Welcome!

CAREWare Quick Start guides will walk you through the basics of setting up, managing and using the main CAREWare functions. It is intended for non-technical users who just need to get basic information in and out of CAREWare.

About This Guide #1:
Downloading and Installing CAREWare

This document does NOT cover setting up CAREWare on a server or network, setting up multiple providers, or other more advanced topics. If you are installing CAREWare on a new machine, but transferring your data from another PC, please follow all the steps here and then refer to the Backup and Restore section of Guide #9.

 PLEASE NOTE: The client data used in these manuals is purely fictional.

Guides in this series:

1. *Downloading and installing CAREWare*
2. *Creating contracts and services*
3. *Entering Clients and their Service and Clinical Data*
4. *Customizing tabs and fields*
5. *Customizing clinical data*
6. *Prebuilt reports (including the RSR)*
7. *Creating basic custom reports*
8. *Creating more advanced reports*
9. *User and System Administration*

For additional information:

Please refer to the **Frequently Asked Questions** page on the CAREWare programmers' website:

http://www.jprog.com/wiki/

Or contact the help desk at cwhelp@jprog.com.

Revision date: September 21, 2012

First Things First
What do I need to get started?

Hardware (Your Computer)

You're going to need a computer powerful enough to run CAREWare:

It needs to be running at least Windows XP.

It should have at least 2 GB of RAM, 30gb Hard-drive and a 2.00 GHz processor (Pentium 4)**.**

If you are running CAREWare on a Wide Area Network (WAN) with multiple providers networked or connected to a central server, you'll need to consult with your IT departments regarding connection protocol, firewall settings, etc.

How can I tell if my computer is powerful enough?

Let's run a quick check.

1.   Click the **Start** button in the lower left hand corner of your screen.

   In XP, it looks like this:

   In Windows 7, it looks like this:

2.   On the right hand side of the menu, select the **Control Panel** option.
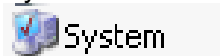
   XP:

   Windows 7:

3.   In XP, if you are in Category view, select **Performance and Maintenance**, then **System**.

   If you are in Classic view, select **System** from the list of options.

OR

If you are in Windows 7, select **System and Security**. Then under **System**, select **View amount of RAM and processor speed**.
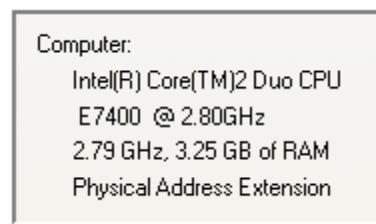
System and Security

System
View amount of RAM and processor speed

You'll see a display of your system setup:

Computer:
Intel(R) Core(TM)2 Duo CPU
E7400 @ 2.80GHz
2.79 GHz, 3.25 GB of RAM
Physical Address Extension

XP

System
Rating:	5.5 Windows Experience Index
Processor:	Intel(R) Core(TM)2 Duo CPU P7350 @ 2.00GHz 2.00 GHz
Installed memory (RAM):	4.00 GB
System type:	64-bit Operating System
Pen and Touch:	No Pen or Touch Input is available for this Display

Windows 7

ALTERNATE OPTION:

1. Open a Windows Explorer window, and right-click "My Computer" (XP) or "Computer" (Windows 7) and select "Properties" on the bottom of the menu.

The ".NET Framework"

You'll need a piece of free software called the "Microsoft .NET Framework version 2.0" installed on your computer, as well as the Service Pack 2 update. Go to the CAREWare website for the latest link for these files.

1. Under **System Requirements**, click the **Microsoft .NET Framework version 2.0** link.

2. You will be directed to a Microsoft.com page. Click the **Download** button.

3. Save the file to your Desktop.

4.   Double click the file to run and follow the instructions.

5.   Then, from **System Requirements** on the CAREWare page, click the **Service Pack 2** link.

6.   You will be directed to a Microsoft.com page. You will have several options here.

   a. If you are running Windows XP, download the **NetFx20SP2_x86.exe** file.

   b. If you are running Windows 7, refer to your system setup above. (Note that Windows 7 systems should already have the required .NET version installed.)

      i. If it says "32-bit operating system," download the **NetFx20SP2_x86.exe** file.

      ii. If it says "64-bit operating system," download the **NetFx20SP2_x64.exe** file.

7.   Save the file to your Desktop.

8.   Double click the file to run it and follow the instructions.

Windows 7 and Windows Vista users

Windows 7 and Vista users will need to perform an extra step before they can create clients in CAREWare, by installing "Message Queuing" as a Windows service.

1. Open the Control Panel.

2. Click **Programs** and then, under **Programs and Features**, click **Turn Windows Features on and off**.

3. Expand **Microsoft Message Queue (MSMQ) Server**, expand **Microsoft Message Queue (MSMQ) Server Core**, and then select the check boxes for the following Message Queuing features to install:

   MSMQ Active Directory Domain Services Integration (for computers joined to a Domain)

   MSMQ HTTP Support
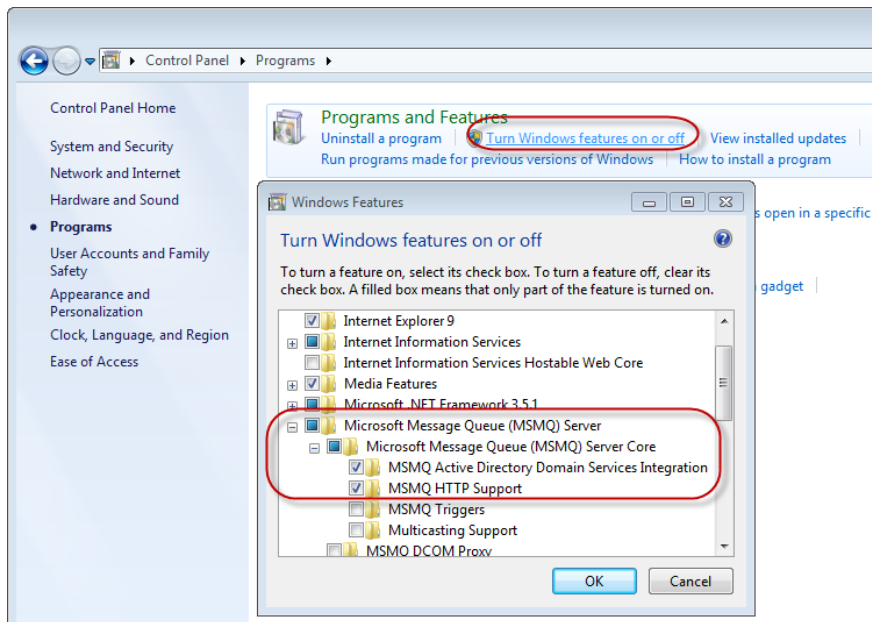
4. Click **OK**. If you are prompted to restart the computer, click OK to complete the installation

CAREWare 5 (latest build)

Next, you'll need to download CAREWare from the HRSA web site:
http://hab.hrsa.gov/manageyourgrant/careware.html.

> If you're upgrading the business tier, simply download the latest build. **It is highly recommended that you remove your current build using the Add/Remove Program function (Windows XP) or Programs and Features (Windows 7) in your control panel before installing the updated build. Please see the section, "Upgrading the Business Tier," later in this document.**

> If you're new to CAREWare, you'll be downloading and installing the full setup file and then upgrading the business tier build.

Installing CAREWare (full version, including client, data, and business tiers)

PLEASE NOTE: This is for a single user or LAN setup. For more complicated installations (wide area network, firewalls, etc.), please contact the CAREWare helpdesk.

<u>If you are a Windows 7 user</u>, you will need to be the administrator of your computer. Ask your technical support person for these permissions if you do not have it, or have that person begin the install for you as an 'Administrator'. We recommend that CAREWare be installed under the actual User Profile, whenever possible.

1.   You should first change your User Account settings in Windows to ensure a smooth installation.

    a. Open the Control Panel and go to User Account settings.
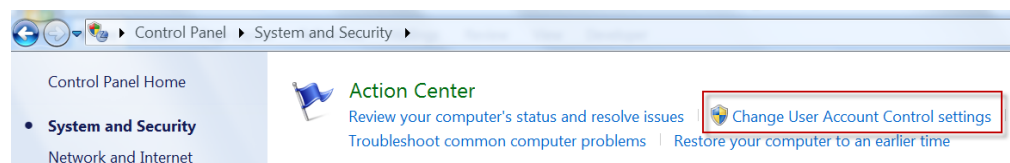
    b. Set the notifications to **Never Notify**.
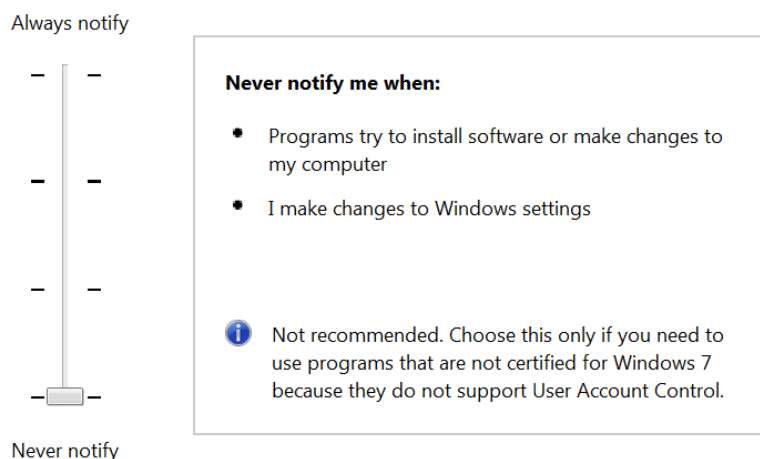
2.   After downloading, double-click the CAREWare Setup file.

