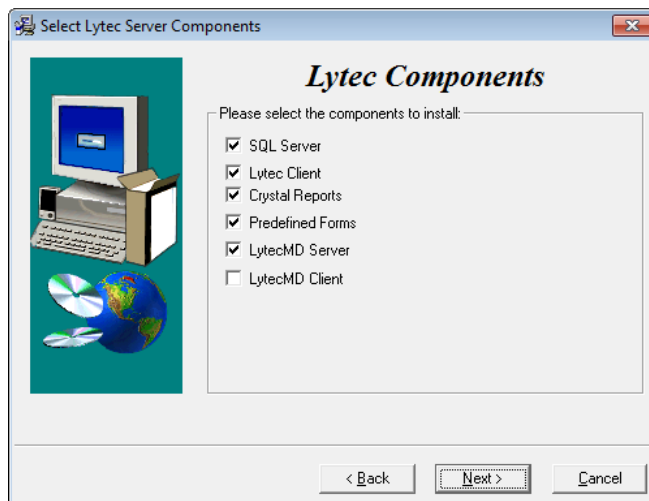

SQL Server: The database engine used by CGM LYTEC

CGM LYTEC Client: Use this CGM LYTEC software to enter information for your practice.

Crystal Reports: Use this application to generate and print reports. You must select this check box for a complete installation of CGM LYTEC.

Predefined Forms: Forms you can use with CGM LYTEC.

CGM LYTECMD Server: This is the software that goes on the server computer to run Practice Partner. It is ONLY installed during the Server installation.

CGM LYTECMD Client: This is the Practice Partner program.

Figure 26. Select CGM LYTEC Server Components screen

9. Click the **Next** button. The Target Folder screen appears.

Note: You will see this screen ONLY if you selected CGM LYTEC Client on the CGM LYTEC Components screen.

10. Click the **Next** button. The Data Folder screen appears. This is the folder where the practice data files will be stored on the server.
11. Click the **Next** button. The SQL Server Setup screen appears.

For security purposes, eMDs recommends that you change the default shown here to something unique, especially if you have more than one CGM LYTEC server on your network.

SQL Server 2017 password requirements:

- The password does not contain all or part of the account name of the user.
- The password is at least eight characters long.
- The password contains characters from three of the following four categories:
  - •Latin uppercase letters (A through Z)
  - •Latin lowercase letters (a through z)
  - •Base 10 digits (0 through 9)
  - •Non-alphanumeric characters such as: exclamation point (!), dollar sign ($), number sign (#), or percent (%).
- Passwords can be up to 128 characters long. You should use passwords that are as long and complex as possible.

Figure 27. SQL Server Setup screen

Note the password requirements above. Failure to create a password that meets these requirements WILL cause the installation to fail.

12. Click the **Next** button.

> **NOTE:** If you are installing on a domain controller, you will see a second screen at this point.

Enter your domain name and the login and password. By default the login will appear. To find the domain name for the computer you are installing CGM LYTEC on,

1. Select **Start**.
2. Right-click **(My) Computer** and select **Properties**.
3. Select the **Computer Name** tab and the domain name will be listed to the right of Domain.The password will be that of the Domain Administrator (usually it is just "administrator"). If you do not know the password, contact the Domain Administrator.
4. Click the **Next** button.

14. Click the **Next** button. The Path to License File screen appears. Enter the path on the server to the file (named pplic.txt).
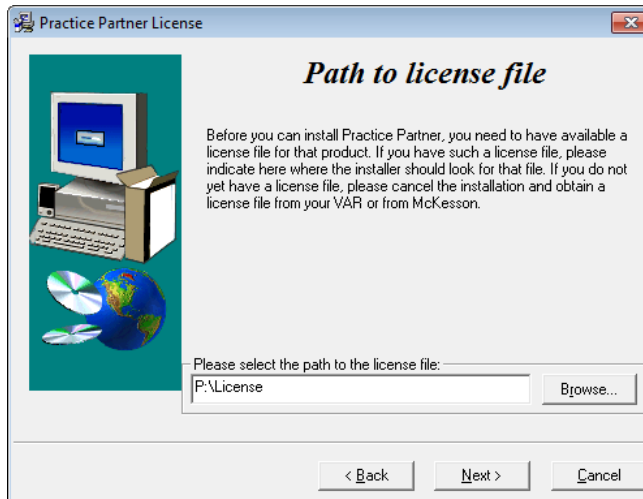
Figure 28. Practice Partner License, Path to License file screen

15. Click the **Next** button. The PP Server Setup screen appears. Specify the location on the computer where you want the Practice Partner Server to be installed. This must be a server drive and be identified by a letter.
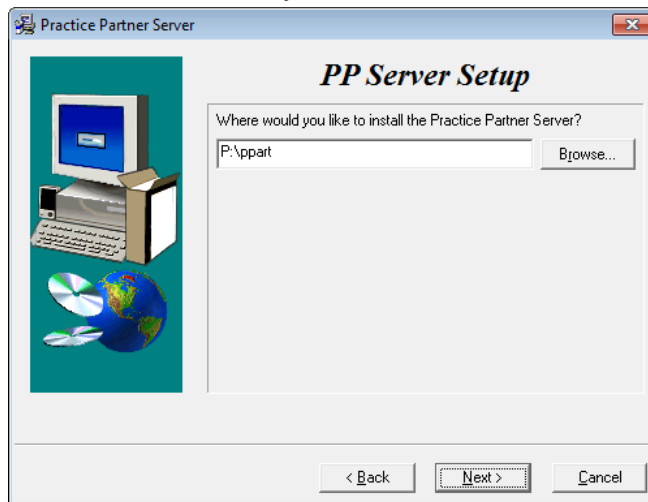

Figure 29. Practice Partner Server Setup screen

16. Click the **Next** button. The PP Initial User screen appears. Write down the name and password of the initial user. You will need this information when you first start and log into Practice Partner.

Your password must be

- Between 8 and 16 characters in length and

- Consist of a combination of letters and at least one number and one non-alphanumeric character.

- Cannot be the same as your user name.

The default value shown to the left is the recommended password.

Figure 30. Practice Partner Initial User screen

17. Click the **Next** button**.** On the PP Database Setup screen, enter the name of the database and a user name and password for the user. This information gives the database a name, user, and password for the Practice Partner database. If you are unsure, leave the defaults for the first two fields and follow the requirements for the password below, make a note of the information.

WARNING: If you are running Windows 2008 Server, you must change the default password on this screen. PM$1ADMIN will not work. eMDs recommends PM$1Admin.

Passwords cannot contain the user's account name or parts of the user's full name that exceed two consecutive characters.

Passwords must be at least six characters in length.

Passwords must contain characters from three of the following four categories:

- English uppercase characters (A through Z).

- English lowercase characters (a through z).

- Base 10 digits (0 through 9).

- Non-alphabetic characters (for example, !, $, #, %).

Figure 31. Practice Partner Database Setup screen

If the current database user (PHTECH) password does not meet the new requirements, you will see a dialog box that will allow you to change the password.

18. Click the **Next** button. The Start Installation screen appears. This screen will tell you what type of installation you are actually performing, so what it says may differ from what appears here.
19. Click the **Next** button. The Installing screen appears and tracks the progress of the install. .
20. Install any Add-Ons to CGM LYTEC MD that you want to install. For more information on Add-Ons, see "Add-Ons" on page 77.
21. After you complete your installation and install any Add-Ons, run the Patch Updater Utility. For steps, see "Upgrading CGM LYTEC MD/Practice Partner to release 11.2" on page 47.

Upgrading CGM LYTEC MD/Practice Partner to release 11.2

The CGM LYTEC MD installer installs CGM LYTEC MD 2023 with Practice Partner 11.0 To upgrade CGM LYTEC MDI/Practice Partner to the latest release (11.2), you must first upgrade to release 11.1 by installing all patches and then upgrading to 11.2. Follow these steps:

Install patches to upgrade to 11.1

1. Install ALL of the 2017 patches in order, starting with the 2/2017 cumulative patch, making sure to OMIT the 4/5/2017 client/server patches until there are no more patches left.

   NOTE: All of the other pre-2017 patches will be on the list. Do not be alarmed; this is normal.

2. When there are only the 4/5/2017 patches left, install both client/server patches, leaving all the pre-2017 patches uninstalled.

3. Once the Update Manager reboots after installing patches, all of the post-4/5/2017 patches will be available, as you now are pointing to another bucket. You then can install all the remaining patches through current.

   NOTE: eMDs recommends that you install the server patches first in order one-by-one post-4/5/2017 patch so that you can verify that the database changes are made without error. The error will be noticeable in the command prompt window but also is recorded in the ppart\ligs\MaintenanceEngine.log text file. If you have an error, contact Technical Support.

4. Once the server has updated, you can accept all other patches together by selecting all.

If you plan to use Appointment Scheduler and/or Medical Billing...

