



StockTaker Server Set Up Instructions

Version 2.0.0

Table of Contents

Overview	2
System Requirements	2
Assumptions	2
Setting Up the Web Server Machine	4
Setting Up the StockTaker Network Shares	4
Setting up the Event Log directory	6
Installing StockTaker Web	7
Setting up StockTaker Web	9
Setting up the StockTaker Web Services	10
Setting up the StockTaker Database	12
Uninstalling StockTaker Web	13
Trouble Shooting	14
Support	14

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Overview

- The installer will install the following server components:
 - **StockTaker Web:** This includes StockReceiver Web and StockTaker Scheduler. StockReceiver Web is used to manage StockReceiver users and view purchase order delivery details. StockTaker Scheduler is used to create, manage and view stock take schedules.
 - **StockTaker Database:** A Microsoft Access database where the StockTaker Scheduler and StockReceiver information is stored.
 - **StockTaker Web Services:** The Web Services are used by the handheld application to retrieve data from the StockTaker database. The handheld application also uses the Web Services to download data from and upload data to network shares. See **Setting Up the StockTaker Network Shares** later in this document for more information.

System Requirements

- The computer(s) on which StockTaker is set up must meet the following requirements:
 - **OS:** Windows XP Professional, 2003 Server or 2008 Server
 - **.NET Framework:** Version 2.0 of the .NET Framework must be installed on the machine hosting the Web Services and StockTaker Web
 - **IIS:** Version 6 or greater must be installed on the machine hosting the Web Services and StockTaker Web.
 - **MS Access:** MS Access 2000 or 2003 must be installed on the machine hosting the StockTaker database.
 - **IE:** Version 6 or greater must be installed on all machines that will access StockTaker Web.

Assumptions

- The StockTaker Web Services, StockTaker Web and the StockTaker database will be hosted on the same machine.
- The machine hosting the StockTaker Web Services, StockTaker Web and StockTaker database will be connected to the network.
- The machine hosting the StockTaker network shares will be connected to the network.
- The machine hosting the StockTaker Web Services, StockTaker Web and StockTaker database will be able to access the machine hosting the network shares. Note, they can all be hosted on the same machine.
- Any remote health facilities using StockTaker will be able to access StockTaker Web and StockTaker Web Services via the intranet/Internet.
- End users will be able to access the StockTaker network shares via the MEDITECH Materials Management Application.

- End users will be able to access the StockTaker network shares directly to delete stock take data that has been uploaded from the handheld.

Setting Up the Web Server Machine

If the Web Services and the network shares are located on different machines, a mirrored local account will need to be set up to allow the Web Services to access the network shares. This is not required if the Web Services and network shares reside on the same machine.

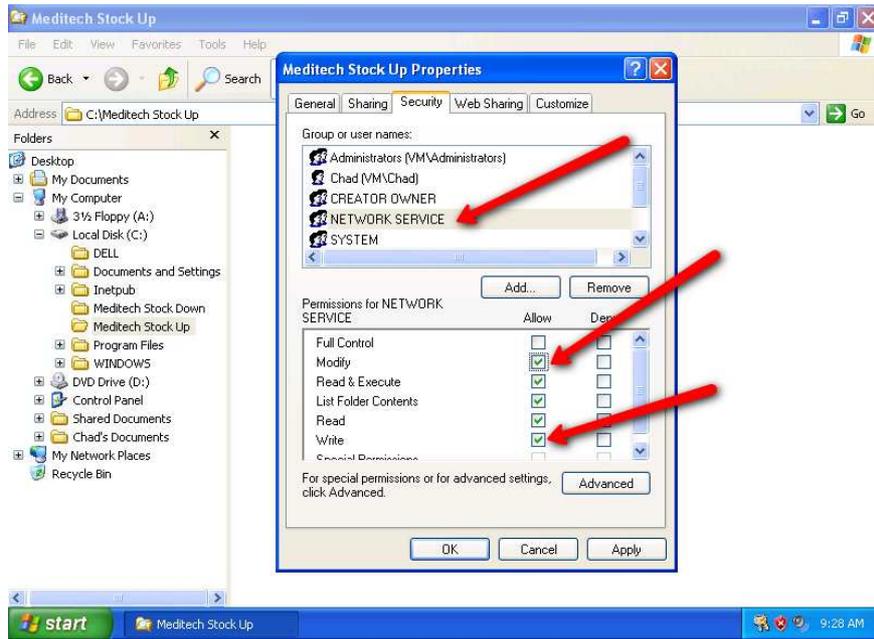
NOTE: If the server machine is a member of an Active Directory the ASP.Net account will be the NETWORK SERVICE.

Internet Information Server (IIS) Application Pool Settings

- StockTaker Web Services and Web Scheduler virtual directories must be configured to use .Net Framework version 2.0.x application pools with managed pipeline mode set to "Classic".
- The application pool identify must be set to "Network Service".