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3. You'll see this screen:
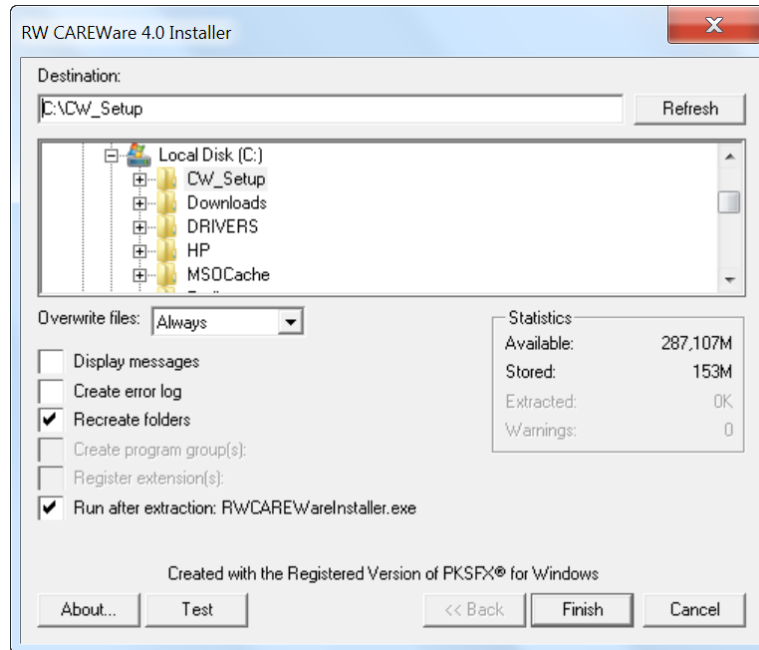
NOTE: The menu header refers to the "4.0 Installer," but this will install the 5.0 version.

4. You will be prompted to unzip files to C:\CW_Setup. Change the directory if you wish, then click **Finish**.

5. Make sure the box is checked next to "Run after extraction: RWCAREWare Installer.exe"

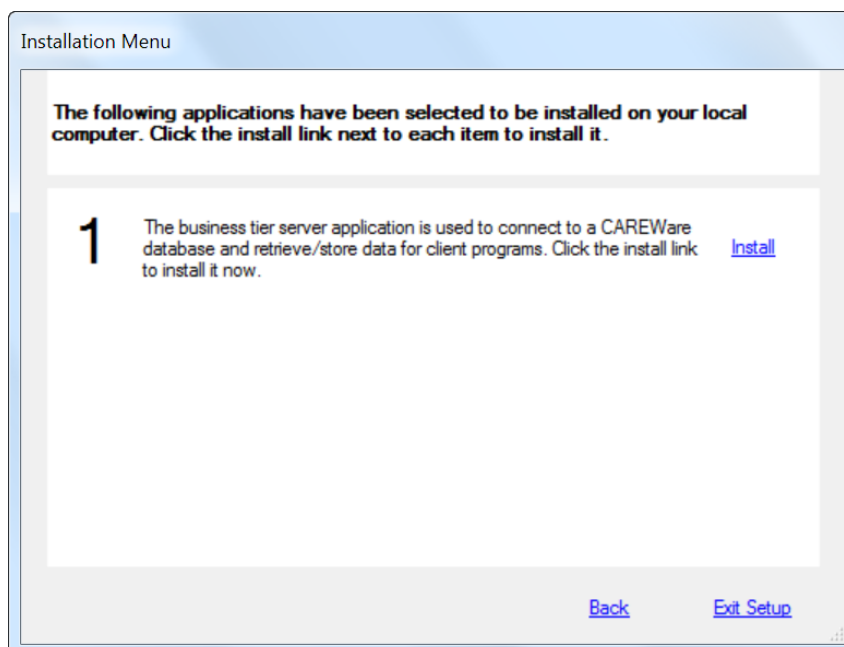6. When prompted to run the CAREWare installer, click **Yes**.
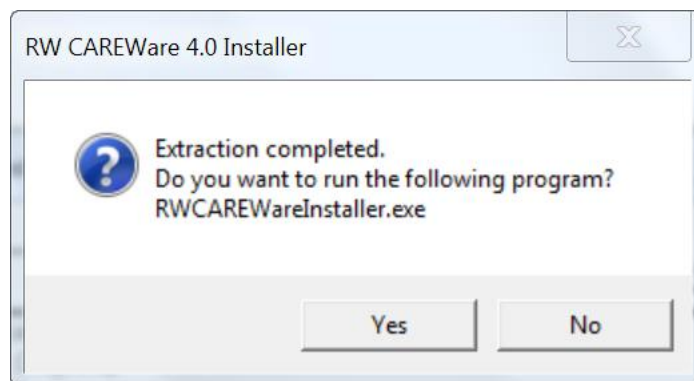
7. You will be prompted to install CAREWare's separate components, or "tiers."

Installing the Business Tier

1. Check the box next to the Business Tier (first option) and click **Next**.
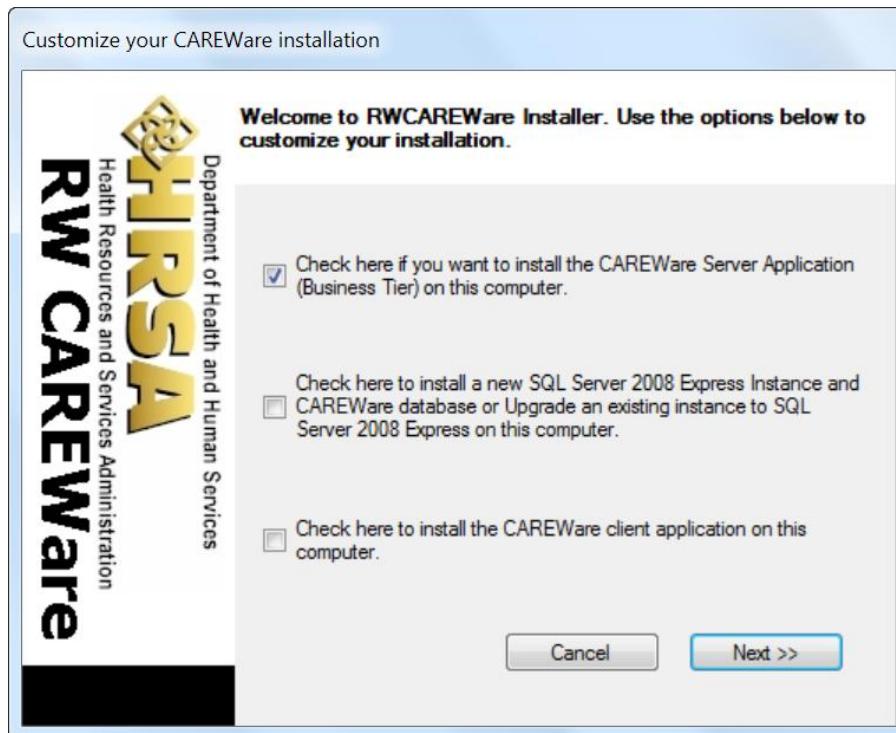
2. Click **Install** next to the install information.

3. When the Setup Wizard appears, click **Next**.

4. You will be prompted where to install the business tier. The default installation address is: C:\Program Files\CAREWare\RW CAREWare Business Tier\. [Program Files (x86) on a 64-bit machine.]
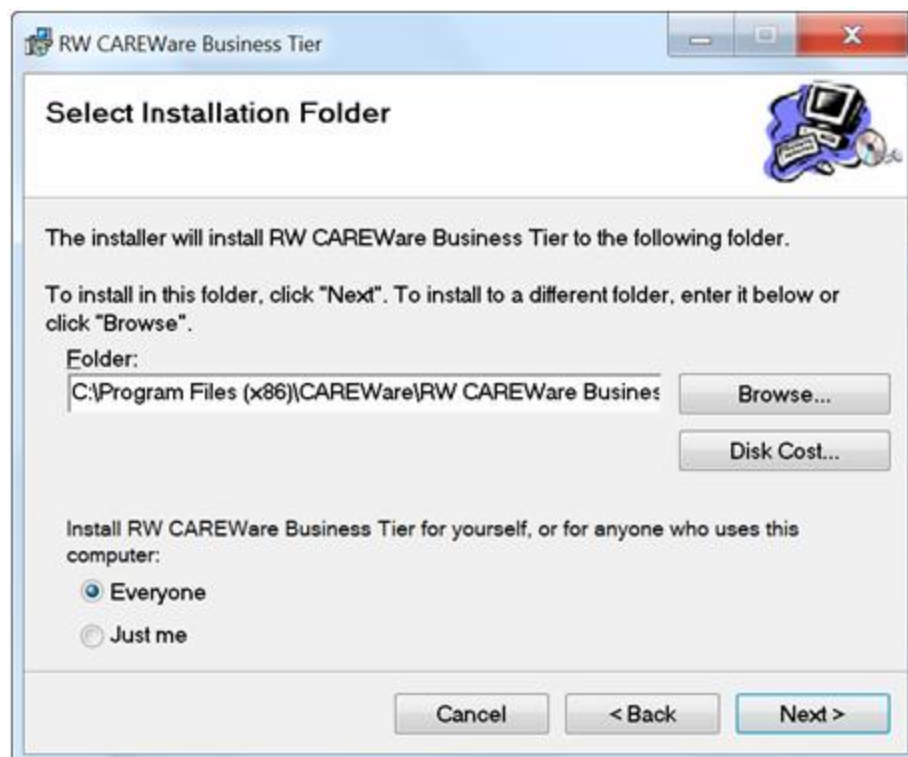
NOTE: If you are on a local area network, we recommend installing the business tier on a file server. This will ensure that custom reports, user permissions, etc. will be backed up daily with all other file server data.