1. Obtain the new patching utility. This utility, called **EnableVersion11_2.exe**, has been created for Appointment Scheduler and/or Medical Billing sites to switch to the new 11.2 patching system.

2. Download the utility from the Support website and save it to your ppart folder.

3. Run the utility from the command prompt to make the switch to the new 11.2 patching system. The utility will indicate in the command prompt window if it completed successfully or failed.

If you plan to use Patient Records...

See the instructions for installing eMDs Prescribe: "To upgrade to eMDs Prescribe for CGM LYTEC MD2023:" on page 52.

22. When the installation is complete, start CGM LYTEC and specify the default SQL server credentials. For step by step instructions, see "Specifying the Default SQL Server Credentials" on page 69.
23. Follow the steps at "Upgrading to eMDs Prescribe" on page 51 to install eMDs Prescribe.
24. Create your new practice. See "New Practice" on page 69.

Account Registration

Enter the information on this screen that you received from your VAR (Value-Added Reseller). Once this is done, you can use Lytec.

Figure 32. Account Registration screen

Important: The Customer Account ID is case-sensitive.

Note: Lytec requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use Lytec for up to 30 days without your Internet connection. After this, you will receive a warning message that you have seven days to connect before you are locked out of Lytec.

Recommendation

It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Lytec SharedData and store it safely offsite. In this way, in case your server fails or you have to set up a new server, you can restore from that backup. Registration of Lytec 2023 is tied to the server, so if you do not have your Lytec SharedData backed up, you will need to contact your VSE or Support to get your registration reactivated. Perform this one-time backup in addition to the daily practice files backup, which should be performed and stored offsite.

For steps to back up your SharedData, see .

Account Registration Process Troubleshooting

If you have verified that you do not have a prior installation of Lytec 2023 on your server and have ensured that the IsRegistered check box is removed, but still receive the following error that the SalesForce account is already registered:

Figure 33. Error message

Then, check for a firewall or router that may be blocking some of the Platform Services APIs. The following must all be allowed:

identity.emdscloud.com	eligibilitybenefits.emdscloud.com
licensing.emdscloud.com	ppsmobile.emds.com

terminology.emdscloud.com	api.emdscloud.com

In addition, the two below are required if you are using CGM CONNECTION:

https://cnx.cgmus.com/

https://cnx-mh.cgmus.com/

Lytec Passwords
In Lytec 2023 and newer, Passwords are case sensitive.

Workstation Installation and Setup

1. Disable UAC (User Account Control) prior to installing on each workstation. Once it is disabled, you will need to reboot the computer for the changes to take effect. In addition, disable any anti-virus applications prior to installation. Be sure to re-enable both UAC and anti-virus applications after installation.

2. Launch autorun.exe. The CGM LYTEC Installation screen appears.

   eMDs recommends that you do NOT attempt to install using any of the programs with the extension *.msi, such as LYTEC.msi. Doing so may result in failure of the installation. Always use autorun.exe.

3. On the CGM LYTEC Installation screen, click **Install CGM LYTEC**. The CGM LYTEC 2023 Installation – Welcome screen appears.
4. Click the **Next** button. The End User License Agreement screen appears. Review the terms of the agreement and click **I accept the agreement**.
5. Click the **Next** button. The Installation Type screen appears.
6. Select the **CGM LYTEC MD** button and click the **Next** button. The Installation Mode screen appears.
7. Select the **Client** button.
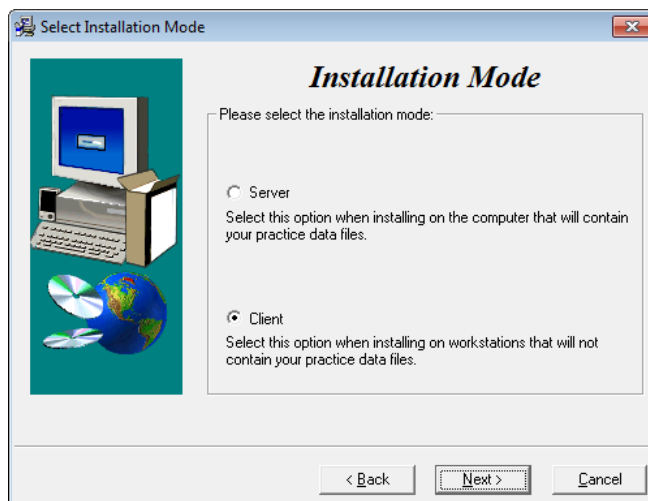
Figure 34. Select Installation Mode screen

8. Click the **Next** button. The Select CGM LYTEC Client Components screen appears. Select your components.
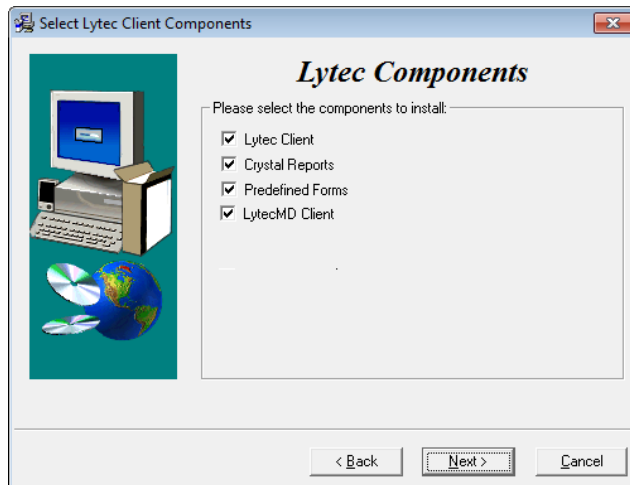
CGM LYTEC Client: Use this CGM LYTEC software to enter information for your practice.

Crystal Reports: Use this application to generate and print reports. You must select this check box for a complete installation of CGM LYTEC.

Predefined Forms: Forms you can use with CGM LYTEC.

CGM LYTECMD Client: This is the CGM LYTECMD client software.

Figure 35. Select CGM LYTEC Client Components screen

9. Click the **Next** button. The Target Folder screen appears.
10. Click the **Next** button. The PP Client Setup screen appears.
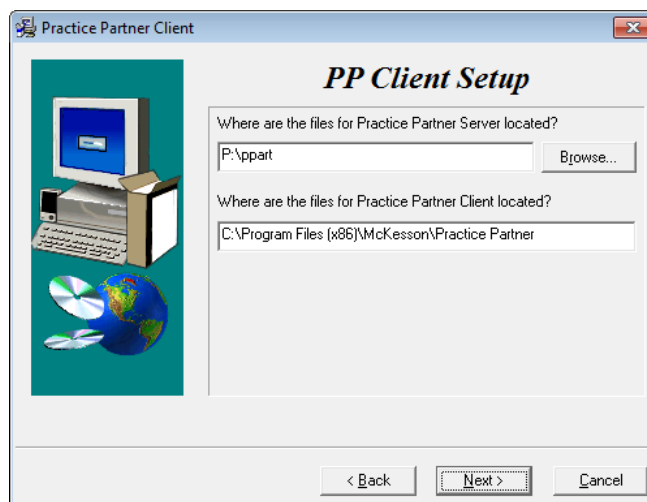
Figure 36. Practice Partner Client screen

Use the Browse button to locate the Practice Partner server files (set up during the Server installation procedure). These files will be on the server computer (typically in P:\ppart). In addition, type in the path where the Practice Partner Client is located. These files will be stored on the client computer.

11. Click the **Next** button. The Start Installation screen appears.
12. Click the **Next** button. Let the installation complete.
13. Install any Add-Ons to CGM LYTEC MD that you want to install. For more information on Add-Ons, see "Add-Ons" on page 77.
14. After you complete the upgrade of CGM LYTEC MD and any Add-Ons, start CGM LYTEC MD from the Start menu. It will automatically install any patches for the client workstation.
15. Repeat these steps for each workstation on which you want to use CGM LYTEC MD.

16. Once you have completed installation on all your workstations, configure MPIC to transfer data between CGM LYTEC and CGM LYTEC MD. For more information, see "MPIC" on page 79.

Account Registration

Enter the information on this screen that you received from your VAR (Value-Added Reseller). Once this is done, you can use Lytec.

Figure 37. Account Registration screen

Important: The Customer Account ID is case-sensitive.

Note: Lytec requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use Lytec for up to 30 days without your Internet connection. After this, you will receive a warning message that you have seven days to connect before you are locked out of Lytec.

Recommendation

It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Lytec SharedData and store it safely offsite. In this way, in case your server fails or you have to set up a new server, you can restore from that backup. Registration of Lytec 2023 is tied to the server, so if you do not have your Lytec SharedData backed up, you will need to contact your VSE or Support to get your registration reactivated. Perform this one-time backup in addition to the daily practice files backup, which should be performed and stored offsite.

