Note: The *Configuration* tab will now remain as a feature of the logon screen. In the event of the network failing, or a laptop not connected to the network, the LOCAL configuration can be selected when required in the same manner.

Synchronizing Sources

Introduction

A source contains a complete set of information regarding a practice, including patient files, billing information, appointment information and user information. Many practices will have secondary sources such as a laptop source, RIP Source and possibly a backup source somewhere on the network. These secondary sources need to be kept in-sync with the master source on the server.

How a source is created is documented in the *Installation Guide* and is normally performed at installation time.

There are two types of source: *Master* and *Slave* and dependent upon the type(s) being synchronised various options will/will not be available. Regardless of source type the procedure is quite straightforward.

Synchronisation Technique

1) Start HEALTHone[™] and login to ONE OF THE SOURCES TO BE SYNCRONISED.

2) Click on the Synchronise Sources button on the Standard Toolbar.

Illustrated opposite.

• The Synchronisation Wizard start.

There now follows a series of screens the first of which is just an opening screen and can be by-passed in the future by ticking the *Do not display...*box





3). Click Next - choose the direction of synchronization and press next.

In order to synchronise synchronise data with ar	lealth sources, you need to specify another sourc d the way of the synchronisation process	æto 💭
Select the source		
Select source	Selected source :	
Do you want to upload or	download your data ?	
E		
JohnSOURCE		
Change direction	Synchronisation in both directions Compact database before.	

4).Click next – choose the data you would like to synchronise. – Click next.



Last synchronise <u>H</u> CRs Destination C Don't synchronise deleted patient C Synchronise audit trai Synchronise uger information Synchronise billing	Select the kind(s) of synchronisation What do you want to synchronise ? For each to provide some parameters.	type of synchronisation, you will be asked
Synchronise <u>HCRs</u> Destination Onl synchronize deleted patient C Synchronize audit trai Synchronise audit trai Synchronise training Synchronise training		Last synchronisation dates
Destration Contract and the patient Synchronize deleted patient Synchronize deleted patient Synchronize audit trai Synchronize training	Synchronise <u>H</u> CRs	
Synchronise deleted patient Synchronise audit trail Synchronise ugit information Synchronise billing	Oestination On't synchronize deleted patient	Advanced {Archive of patient} -
Synchronise audi trai Synchronise uger information Synchronise billing	C Synchronize deleted patient	
Synchronise uger information Synchronise billing	🔲 Synchronise audit trail	
Synchronise billing	🔲 Synchronise user information	
	Synchronise billing	
		Back Next> Finish Cancel

5) Click Next and Finish – to start the synchronisation.

HEALTH one Synchronisation	on Wizard
	Synchronisation wizard All synchronisation parameters are entered. Press the finish button to start the synchronisation. Synchronisation can take time. You can press the escape key to abort the synchronisation process.
	<u> < B</u> ack <u>N</u> ext> <u>Finish</u> Cancel



Typically in the case of a laptop the direction of synchronisation when *leaving* the practice would be **Server to Laptop** and when *returning* **Laptop to Server**. There is also an option to synchronise in both directions – , naturally, this would take longer to perform.

Options

a) Synchronise HCR's Patient Files

b) *Don't /Do synchronise deleted.*. Patient's deleted in one source can optionally be deleted in the destination source.

c) Advanced (Archive..) This option is for archiving files, for example if deceased patient's are being synchronised to an RIP source. Options control what will happen to the files in the original once synchronised to the destination.

Don't delete ... Files left intact.

Delete HCR...Moves patient files to the deleted patient selector screen. Delete permanently...Permanently delete the files in the original source. d) Audit trail Only applicable for Slave/Master synchronisations – synchronises the audit log.

e) User information Only applicable for Slave/Master

synchronisations – Changes in Master Source users – i.e. new users, password changes, rights changes etc.

f) Billing Billing information.

g) Appointments Appointment information.