The "Everyone" and "Just me" options refer to how Windows handles network users.

If you install CAREWare for "Everyone," this will allow other network users who sit at your machine, but log onto your computer as themselves, to see the application and use it. <u>This is our recommended setting.</u>

 If you select "Just me," only you will see the application when you are logged into your machine as yourself. "Just me" is an extra layer of security; however, if you select "Everyone," you won't have to reconfigure CAREWare each time a computer is transferred to a new user.

5.   Click **Next**.

6.   You'll be asked to confirm the installation. Click **Next**.
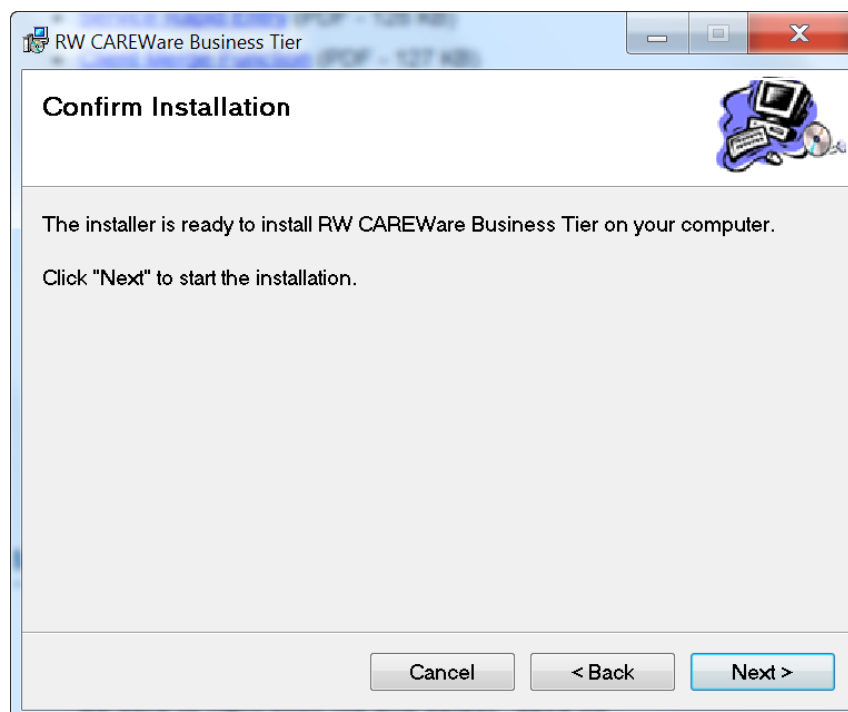
The End User License Agreement contains important information on legal responsibility and use of the data. On the Terms page, select "I Agree" and click **Next**.
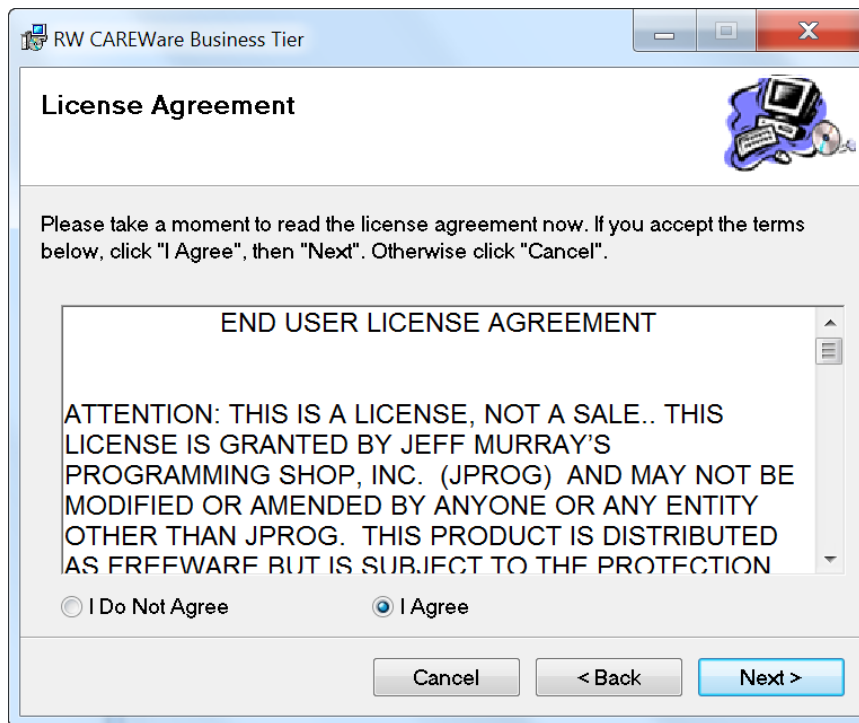
The business tier will install. You'll get an Installation Complete message at the end of the process.
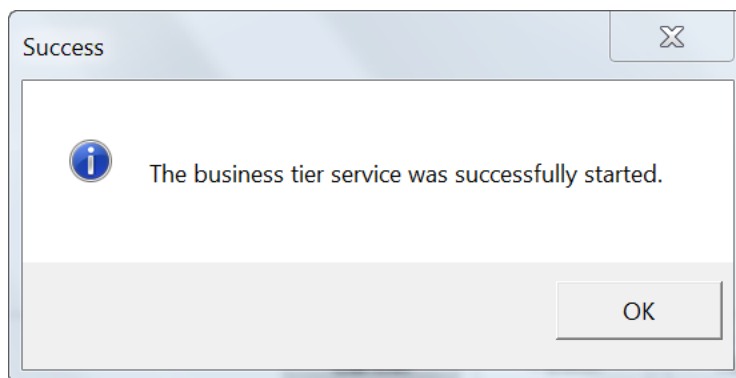

7.   Click **OK**. You will be returned to the install menu.

8.   Click **Back** to move to the next phase.

INSTALLING THE DATA TIER

CAREWare data is stored in a database using a format called "SQLServer©" (SQL stands for Structured Query Language). You don't need to worry about this unless you are working in an organization that maintains other SQL Server databases on the same server as CAREWare. If

you have an IT manager or consultant, we recommend that you consult them before selecting an existing SQL Server instance.