For steps to back up your SharedData, see "Important New Backup Information " on page 8.

Lytec Passwords

In Lytec 2023 and newer, Passwords are case sensitive.

Upgrading to eMDs Prescribe

This section lists the steps you must complete to upgrade to eMDs Prescribe for CGM LYTEC2023MD.

eMDs Prescribe migration process

Prerequisite

eMDs recommends that a few days before you plan to perform the migration to eMDs Prescribe, that you run the **CheckProviderSPIAndNPI.exe** utility located in the ppart folder. If the utility is missing from the ppart folder, make sure you have installed all of the latest patches, and if it still is not present in the folder, contact Technical Support.

The **CheckProviderSPIandNPI.exe** utility performs a check to verify that an SPI associated with a provider is associated with only one practice, that all providers who have an SPI also have an NPI, and that practices do not have duplicate addresses. The utility generates a report called the Migration Readiness Assessment. If any of the checks fails, you will see a list of warning messages indicating the provider(s) or practice(s) you need to fix before you start the migration.

If the report finds no issues in any of the checks, it will report the prescriber and demographics that will be migrated to eMDs Prescribe. Please check this data for accuracy in order to avoid issues when transferring data to the new system.
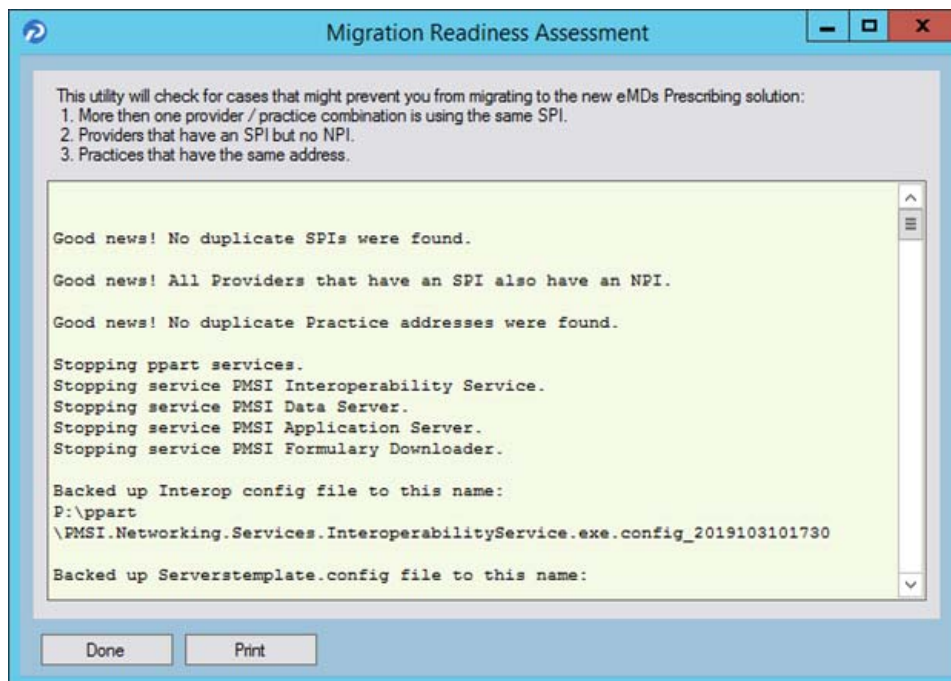
Figure 38. Migration Readiness Assessment

NOTE: If a provider requires a new SPI, you can use the Prescriber Management screen to register for a new SPI after you migrate to eMDs Prescribe. For more information, see the *Electronic Prescribing Registration Process and Setup Guide* and the **Prescriber Management screen** help topic.

To upgrade to eMDs Prescribe for CGM LYTEC MD2023:

Complete the following steps to upgrade to eMDs Prescribe for CGM LYTEC MD2023.

1. Log onto the Practice Support website to download the **MigrateToEmdsRx.exe** utility to your **PPart** folder.

2. Complete each item on the following checklist:

Check off when complete	Task
_____	Approve or deny all refill requests for all providers.
_____	Back up your CGM LYTEC MD database and **PPart** folders.
_____	The process to migrate could take a significant amount of time, depending on the size of your database. Both internal and beta testing have shown that upgrade completion times can exceed 10 hours, during which system access should not be allowed. eMDs recommends that you plan accordingly and allow for ample time for the process to complete.
_____	Understand that once the eMDs Prescribe patches are installed, you CANNOT revert to the previous version of prescription functionality.
_____	Ensure that you are up to date on all patches.
_____	Ensure that the following URLs are added to your trusted sites: **https://microservice.emds.com/** **https://erx.emdscloud.com**

3. Double-click **MigrateToEmdsRx.exe**. The Migrate to eMDs Prescribe screen appears.
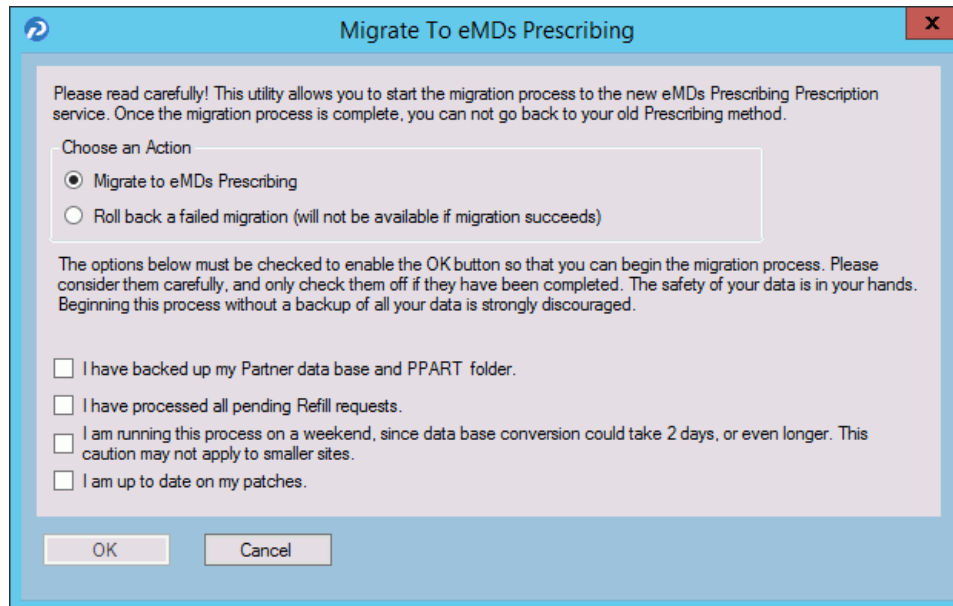
Figure 39. Migrate to eMDs Prescribe screen

4. Select the **Migrate to Emds Prescribing** option, select all check boxes at the bottom of the screen, and click the **OK** button.

If the utility...	Then...
completes successfully	the Launch the Software Update screen appears.
fails to complete	return to the Migrate to Emds Rx screen, select the **Roll back a failed migration** option, and click the **OK** button so that you can continue to use electronic prescribing.
	When you are ready to run the migration again, start at step 2.
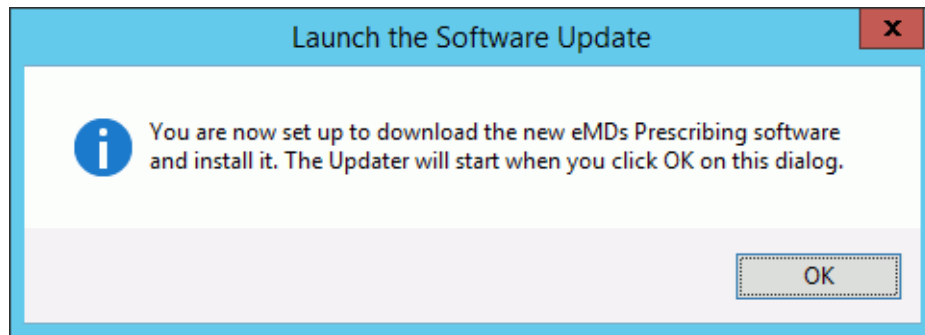
Figure 40. Launch the Software Update screen