Setting Up the StockTaker Network Shares

- 1) Two shared folders need to be created for each health facility that will be using StockTaker. One folder for storing stock list files extracted from MEDITECH and another folder for storing stock take data files downloaded from the handheld devices to be uploaded to MEDITECH. If StockReceiver is being used, a third network folder needs to be created for the purchase order NPR's.
- 2) These network shares will need to be accessible from the machine hosting the StockTaker Web Services. Note, the Web Services and network shares can reside on the same machine.
- 3) If the machine is using local shared folders the NETWORK SERVICE account must have read/write access to these directories.
- 4) The NETWORK SERVICE account will need modify permissions on all the folders created in step 1.



Setting up the Event Log directory

- 1) Create a folder on the web server machine for writing event logs. By default, both StockTaker Web and Web Services write to C:\Temp\EventLogs\
- 2) The NETWORK SERVICE account will need modify permissions on this folder.

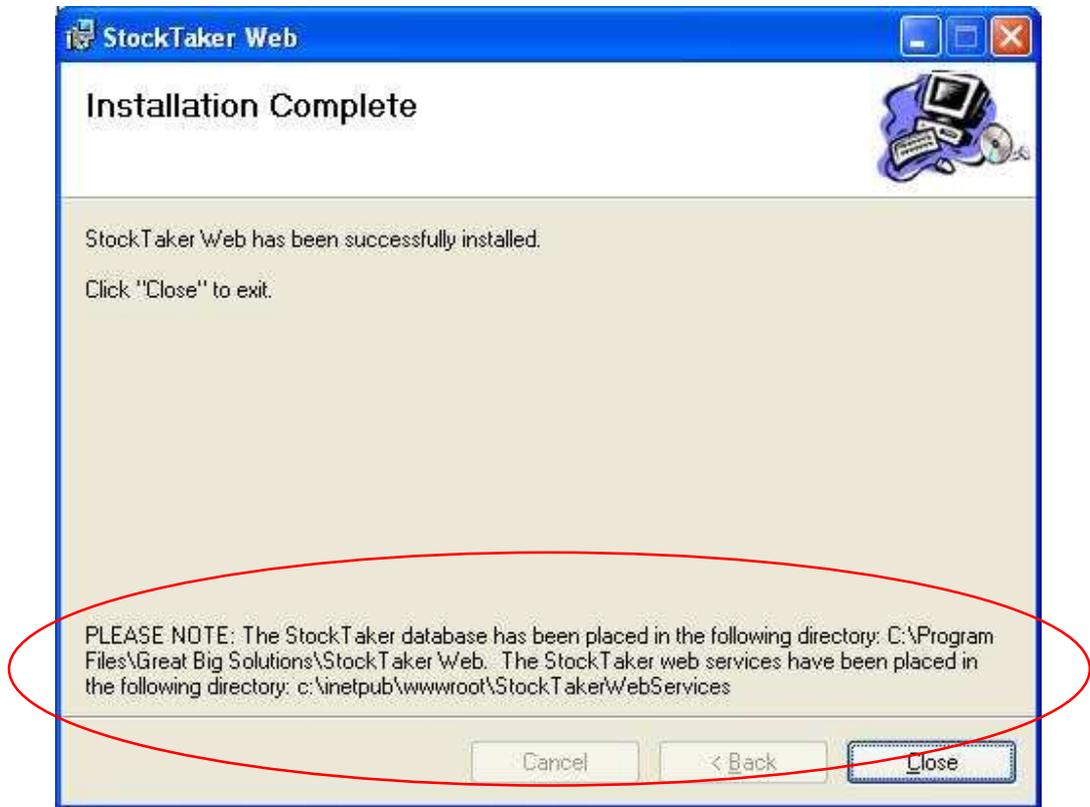
Installing StockTaker Web

- Run the install MSI (WebAppsInstaller.msi) to install the StockTaker Web, Web Services and database:
 - 1) Specify the name of the virtual directory where StockTaker Web files will be placed (e.g. StockTakerWeb). This should create the virtual directory for StockTaker Web and place all the required files there.



- 2) A virtual directory will automatically be created for the Web Services. The name of the directory will be **StockTakerWebServices**.
- 3) The database will be placed in the following folder:
C:\Program Files\StockTaker\StockTakerWeb
 - Note that the database will contain a default admin account when created. The user name and password of this account are **admin** and **admin** respectively.

Review the final screen of the installation to confirm the location of the Web Services and database.



Setting up StockTaker Web

- 1) Locate the web.config file in the StockTaker Web virtual directory. Locate the <appSettings> tag in this file.
 - a. Update the Data Source parameter in the DbConnectionString value to the path of the StockTaker database. For example, if the default folder is used, the DbConnectionString would look like:

```
<add key="DbConnectionString"
value="Provider=Microsoft.Jet.OLEDB.4.0;Data Source=
C:\Program Files\StockTaker\StockTaker
Web\StockTakerDB.mdb;Mode=Share Deny None;Persist
Security Info=False;Jet OLEDB:Database Locking
Mode=1"/>
```

- b. Update the SignaturePath value if you have changed the folder where signature images are stored. A default folder is created during the install process and the path in the web.config file should be correct.

```
<add key="SignaturePath" value="Signatures" />
```

- c. Update the LogPath value to the Event Log folder path. For example, if the Event Log folder path is c:\Temp\EventLogs\, the LogPath value would look like:

```
<add key="LogPath" value="c:\Temp\EventLogs" />
```

NOTE: You must use double backslashes “\” for file paths stored in the web.config file.