1.   Check the box next to the SQL Server Express Install option and click **Next**.
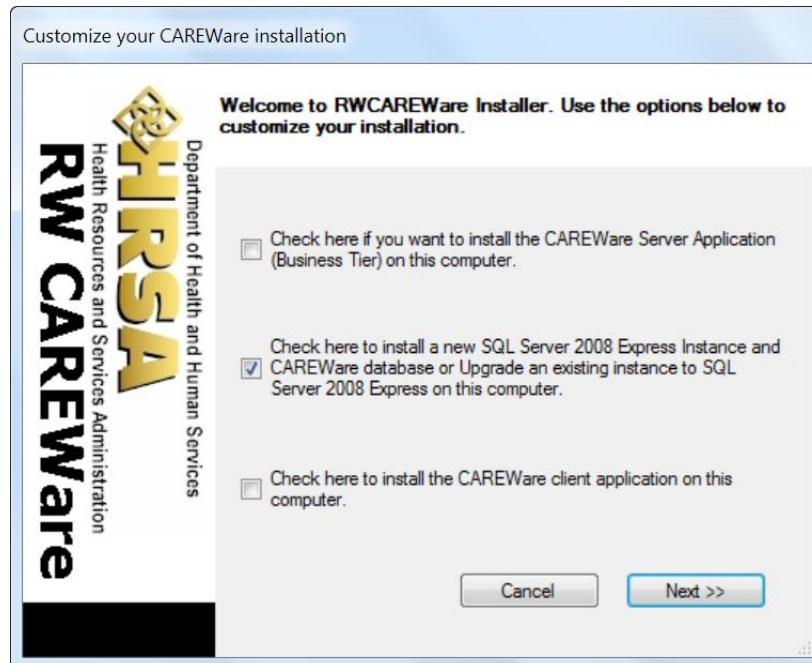
2.   Click **Install** next to the install information.
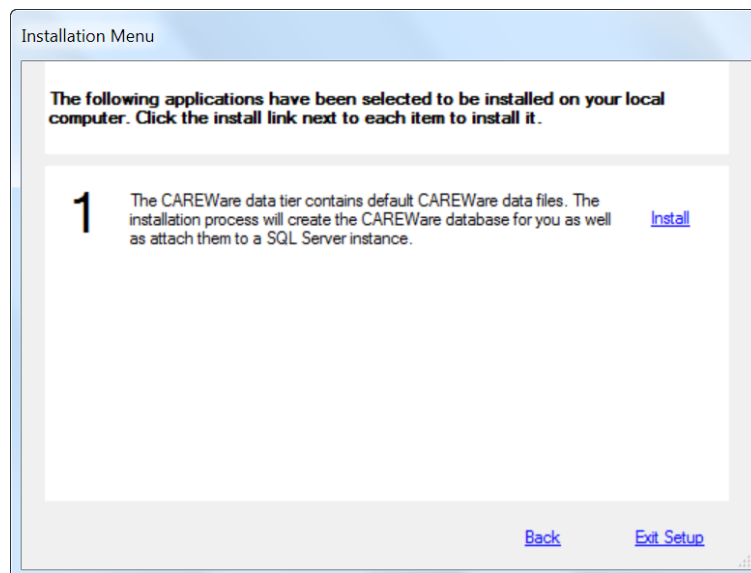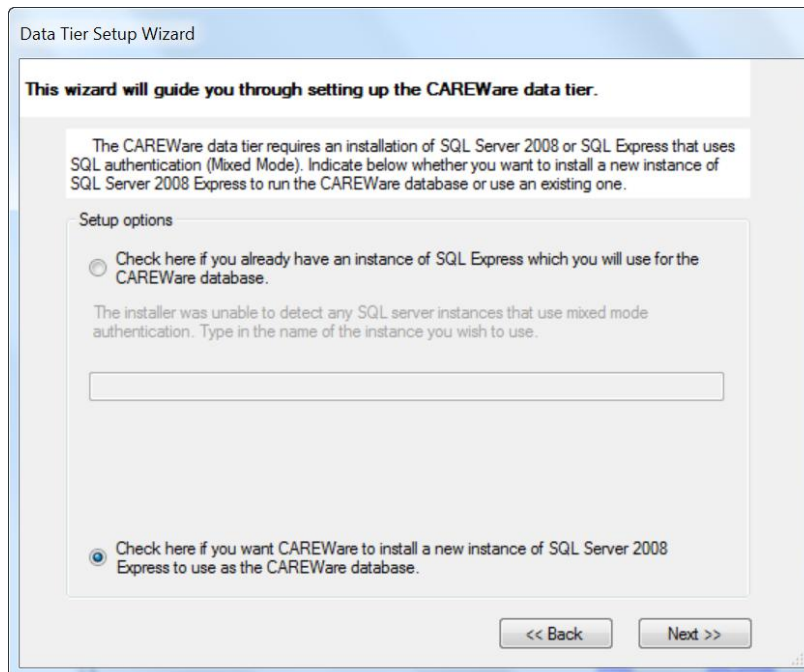

3.   Select Domestic or International installation, depending on your location, and click **Next**.
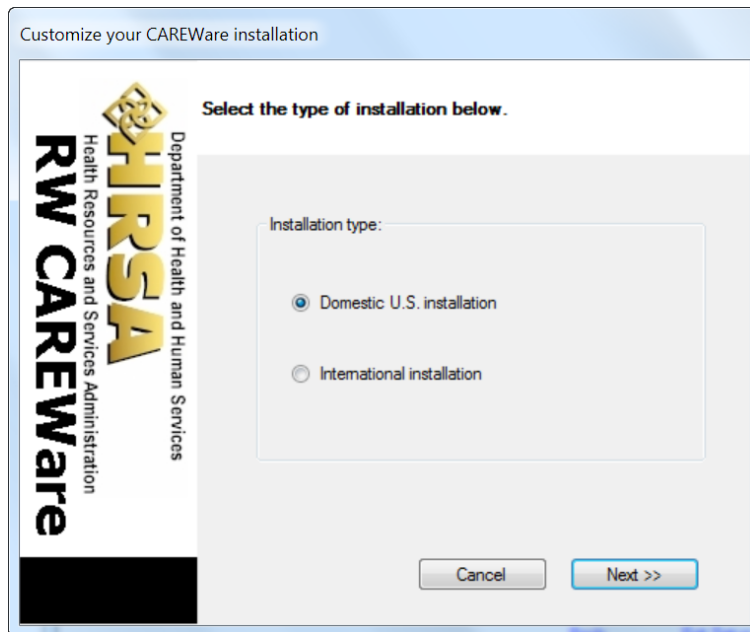
4.   The Data Tier Setup Wizard will display.

       If you don't have a SQL Server database you're linking to, select "Install a new
       instance of SQL Server 2008 Express." If you have an older instance of SQL Server,
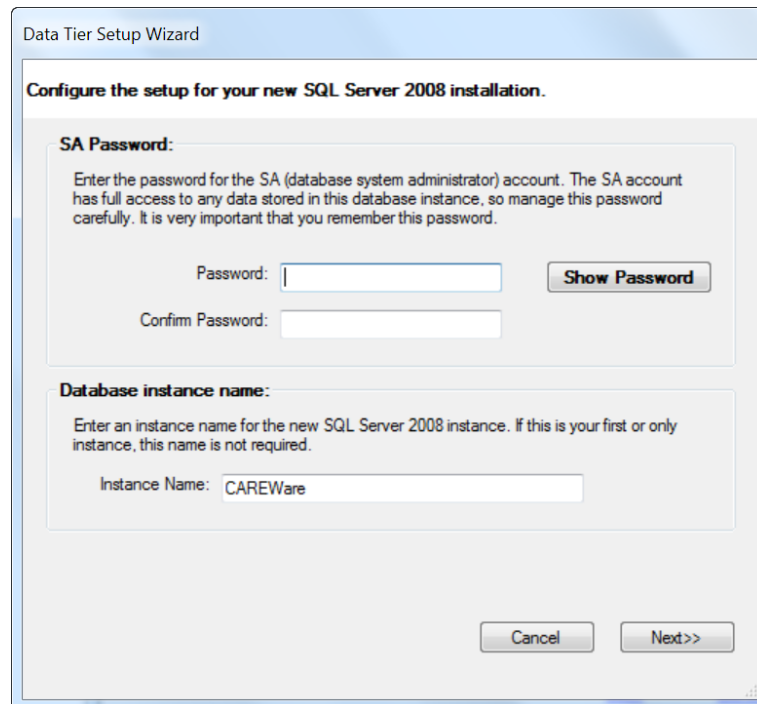   you can select it and upgrade it to 2008.
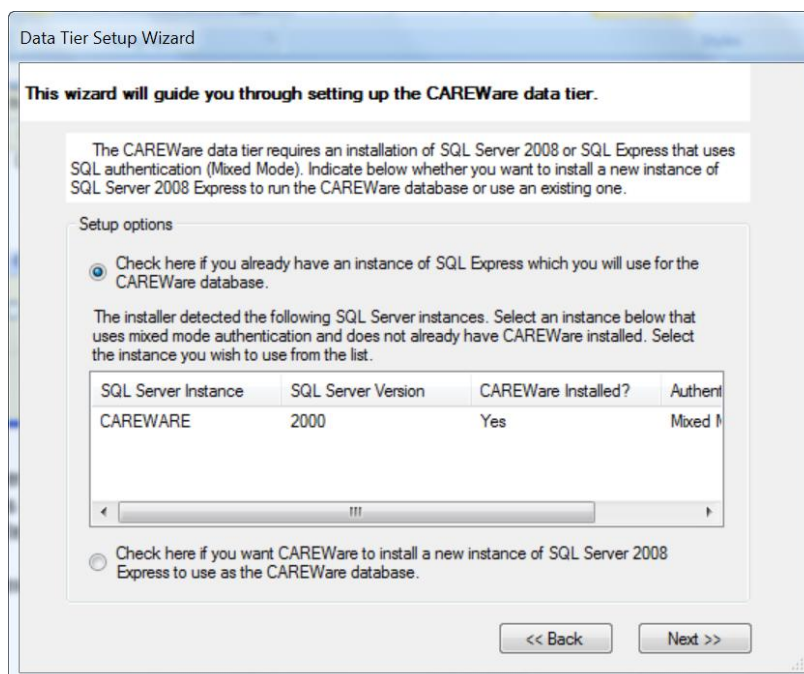
In the first screenshot, CAREWare recognized a previously installed instance of the database. In the second, which is for a fresh install of CAREWare, you would not see that and you would check the item on the bottom to install a new instance.