5. Click the **OK** button. The Product Update Manager screen appears.
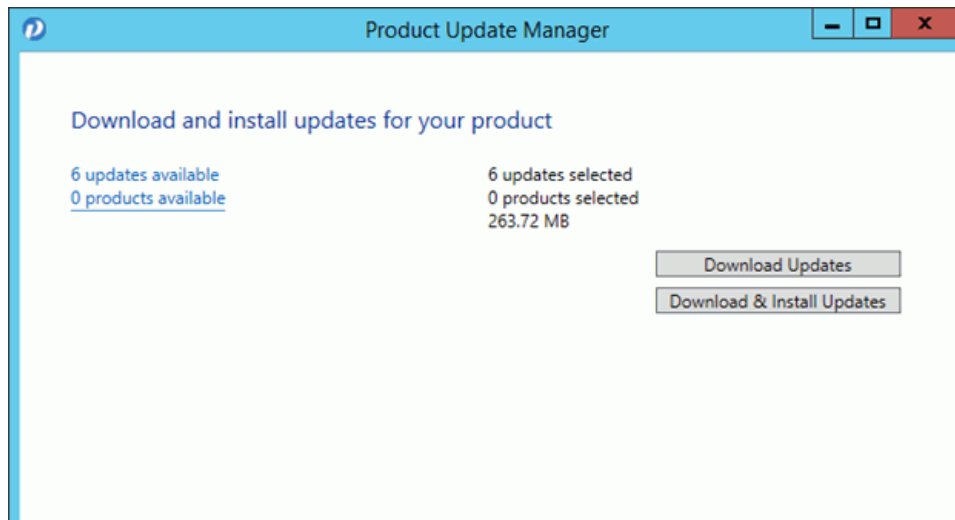
Figure 41. Product Update Manager screen

6. Select all patches and download and install them.

Open a command prompt and change the path to your **ppart** folder, which usually is in the **P:** drive. Execute the command **fixppsq.exe ALL**, which is to fix the unique sequence values. If you do not run this step, you may encounter an **Unable to add prescription** error when prescribing a medication.
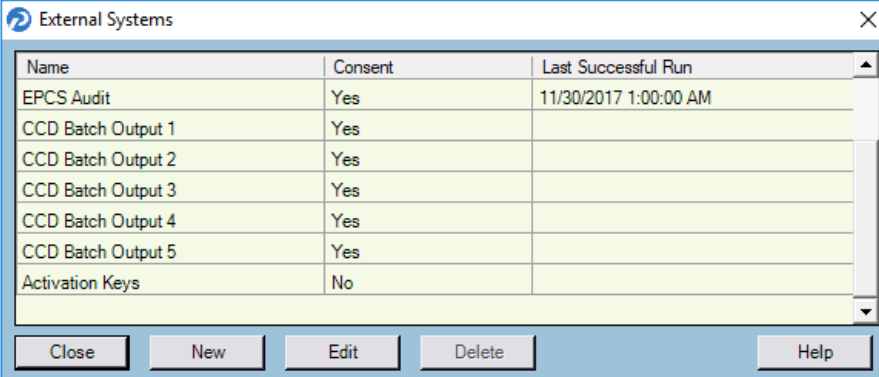
NOTE: If the patch process fails, contact Technical Support for help resolving the patch failure issue. If the Server Patch completes but there is a failure in the database conversion that cannot be resolved by Technical Support, then a complete system restore will be necessary. After the complete system restore, run the **MigrateToEmdsRx.exe** utility rollback option so that you can ePrescribe on the old system. You can try the migration again at a later date.

Verify that the migration process started all PMSI services. If it did not, attempt to restart the PMSI services yourself. If you are unable to get all PMSI services started, contact Technical Support.

7. Access Patient Records to activate with eMDs Prescribe.

    a. Select Maintenance > Set Up > **External Systems**. The External Systems screen appears.

Name	Consent	Last Successful Run
EPCS Audit	Yes	11/30/2017 1:00:00 AM
CCD Batch Output 1	Yes	
CCD Batch Output 2	Yes	
CCD Batch Output 3	Yes	
CCD Batch Output 4	Yes	
CCD Batch Output 5	Yes	
Activation Keys	No	

Figure 42. External Systems screen

b. Select the **Activation Keys** row and click the **Edit** button. The Activation Configuration screen appears.

Figure 43. Activation Configuration screen

c. Leave all fields in the **Schedule** area set to their default values and click the **Activate** button.

d. When activation is complete, information will display in the **Activation Log** area. If activation did not complete, contact Support.

8. Exit Patient Records.

9. Run the **RegisterWithEmdsRX.exe** utility from the **PPart** folder. This utility will download your prescriber demographic data. If there are any mismatches between the data and what is stored in eMDs Prescribe, you must resolve the issues. (If you currently are not using e-Prescribing or are a new customer, you can skip this step since there will be no data to reconcile.)

10. Once the data is reconciled, click the **Register** button to register the customer and sync the information in the CGM LYTEC MD system with the data.

11. When the utility completes successfully, you are ready to start using eMDs Prescribe.

Transferring data to the eMDs system

Complete the following steps to transfer your existing data to the new system.

1. In the ppart folder, double-click **RegisterWithEmdsRx.exe**. The Register Customer screen appears.
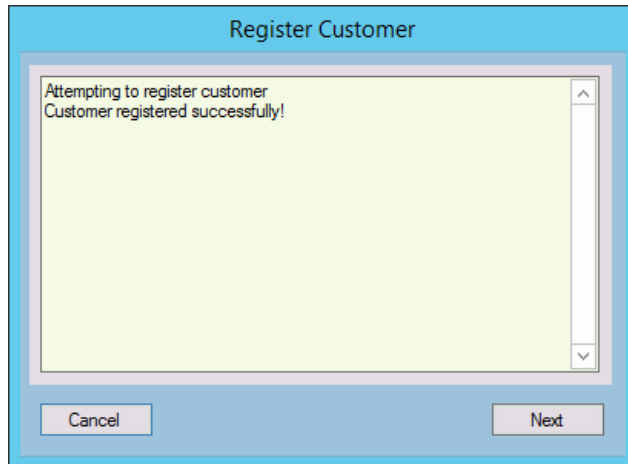
Figure 44. Register Customer screen

2. Click the **Next** button. The Register With eMDs Prescribe screen appears.
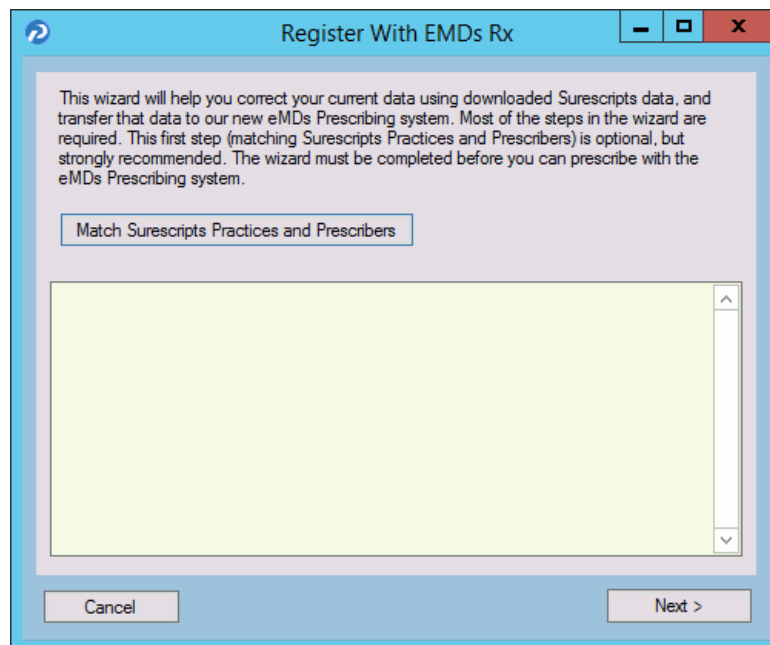
Figure 45. Register With eMDs Rx screen

eMDs strongly recommends that you match Surescripts practices and providers so that you can reconcile any differences you have between your data and the data contained in Surescripts. If you choose not to do so, skip to step 14.