- 2) StockTaker Web is now set up. To test that the install worked correctly, try to access StockTaker Web from a web browser on the web server machine:
e.g. <http://localhost/StockTakerWeb/MainForm.aspx>

Setting up the StockTaker Web Services

- 1) Locate the web.config file in the Web Service's virtual directory. Locate the <appSettings> tag in this file.

NOTE: You must use double backslashes "\\" for file paths stored in the web.config file.

- a. Update the Data Source parameter in the DbConnectionString value to the path of the StockTaker database. For example, if the default folder is used, the DbConnectionString would look like:

```
<add key="DbConnectionString"
value="Provider=Microsoft.Jet.OLEDB.4.0;Data
Source=C:\\Program Files\\StockTaker\\StockTaker
Web\\StockTakerDB.mdb;Mode=Share Deny
None;Persist Security Info=False;Jet
OLEDB:Database Locking Mode=1"/>
```

- b. Update the SignaturePath value if you have changed the folder where signature images are stored. A default folder is created during the install process and the path in the web.config file should be correct.

```
<add key="SignaturePath"
value="c:\\inetpub\\wwwroot\\StockTakerWeb\\Signatur
es"/>
```

- c. Update the LogPath value to the Event Log folder path. For example, if the Event Log folder path is c:\Temp\EventLogs\, the LogPath value would look like:

```
<add key="LogPath" value = "c:\\Temp\\EventLogs\\"/>
```

- d. Update the DeleteStockLists value as required. Set this value to true if you want StockTaker to delete stock lists once they have been downloaded to the handheld. With a value of true, StockTaker will only download stock lists that were created today. With a value of false, StockTaker will not delete downloaded stock lists and will ignore the date the stock list was created.

```
<add key="DeleteStockLists" value="true"/>
```

- e. Update the StockListExtension value as required. This value represents the file extension of the stock list files that are downloaded from MEDITECH. Set this value to an empty string if the stock list files do not have an extension.

```
<add key="StockListExtension" value="*.inv"/>
```

- f. Update the StockTakeExtension value as required. This value represents the file extension of the stock take files that are uploaded into MEDITECH. Set this value to an empty string if you do not want the files to have an extension.

```
<add key="StockTakeExtension" value=".HHT"/>
```

- g. Update the NPRFileExtension value as required. This value represents the file extension of the purchase order NPR's that are extracted from MEDITECH. Set this value to an empty string if the NPR files do not have a file extension.

```
<add key="NPRFileExtension" value="*.txt"/>
```

- h. Update the DeleteNPRs value as required. Set this value to true if you want StockTaker to delete purchase order NPR's once they have been downloaded to the handheld.

```
<add key="DeleteNPRs" value="true"/>
```

- 2) The Web Services are now setup. To test that the install worked correctly, try to access the Web Services from a web browser running on the web server machine:

e.g. <http://localhost/StockTakerWebServices/WebServices.asmx>

Setting up the StockTaker Database

- 1) The StockTaker database (StockTakerDB.mdb) is installed when the installer is run and is placed in the following folder:

C:\Program Files\StockTaker\StockTakerWeb

NOTE: Make sure the ASPNET account has modify permissions on the database and the folder in which it resides.

- 2) The database will contain no data except for one entry in the Users table. This entry allows a Schedule administrator to login to the Scheduler application to initialise the database as required:
 - a. Set up new users
 - b. Enter health facility and cart details
 - c. Create stock take schedules.
- 3) The database is now setup.
- 4) NOTE: The StockTaker application will fail if the StockTaker database is open in another application (such as Access).

Uninstalling StockTaker Web

Use **Add or Remove Programs** in the Control Panel to uninstall StockTaker Web. This will remove the StockTaker Database, StockTaker Web Services and StockTaker Web from the server.

Note that you will need to manually delete the Signatures folder and its content along with its parent folder (StockTaker Web). The default location for this folder is \Program Files\StockTaker\StockTaker Web\

Trouble Shooting

- **StockTaker Scheduler cannot locate the MEDITECH input and output folders:**

This can occur if the NETWORK SERVICE account on the machine hosting StockTaker Web and the StockTaker Web Services or the machine hosting StockTaker network shares is altered in any way.

To resolve this issue:

1. Reset permissions on the input and output folders for the NETWORK SERVICE account.

Support

- For support, please contact StockTaker:
 - Email: support@stocktakersoftware.com
 - Web: www.StockTakerSoftware.com