5. Click **Next**. You'll be asked for some more database information.

     a. For an existing database, seen below, you'll be asked to provide the SA password (System Administrator password) for that database.
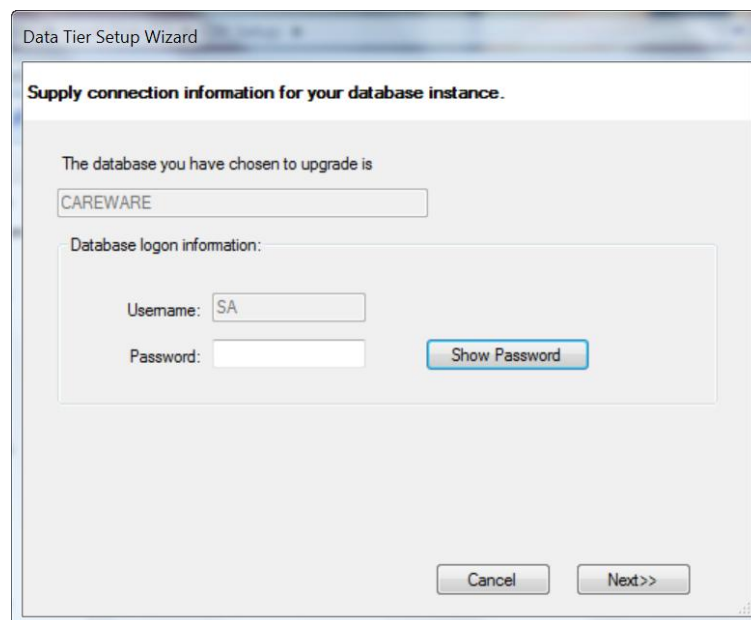
b. For a new database, seen below, you'll be asked to configure the setup, including creating an "SA password" (System Administrator password) for the new database.

For network systems running SQL Server, these passwords are critical as they protect against unauthorized database access. Database Administrators of network installations should manage and maintain these passwords. This is not the same as your CAREWare login password.

c. The SA Password has specific requirements, seen below. "Password," for instance, would not be an allowable password.
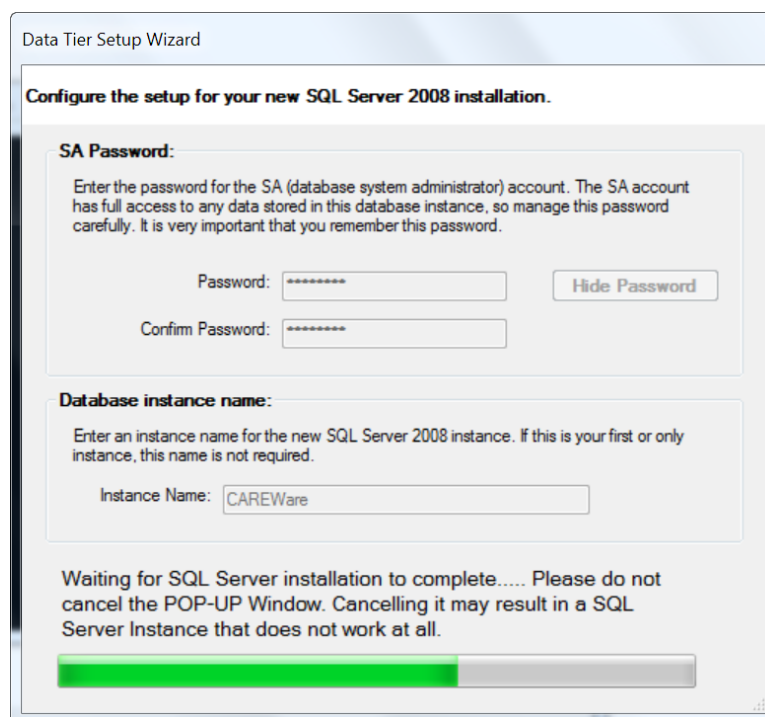

An example of an acceptable password would be Pa$$word1. **(Do not use this example!)**

> ***WARNING/REMINDER: Write down the SA password and store it in a safe place; if lost, you will not be able to access your data!***
>
> ***The help desk has encountered a number of instances where the individual who originally installed CAREWare changed the SA password, has since left the agency, and did not write down, document and pass this info along to other staff members! That password (and the individual) are nowhere to be found.***

    d. By default, the database instance name is CAREWare. It's recommended you leave this as is.

6.   Click **Next** to continue. The screen will refresh with a message about installation.

The pop up window will look like this. As noted, DO NOT CLOSE IT.
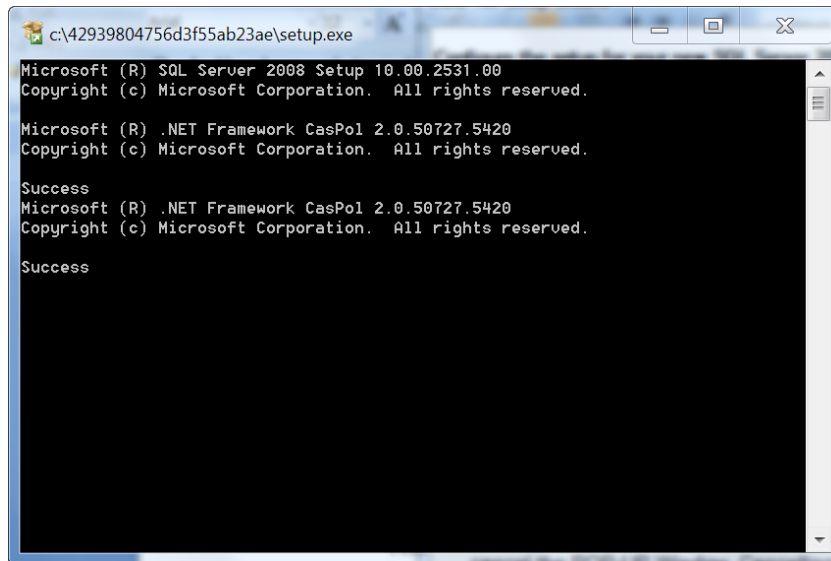
This installation process may take some time. The green bar's progress is not indicative of actual progress, so don't be alarmed if the bar starts over.

7. You'll now be asked for the SA password for the database. If you want to make sure you're typing it correctly, click **Show Password** to see the characters instead of ********. Enter the password and click **Next**.
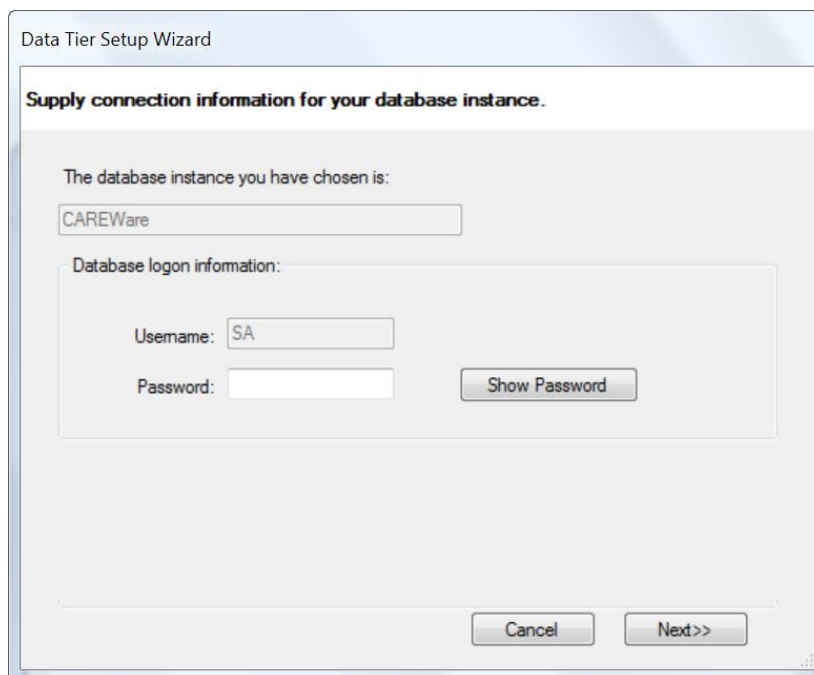
8. A success message will appear after the install.
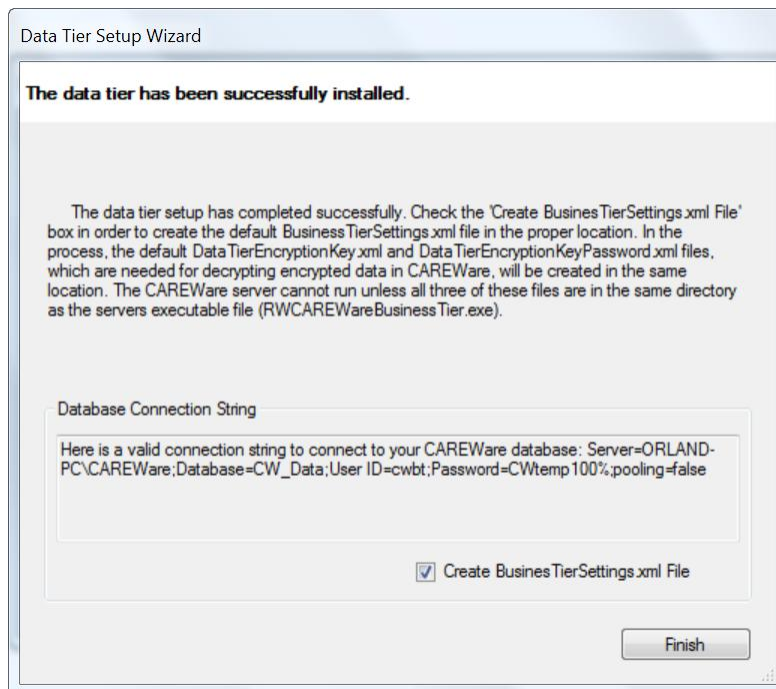
9. The CAREWare database owner is the default user of CAREWare, named "**cwbt**." The default password is "**cwbt100**." This is the pa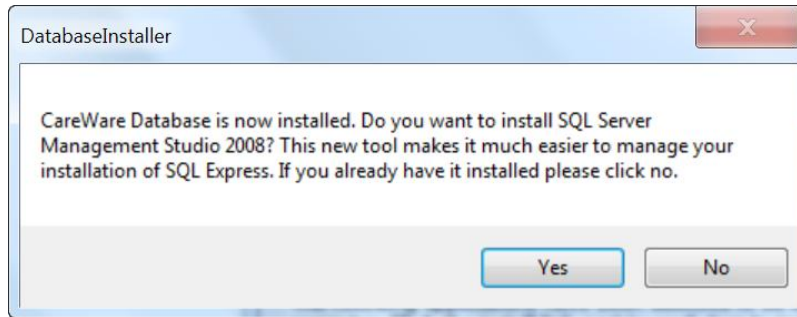ssword that connects your specific CAREWare Business Tier to the Database. **(This is not your CAREWare login/password.)** Again, because this password is public, we recommend that you change it – and store it in a safe place. But again, DO NOT Lose this password. Smaller agencies may simply wish to retain the default "cwbt".