To match Surescripts practices and providers:

3. Click the **Match Surescripts Practices and Prescribers** button. The Surescripts Practices screen appears. This screen displays all CGM LYTEC MD practices that have data that differs from the data recorded in Surescripts. If no practices are found that require reconciliation, the Surescripts Practices screen will not appear and you can skip to step 8.
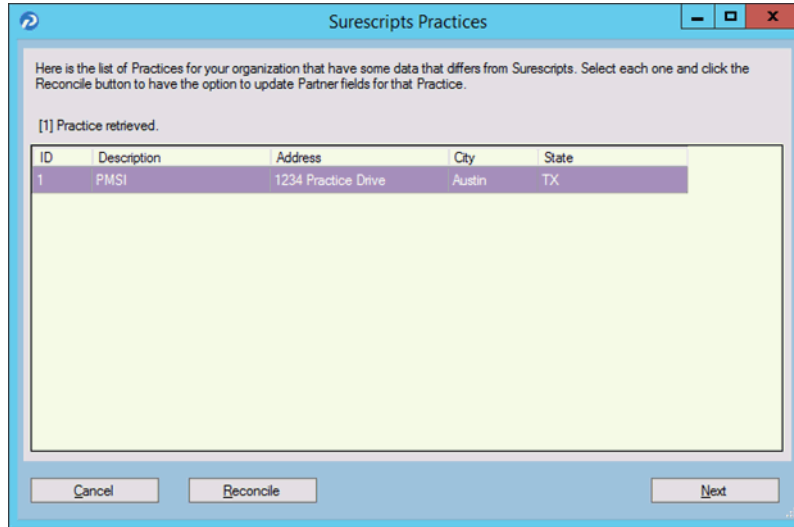
Figure 46. Surescripts Practices screen

4. Highlight a practice and click the **Reconcile** button. The Practice Reconciliation screen appears.
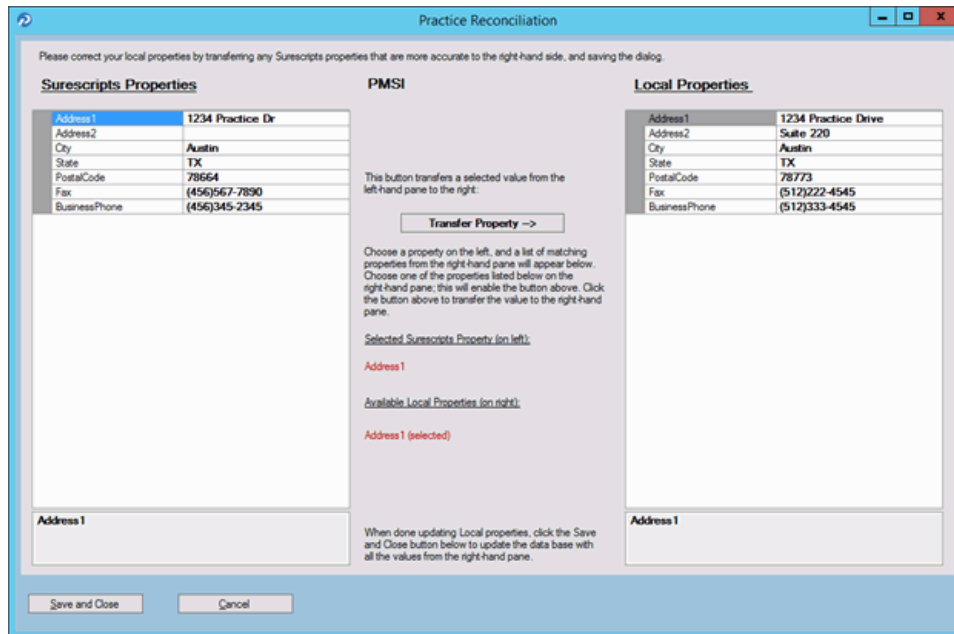
Figure 47. Practice Reconciliation screen

The following table describes the grids/fields on this screen.

Grid/field	Description
Surescripts Properties	This grid displays the demographic data associated with the practice in Surescripts.
Local Properties	This grid displays the demographic data of the practice in CGM LYTEC MD.
Selected Surescripts Property	This field displays the value that currently is selected in the **Surescripts Properties** grid.
Available Local Properties	This field displays each **Local Properties** value that is available to transfer the Surescripts data to replace in CGM LYTEC MD.

5. Select a value in the **Surescripts Properties** grid and an available field in the **Local Properties** grid and click the **Transfer Property** button to copy the Surescripts value to the Local Properties.

NOTE: If the selected **Local Properties** value is not one of the 'available local properties' for the selected Surescripts property, nothing will happen when you click the **Transfer Property** button.

You also can update the **Local Properties** fields manually by clicking in the field and typing a value.

6. When you are finished reconciling the practice data, click the **Save and Close** button to save the updates and return to the Surescripts Practices screen.

7. Repeat steps 4-6 for each practice that needs reconciling.

8. When you are finished reconciling all practice data, click the **Save and Close** button on the Surescripts Practices screen. The Surescripts Prescribers screen appears. This screen displays all CGM LYTEC MD providers whose data differs from the data recorded in Surescripts. If no providers are found who require reconciliation, then this screen will not

display and you can skip to step 14.
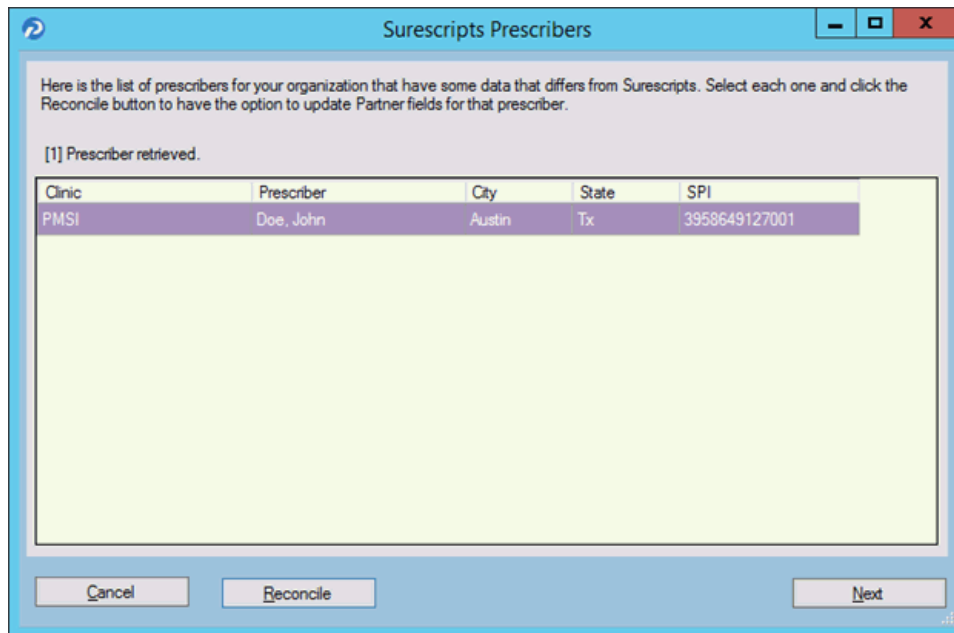
Figure 48. Surescripts Prescribers screen

9. Highlight a prescriber and click the **Reconcile** button. The Prescriber Reconciliation screen appears.
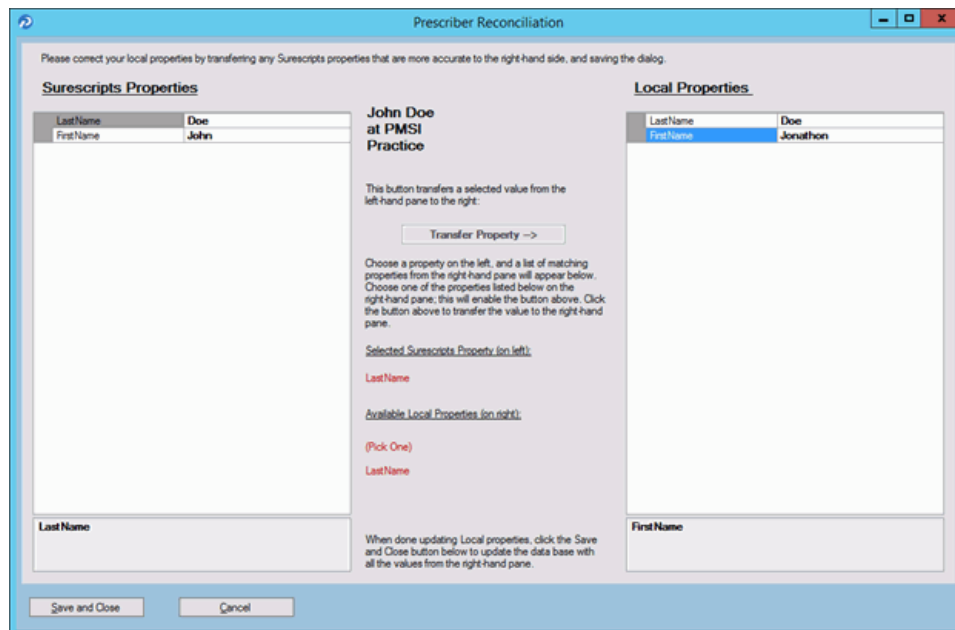
Figure 49. Prescriber Reconciliation screen

The following table describes the grids/fields on this screen.

Grid/field	Description
Surescripts Properties	This grid displays the demographic data associated with the prescriber in Surescripts.
Local Properties	This grid displays the demographic data of the provider in CGM LYTEC MD.
Selected Surescripts Property	This field displays the value that currently is selected in the **Surescripts Properties** grid.
Available Local Properties	This field displays each **Local Properties** field that is available to transfer the Surescripts data to replace in CGM LYTEC MD.

10. Highlight a value in the **Surescripts Properties** grid and an available field in the **Local Properties** grid and click the **Transfer Property** button to copy the Surecripts value to the Local Properties.

NOTE: If the selected **Local Properties** value is not one of the 'available local properties' for the selected Surescripts Property, nothing will happen when you click the **Transfer Property** button.