10. Click **Finish**. You'll see a success message for the BusinessTierSettings.xml file creation. You may need to access this file in the future; see QS 9 for more information.
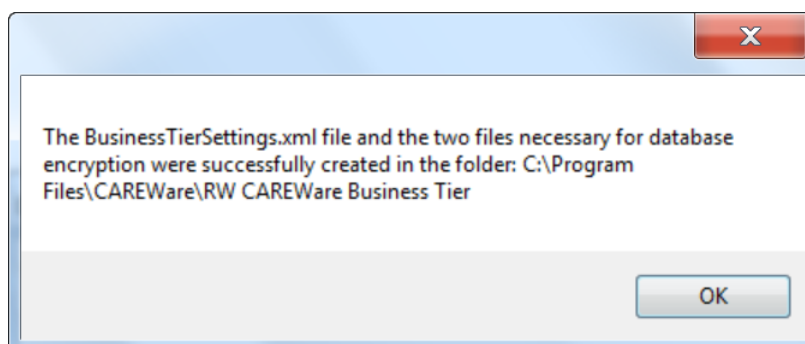
11. Click **OK**. You'll receive a popup asking if you'd like to install SQL Server Management Studio. This is not necessary, but recommended as it will allow a number of database management tasks, including troubleshooting, to be performed in the future.

DatabaseInstaller

CareWare Database is now installed. Do you want to install SQL Server Management Studio 2008? This new tool makes it much easier to manage your installation of SQL Express. If you already have it installed please click no.

Yes   No

This link will take you to the CAREWare programmers' website, which has a number of links to required/recommended tools. For your reference, if you want to click "No" here, the direct link to SQL Server Management Studio 2008 is:

http://www.microsoft.com/downloads/details.aspx?familyid=08e52ac2-1d62-45f6-9a4a-4b76a8564a2b&displaylang=en

AT THIS POINT, WE RECOMMEND YOU RESTART YOUR COMPUTER. This will ensure that the business and data tiers are performing properly when you install the Client Tier.

INSTALLING THE CLIENT TIER

1.   If you have restarted your computer before continuing, go to the CW_Setup folder you created (C:\CW_Setup is the default) and double click the **RWCAREWareInstaller** file.

(OR, at this point in the install, you can click the RWCAREWareClientTierSetup file to go directly to the Client Tier install.)

2.   Check the box next to the Client Tier Install option and click **Next**.
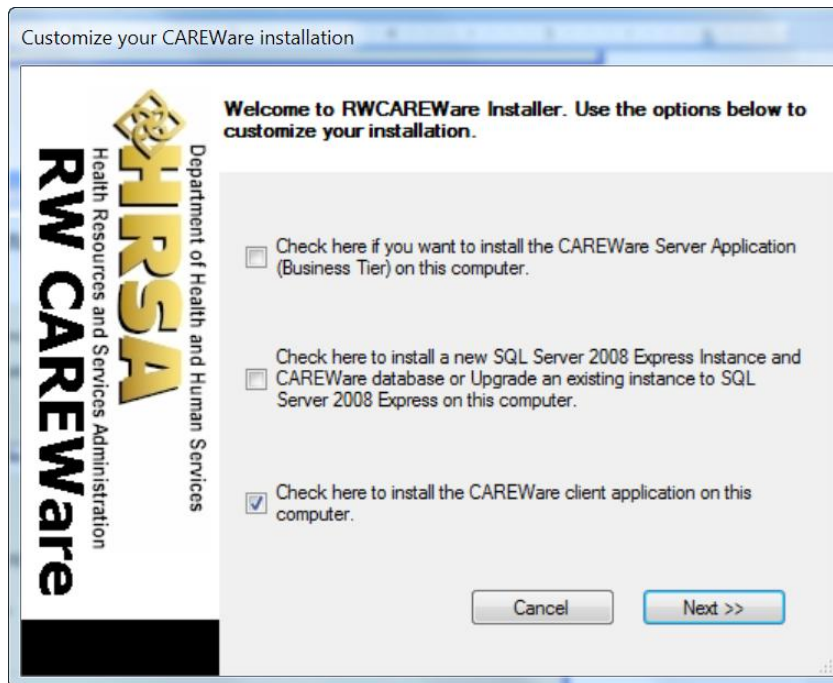
3.   Click **Install** next to the install information.
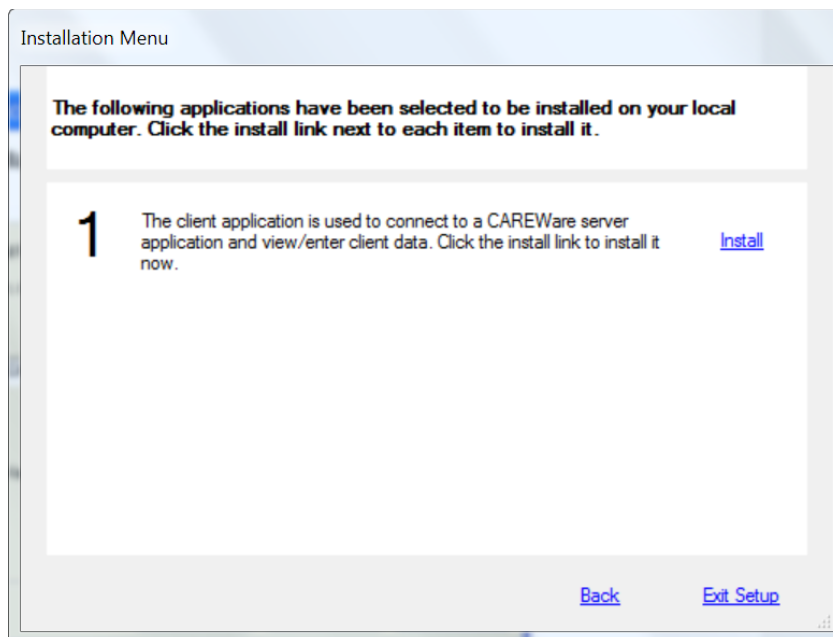
4.   Click **Next** from the Welcome screen.

5.   You will be prompted where to install the client tier. The default installation address is C:\Program Files (X86)\CAREWare\RW CAREWare Client Tier\. Use Browse… to find a different location. Disk Cost will tell you whether or not you have room on the target location for the installation.

The "Everyone" and "Just me" options are described above under the Business Tier installation section.
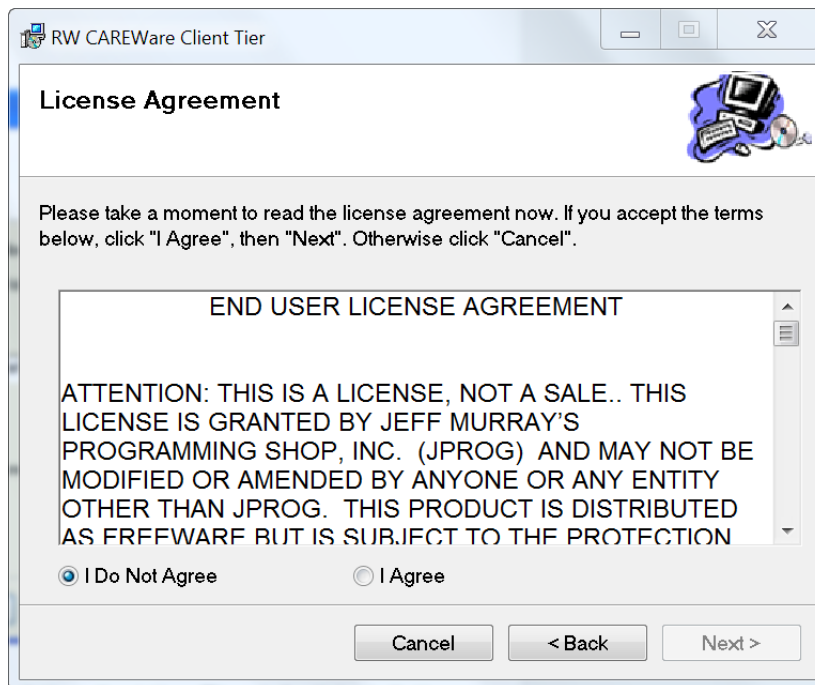
Click **Next**.
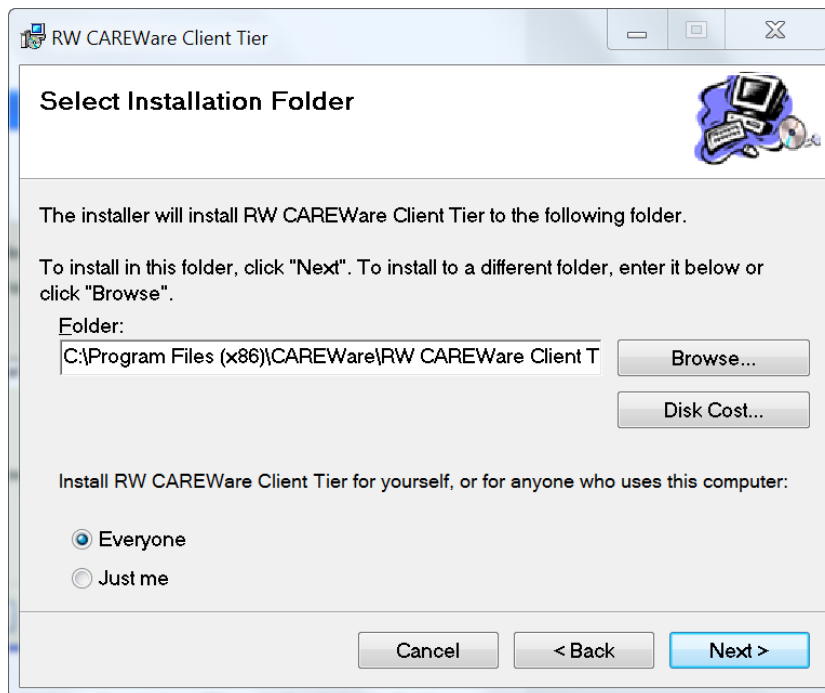
6.   Click **Next** to start the installation.
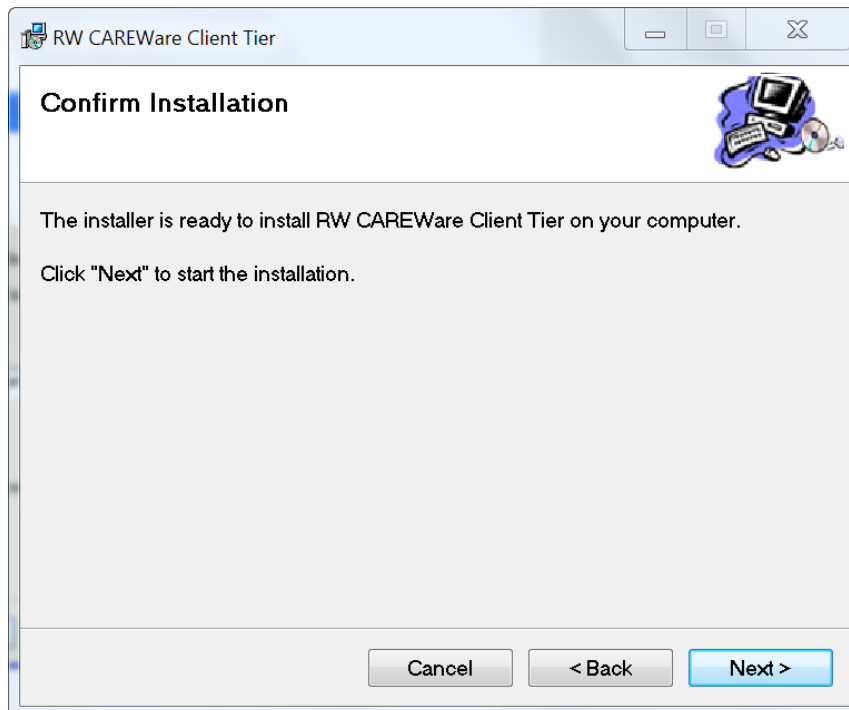
7.   Agree to the Terms. The client tier will install. Afterward, you'll be returned to the install menu. Click **Exit** to finish.

8.   You'll get an **Installation Complete** window.
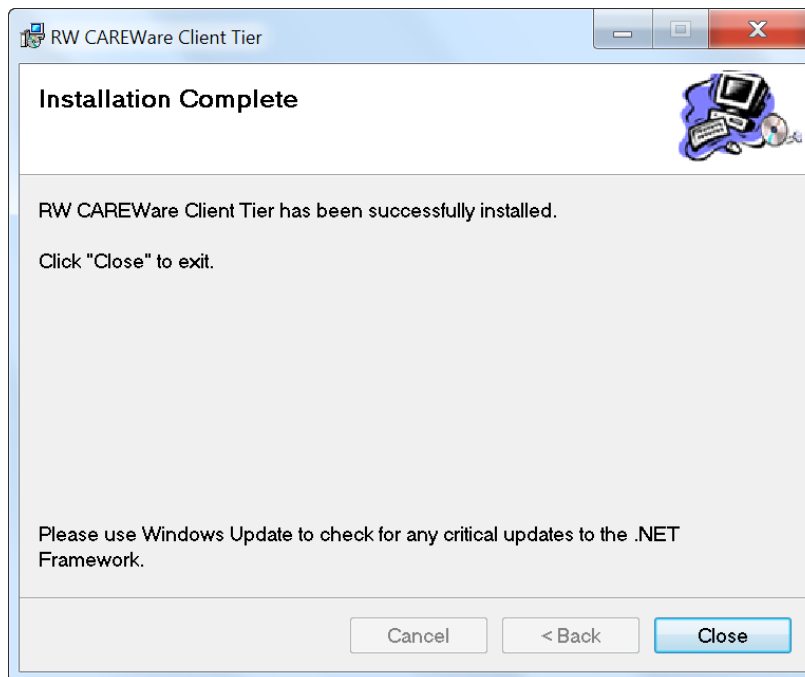
9.   Click **Close** to return to the menu, then **Exit** (or just Close if you ran the Client Tier setup directly.)

10.   Remember to go back to the Control Panel / User Account settings, and reset your notification settings back to the default level:

Choose when to be notified about changes to your computer

User Account Control helps prevent potentially harmful programs from making changes to your computer.
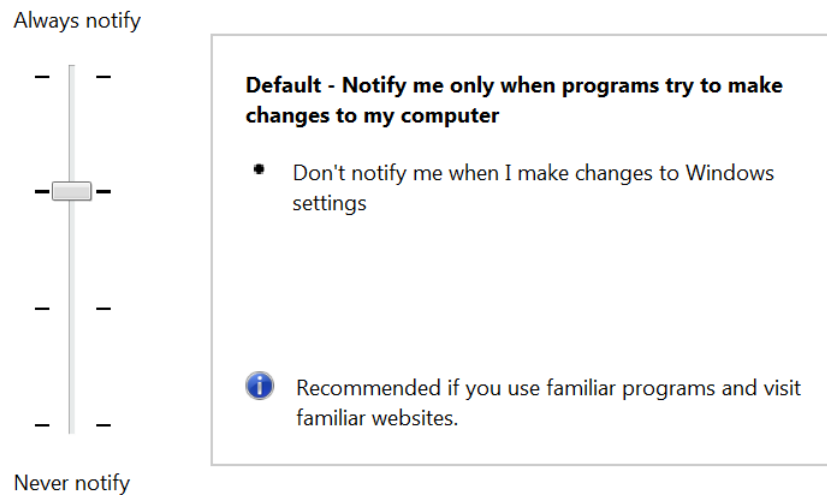Tell me more about User Account Control settings

Always notify

Default - Notify me only when programs try to make changes to my computer

- Don't notify me when I make changes to Windows settings

ⓘ Recommended if you use familiar programs and visit familiar websites.

Never notify

*** Important Notes on Passwords**

We recommend the following:

1. Leave the Business Tier (BT) username and password as they are shipped with CAREWare, namely 'cwbt' and 'cwbt100'.

2. Keep the default username and password (cwtemp and TEMPCW100) until you are fully comfortable using CAREWare and creating user accounts and assigning user rights.

   Remember that HIPAA Security rules will require you to create new user names and passwords and remove the "cwtemp" user once you have created and tested your new user accounts and rights, since this login is publicly available information and comes with all permissions, and retention of this login could compromise data security.

Upgrading the Business Tier only

If you are already a CAREWare user, and you only need to upgrade the Business Tier, you can follow the steps below. Following all these steps makes a clean upgrade more likely. Note that the screen shots below are for Windows 7.