You also can update the **Local Properties** fields manually by clicking in the field and typing a value.

11. When you are finished reconciling the prescriber data, click the **Save and Close** button to save the updates and return to the Surescripts Prescribers screen.

12. Repeat steps 9-11 for each prescriber who needs reconciling.

13. When you are finished reconciling all prescriber data, click the **Save and Close** button on the Surescript Prescribers screen. The Register With eMDs Prescribe screen appears again.
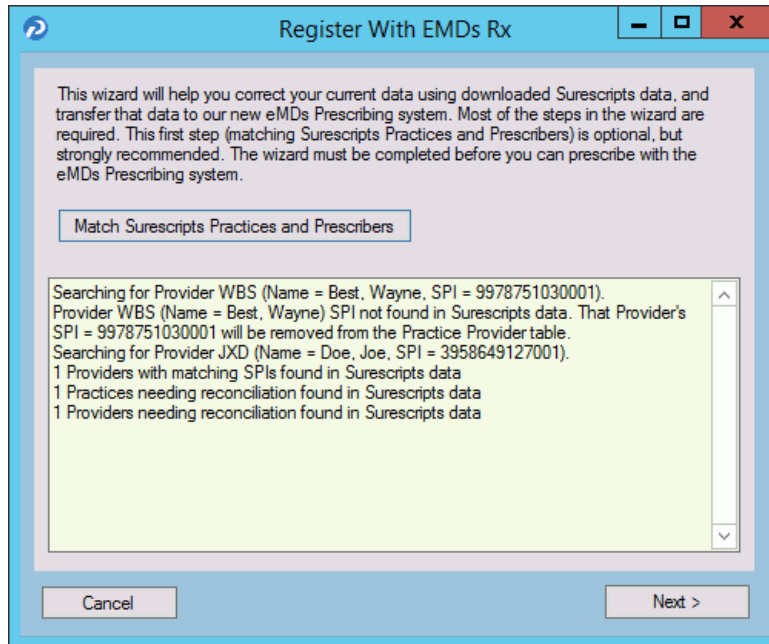
Figure 50. Register With eMDs Rx screen

NOTE: Any issues with the data reconciliation must be resolved before continuing with the next step.

14. Click the **Next** button. Your customer and practices will be registered with eMDs Prescribe. The Register Organizations for eMDs Prescribe screen appears with the results of the registration process.
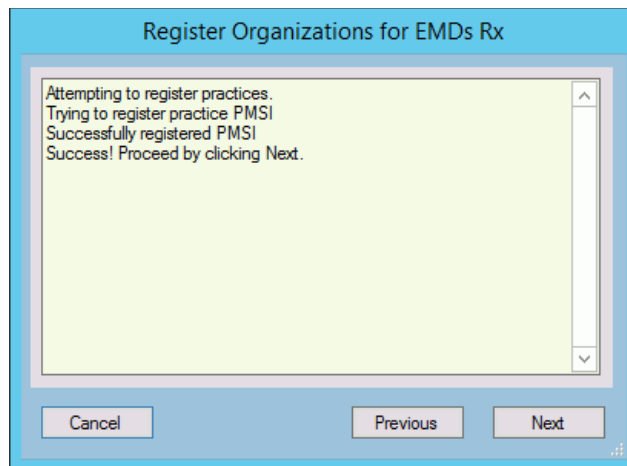
Figure 51. Register Organizations for eMDs Rx screen

15. Click the **Next** button. The Prescriber Migration screen appears and displays the total number of providers who you have affiliated with practices at your customer and the number of providers who need to be migrated.
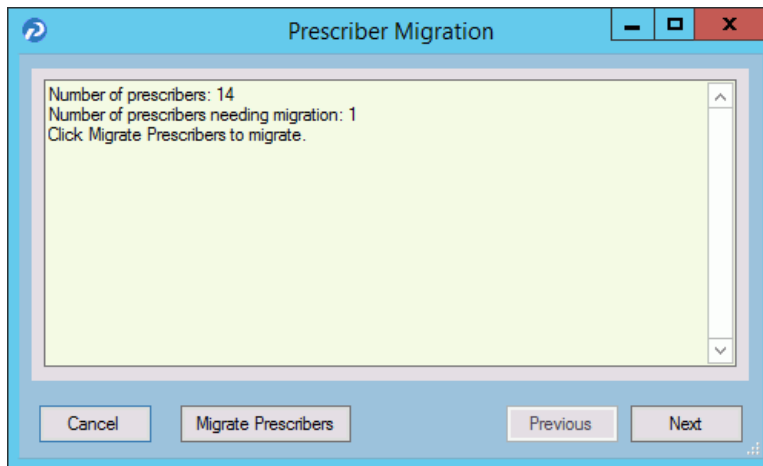
Figure 52. Prescriber Migration screen

16. Click the Migrate Prescribers button to migrate the prescribers. The results of the migration display on the Prescriber Migration screen.
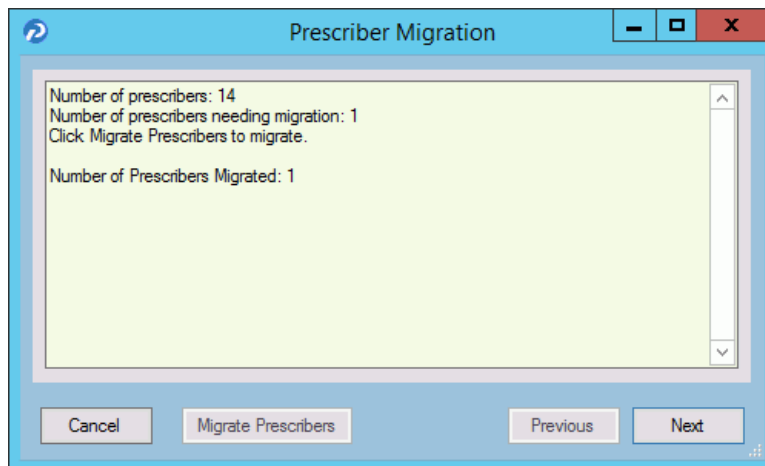
Figure 53. Prescriber Migration screen

If you encounter an error that states 'Change/Refill service already assigned to spi: ####', note the SPI number listed in the error message. This error is caused by a conflict of address information in Surescripts for the prescriber. Close and restart the utility and click the **Next** button to return to the Prescriber Migration screen and finish migrating your prescribers. This prescriber will be registered and will be allowed to prescribe; however, the prescriber still will

have conflicting address information in Surescripts. Contact Technical Services the day after the migration completes with the SPI number to get the conflicting address data corrected.
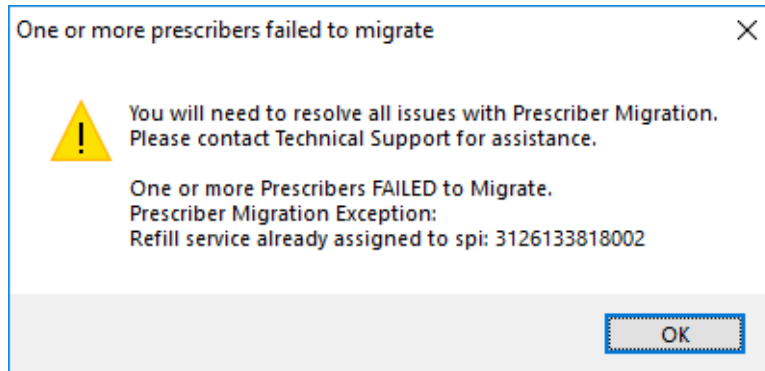
Figure 54. 'One or more prescribers failed to migrate' error message - with SPI number

If you encounter any other error, review the cause of the error and then close the utility. Log into CGM LYTEC MD and resolve the issue. Once the issue is resolved, you can restart the utility and click the **Next** button to return to the Prescriber Migration screen, where you can finish migrating your prescribers. Contact Technical Services if you need assistance.
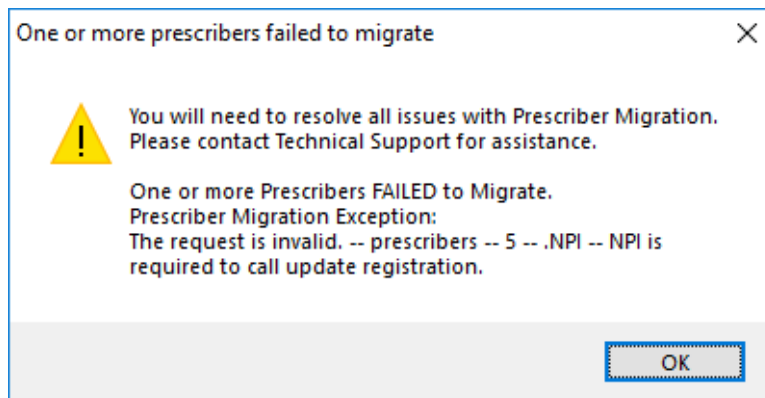
Figure 55. 'One or more prescribers failed to migrate' error message

17. Click the **Next** button. The Pharmacy Migration screen appears and displays the number of custom pharmacies associated with patients in CGM LYTEC MD.
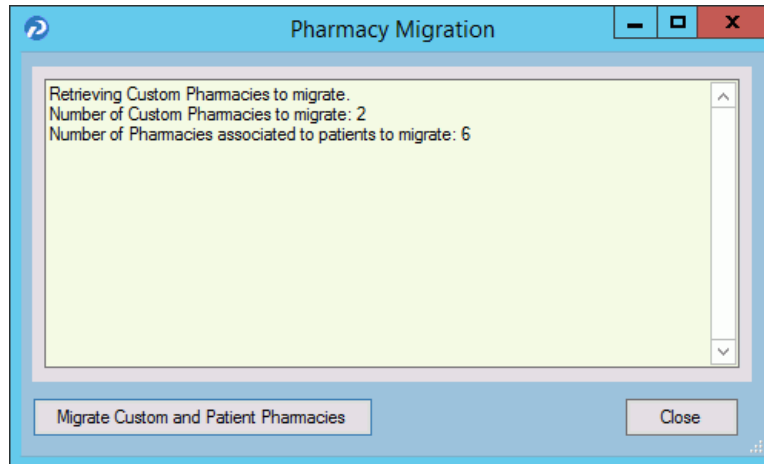
Figure 56. Pharmacy Migration screen

18. Click the **Migrate Pharmacies** button to migrate the custom pharmacies. The results of the migration display on the Pharmacy Migration screen.

NOTE: This migration process can take several hours to complete, but your normal work activities can continue during this time.
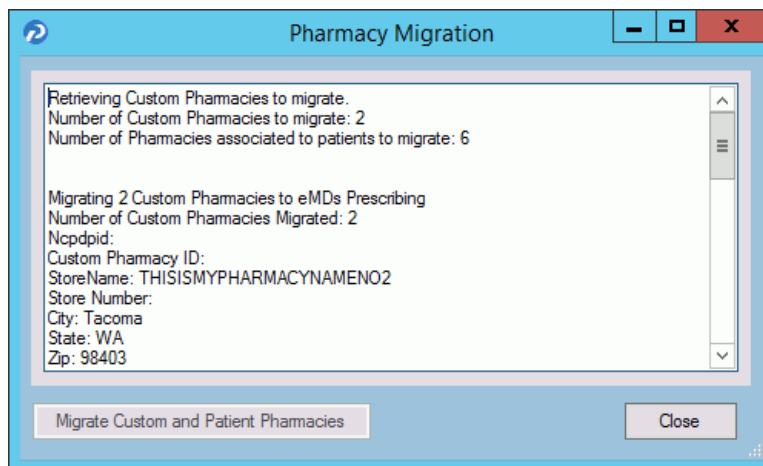
Figure 57. Pharmacy Migration screen

19. Click the **Close** button. The Migration Activity Report appears.
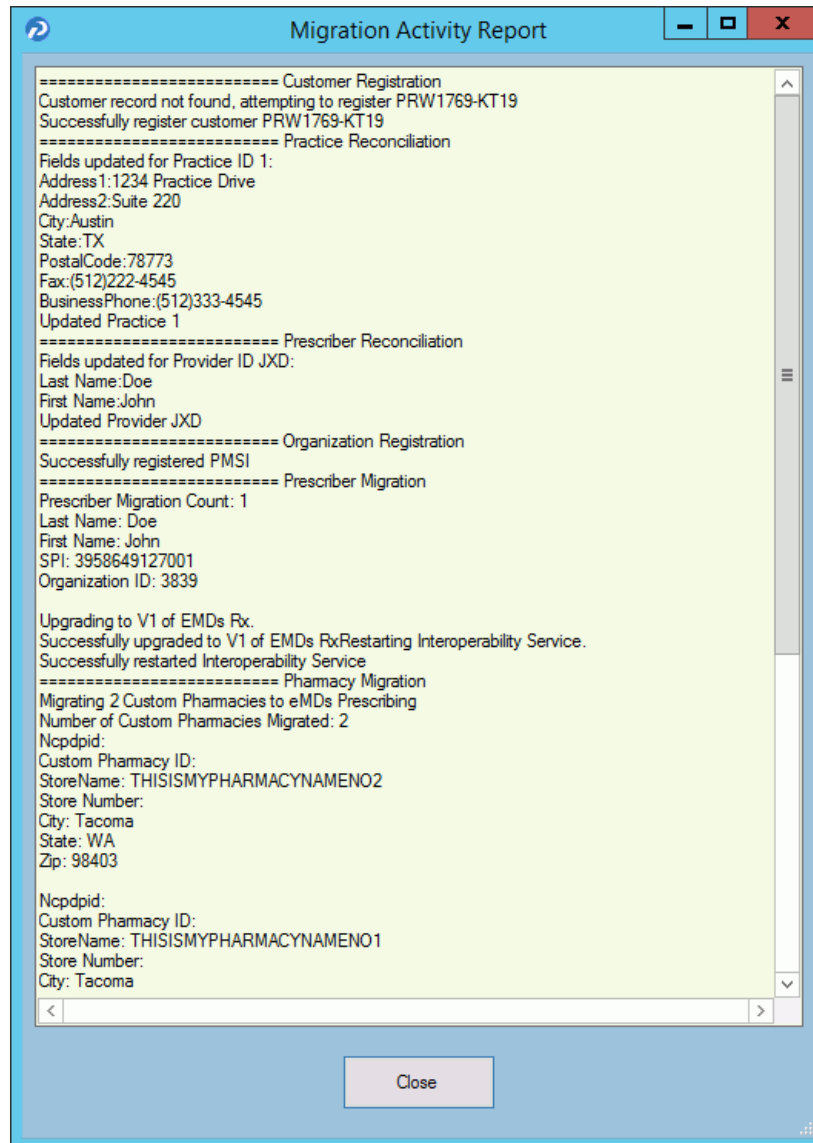
Figure 58. Migration Activity Report

20. Click the **Close** button to close the wizard.

NOTE: If you encounter any issues during the registration process, review the **RegisterWithEmdsRx.log** file in the ppart folder.

Set the PrescriberManagementAdministrators= setting in the ppart.ini file

The **PrescriberManagementAdministrators=** setting controls which users receive the EPCS Audit report. The default setting is **PrescriberManagementAdministrators=UsePrescriberManagement**, which will send the EPCS Audit report to all users who have the Prescriber Management access level enabled.

To send the report to only certain users, specify those users' operator names in the setting in the case in which the operator names exist in the system (this setting is case sensitive). For example, **PrescriberManagementAdministrators=ACOBB, JSMITH, BBALL**. In this case, the EPCS Audit report will be sent only to users ACOBB, JSMITH, and BBALL.

The list of checks that this setting makes is as follows. Steps 3 and 4 are reached only if no operators have the Prescriber Management access level set.

1. List of operators in Override setting

2. Operators with Prescriber Management access level

3. Admin operator in Surescripts_Rcv.ini

4. OPID=1

Remove the PMSI.ePrescriptionConfiguration.exe utility

With release 11.2, the PMSI.ePrescriptionConfiguration.exe utility no longer is used. eMDs recommends removing this utility to avoid potential confusion.

Chapter 6 - Post Installation Setup

This chapter indicates how to specify default SQL server credentials and how to create a new practice in CGM LYTEC.

Important: Make sure to review the Patch Release Notes documents for any necessary database changes. The Patch Release Notes documents are available on Salesforce.

Specifying the Default SQL Server Credentials

After you have installed CGM LYTEC, you will need to specify the default SQL credentials. CGM LYTEC does not install or control the SQL instance. Instead, it uses an existing one by being given the credentials to the instance.

1. Start CGM LYTEC. The Specify Default SQL Credentials screen appears.
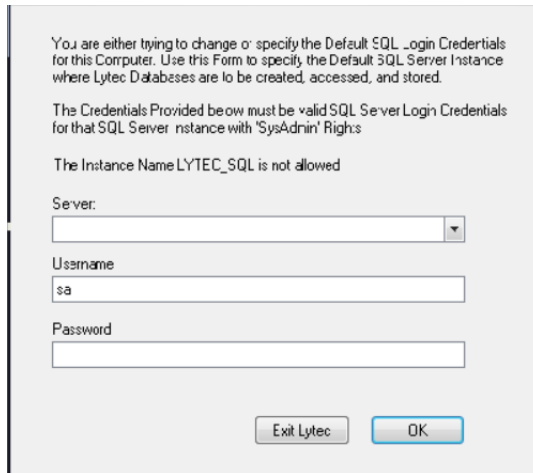
Figure 59. Specify Default SQL Credentials screen

2. Select the server and instance name that was specified in the SQL Server Setup step during installation. The default Username is sa.
3. Click the **OK** button.