Uninstall the Current Business Tier

1.   Use the Control Panel to uninstall the Business Tier from your computer.

   a. IN WINDOWS XP:

   Click **Start**, click **Control Panel**, and then double-click **Add or Remove Programs**.

   In the Currently installed programs box, select the RW CAREWare Business Tier, and then click **Remove**.
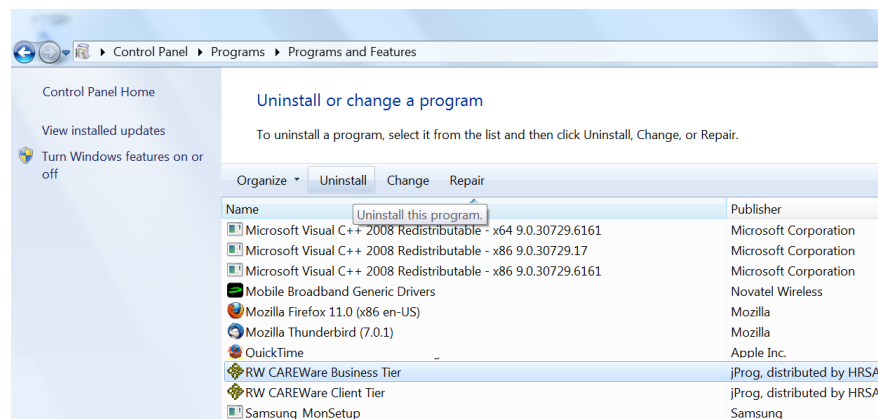
   If you are prompted to confirm the removal of the program, click Yes, then follow the instructions onscreen.

   b. IN WINDOWS 7:

   c. Click **Start**, then **Control Panel**, and then click **Uninstall a Program** under Programs and Features.
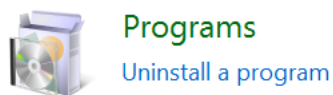
   d. From the list, select the RW CAREWare Business Tier, and then click **Uninstall**.

     e. Follow the directions onscreen to complete the removal of the business tier.

Install the new Business Tier

> <u>If you are a Windows 7 user</u>, you will need to be the administrator of your computer. Ask your technical support person for this privilege if you do not have it, or have that person begin the install for you under their privileges.

1.   Download the new business tier from the HRSA Website to your desktop, then double click it to begin the install.

2.   Start CAREWare as you normally would and log in. You will be given a message asking you if you want to upgrade the business tier.

3.   Click OK/YES. After the process has completed, you'll be prompted to log in again, and the business tier upgrade will complete.
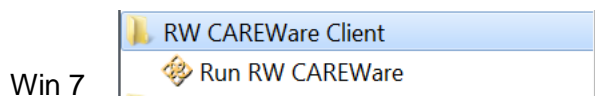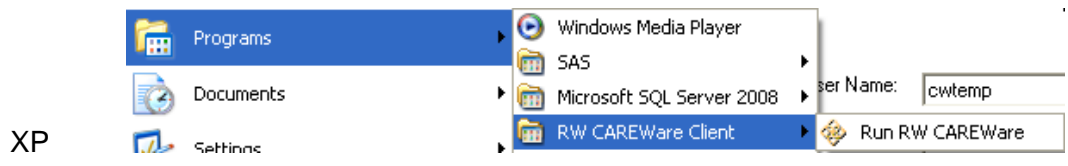
> IMPORTANT: Once the business tier has been upgraded, all users on a network will be prompted to automatically update their client tiers upon their next login.

Running CAREWare for the First Time

1.   After you've successfully completed installation, go to the **Start** menu and select **All Programs**.

XP

Windows 7
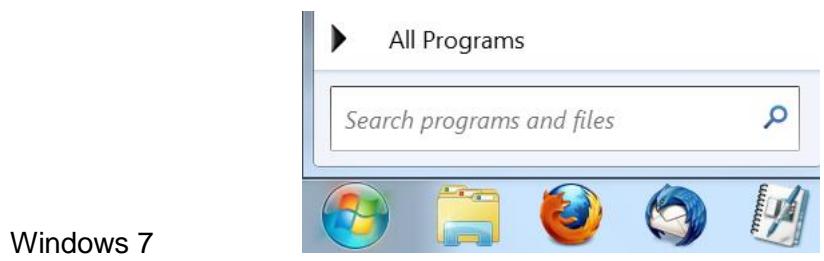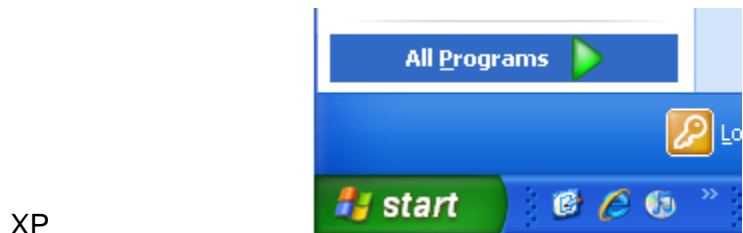
2.   Find RW CAREWare Client and click **Run RW CAREWare.**

XP

Win 7

The initial CAREWare login screen will appear.

You will see the current business tier build number under Version 5.0, in this case 545.

3. Enter the default login user, **cwtemp** and the default password, TEMPCW100. This is case-sensitive, so make sure TEMPCW is in caps.

4. If you have installed CAREWare on a stand-alone system, you can click Login. If you are using CAREWare on a network, you'll have to select your server. Click the Options button to see server information.

The default server is your local computer.

Except for agencies running CAREWare behind a firewall, the port number should remain 8124.

If you are connecting to CAREWare on a server, click **Server List** to see or add other servers. Check with your System Administrator to obtain the correct CAREWare 'server name/address'.
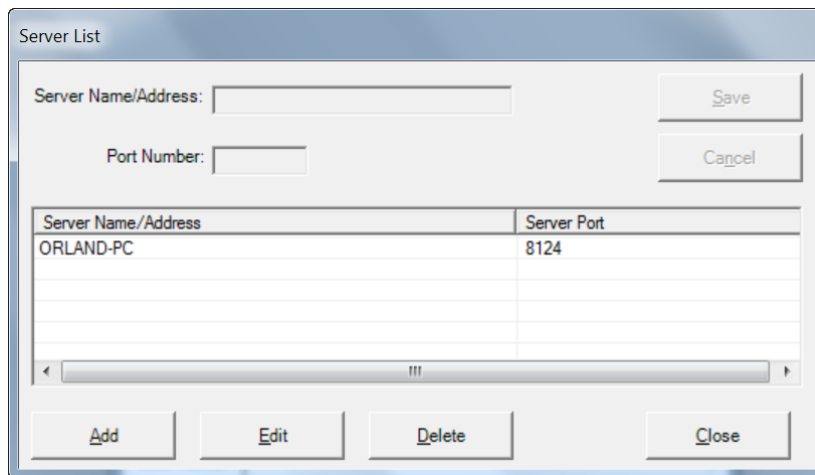
5. After you enter your password and click **Login**, you'll be prompted to choose a domain. This is how CAREWare manages access to provider domains by users, versus 'super users' who also have access to the Central Administration domain.

"Standard" provider domain users you set up later won't see this menu as they'll be directed into their default provider domain.
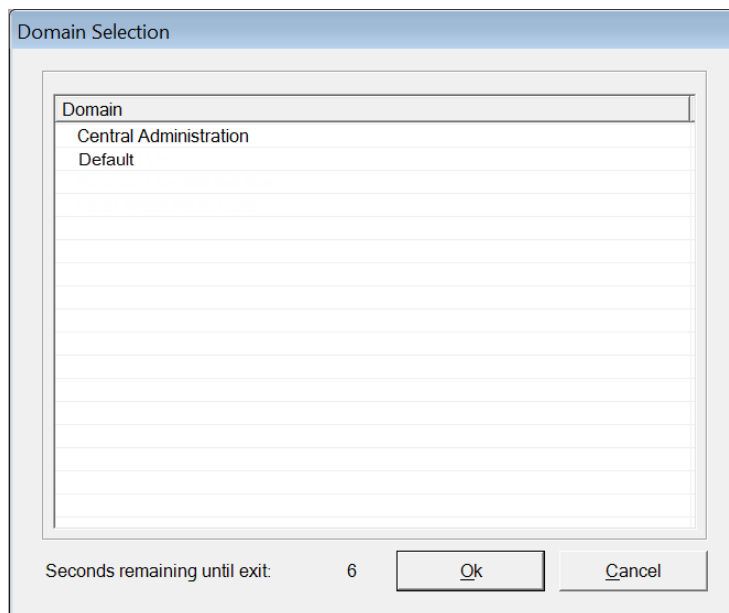
You'll have 20 seconds by default to choose a domain.

6. Select "Central Administration" for access to high-level configuration options, or "Default" to go directly to your provider database, which will be empty on a clean install.

Where do I go from here?

For information on configuration, see the guide, "User and System Administration."

For information on restoring from an existing CAREWare database, see the guide "User and System Administration."

For information on setting up services, see the guide "Contract and Service Setup."