New Practice

1. On the CGM LYTEC button, select **New Practice**. The New Practice screen appears.
2. Enter the following information in the screen:

Field	Description
Practice Name	Enter a name for the practice.

Field	**Description**
SYSTEM Password	Enter a password for the SYSTEM user. This password must be at least seven characters long and contain both alpha and numeric characters (for instance, SYSTEM1).
Confirm Password	Reenter the SYSTEM password.

3. Click the **OK** button to create the practice. The Log In screen appears.
4. Enter **SYSTEM** as the user code and the SYSTEM Password created in Step 2.
5. Click the **OK** button to open the new practice.

Appendix A - Uninstalling SQL Management Studio Express 2005

If you have version 2005 installed, you will need to uninstall it prior to starting the installation of CGM LYTEC.

To uninstall this program:

1. **Start**, point to Control Panel, and double-click **Add or Remove Programs**.
2. In the list of installed programs, click **Microsoft SQL Server Management Studio Express**, and then click **Remove**.
3. Click the **Yes** button on the warning screen. The program is uninstalled.

Appendix B - Setting Permissions for the CGM LYTEC MD Root Drive and Folders

Workstations and users must have full access to the root drive and folders where the Practice Partner files are stored.

1. On the server, double-click the **My Computer** icon or select **Start** and then **Computer**.
2. Right-click on the drive set up for CGM LYTEC MD Server/Practice Partner (typically P:) and select **Properties**.
3. Select the Sharing tab and click **Advanced Sharing**.
4. Select the **Share this folder** check box and specify the Share name (typically P).
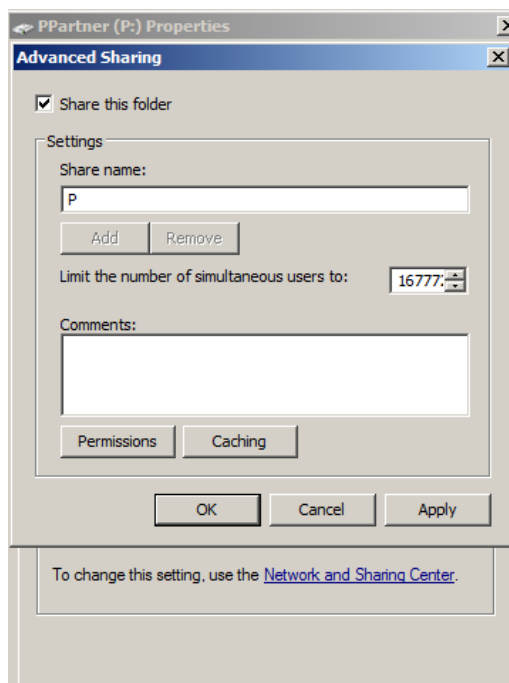
Figure 60. Advanced Sharing screen on Sharing tab

5. Click the **Permissions** button. On the Permissions screen, click **Add** and type USERS in the Enter the object names to select box.
6. Click **OK**.
7. Repeat this process and create a SYSTEM user and a DOMAIN USER (if you are on a domain; If there is no domain, you might get a message telling you so).
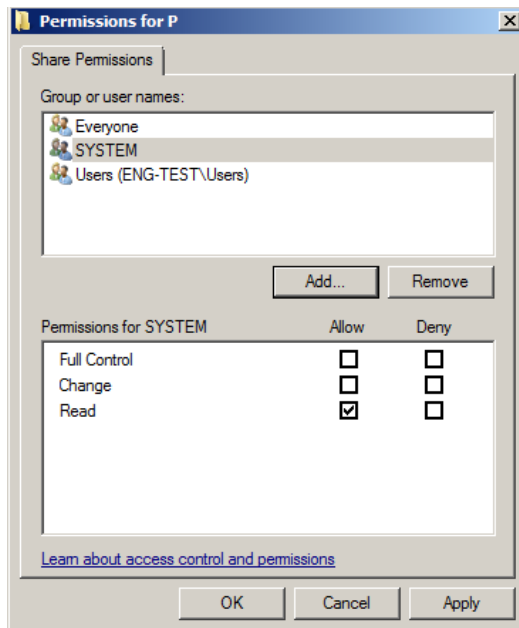
Figure 61. Permissions tab

8. On the Permissions screen, select each user from the Group or user names box and then click **Allow** for **Full Control** in the Permissions for… box.
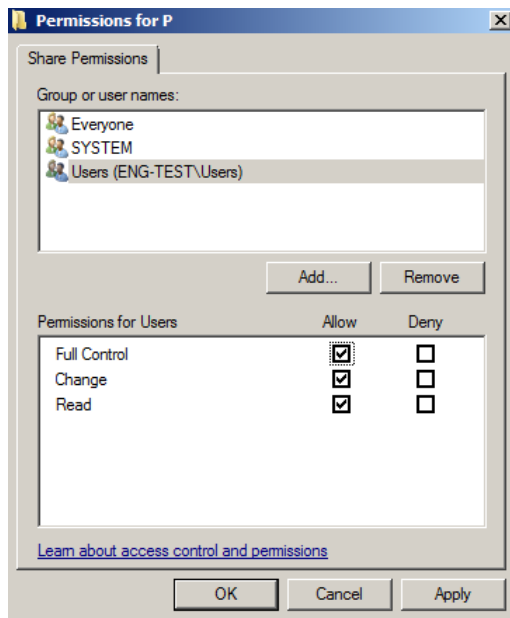
Figure 62. Permissions tab Full Allow

9. Click **OK** twice to return to the Properties screen.
10. Click the **Security** tab.
11. Highlight Everyone and click **Edit**.

12. On the Permissions screen, select the **Allow** check box for Full Control.
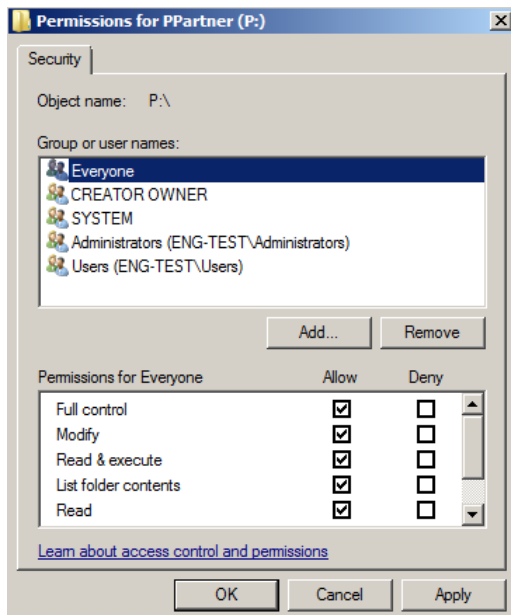
Figure 63. Permissions tab Allow for Full Control

13. Highlight SYSTEM, Users, and Domain (if necessary) and select the **Allow** check box for Full control. When you are done, click **OK**.
14. Click **Close** on the Properties screen and close My Computer.

Appendix C - Add-Ons

Your CGM LYTEC MD download comes with six add-on applications that can enhance the capabilities of CGM LYTEC MD. These add-Ons are

Add-On	Description
ePrescribing	Use ePrescribing to send and receive prescription-related messages to and from pharmacies, to view real-time pharmacy benefits and eligibility data on your patients, to see up-to-date formulary and coverage information for specific drugs during the prescribing process, and to view information about prescriptions your patients have had filled, even from other providers
Templates	Use templates to save time by eliminating the need to type up routine tasks.
PPConnect	Use PPConnect to add and update information from a third-party system into Practice Partner Patient Records and Appointment Scheduler, as well as Practice Partner to a third-party system.
Remote Client Connect	Use Remote Client Connect to run interfaces on client workstations.
LabCorp	Use LabCorp to receive patient lab results and send orders created in Patient Records to the lab.

Installing Add-Ons

To install an Add-On:

1. Launch the download. The Autorun screen appears.

2. Click the **CGM LYTEC MD Add-Ons** link. A list of Add-Ons appears.

3. Click the link for the Add-On you want to install. The installer starts.

4. Follow the installation wizard for the Add-On.

Appendix D - MPIC

MPIC is an application that is installed and configured independently of CGM LYTEC. It will transmit data from CGM LYTEC to other applications. You can use MPIC to link CGM LYTEC to Practice Partner.

You can download the latest version of MPIC here: https://supportcenter.emds.com/richmond/articles/Richmond_VAR_KBA/LYTEC-and-LYTEC-MD-Download-Links

eMDs recommends that you download and open the MPIC User's Guide prior to installing or configuring MPIC. You can find the User's Guide on the CGM LYTEC Documentation page in Support Center.

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