

Hardware Technician Portal Setup Check List

Data Tec [Does Not](#) install or help setup the Portal Software, this setup must be performed by a qualified Network & Internet Technician. We recommend: Miken Technologies at (314)961-0501. They can provide the service remotely via the Internet, and they charge a reasonable price.

- Purchase and install the “unlimited # of users” version of the Easy File Web Server (EFWS) from www.web-file-management.com to an always-on computer.
****We strongly recommend installing the EFWS on the SERVER****
- Be sure to update the EFWS software to the latest version *after* installing it.
- Create a special Folder called **EZWPortal** which must be in the root directory of the shared network drive where the PowerSoftMD Data Bases Reside.
- Forward two ports on your router. Typically, the EFWS program defaults to port 80 for remote connections and port 443 for secure (SSL) connections. If you are having trouble doing this for your particular router model, you can go to <http://portforward.com> for help.
- Make note of your external IP address. To get this information, go to www.whatismyipaddress.com and write that IP address down.
- WARNING: If you have a dynamic (changing) IP address, you will have to use a Dynamic DNS (DDNS) service such as dysdns.org to set up a static address to use instead. ****WARNING** If you don't do this the PORTAL will stop working after a few days!**

- After updating the EFWS software to the latest version, generate a 256-bit SSL certificate in EFWS. To do this, you run a file called **makecsr_256.bat** in the EFWS's program directory. This will generate the files you need to send to a Certifying Authority (CA) such as GoDaddy.com. For additional help, see the "Generating SSL Certificate" help file in EFWS.
- You will need to send the generated files from the previous step to a Certifying Authority (CA) for approval, and they will typically require that you purchase a website name as well. We recommend GoDaddy.com for this. Once you have a website name, you must go into the setup of your new website and forward that website the IP address you got from www.whatismyip.com.
- Generally, you will have to purchase a website name, such as patients.drsmith.com and an SSL certificate with a file. Put the file in the root directory of the EFWS program.
- Start the EFWS program. Once this program is running, be sure to:
 - Click the "User Account" icon on the left side of the screen,
 - then click the "Option" button on the right side,
 - then select the third option "Create a New Virtual Folder for This Account."
 - Put the direct, Windows Network path to the server.
FOR EXAMPLE: [\\SERVER-PC\Data\EZWPportal\](#)
DO NOT use the shared drive letter for this.
 - On the user permissions box below, make sure only "View" and "Download" are checked. Click OK.
 - Also, delete all existing users.
 - Under the "Virtual Folders" section, delete all sample/test folders from this section before beginning first use of the web server program.

- Under the “Groups” section, add 3 new groups: “**patients**” and “**doctors**” and “**carriers**” (without the quotation marks and all in lowercase)
IMPORTANT : Make sure *ALL* the groups are “disabled” Otherwise, all users will be able to see each other’s folders!
- Under the “Options” section, uncheck both “Enable Guest...” options.
- Under the “Service” button, click “Install Service” then click “Start Service.”
- Be sure that only the “Start SSL Service” box is checked.
- EMAIL SETUP: Under the “SMTP setup,” set this to your office’s email settings. You will need to know the office email’s Server, Port, Authentication, Account, and Password.
- Go to the Windows Control Panel→Administrative Tools→Services and set the “Easy File Web Server” service to “Log On” as the Administrator. You might also have to enter the Administrator’s password.
- Restart the service.
- On the computer that the EFWS program is installed on, you must share the folder that the EFWS program is installed in across the windows network. Make note of this shared path, which should be something like [\\SERVER-PC\Easy File Management Server\](#) **This folder must be shared with FULL Permissions for ALL Users!**
- Create two separate sample patients’ portal UserID’s/Passwords**
- Go to the website you set up do this OUTSIDE of your office network, perhaps on a home computer. Try to sign in exactly as each patient would and click through to make sure you can see whatever files should be there for that specific patient only.**
- Email Data Tec support@powersoftmd.com this document once these steps are completed.



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Practice Name: _____

Phone: _____

Server Access: IP Address: _____

UserID: _____

Password: _____

Portal Address: https://_____

Signature who Completed

Date

Troubleshooting

- If your users can log in, but don't see any files:
 - Try editing EFWS service to login as a user who has administrative access to the network drives, not just the 'LocalSystem' account (this would be done in the Control Panel->Administrative Tools->Services)
- If using PowerSoftMD and you get ****ERROR**** Open DB error 1 then:
 - you might not have the option.ini file in the c:\ezw\emr\pgms folder
 - the option.ini file points to the wrong path
 - the folder that the EFWS is installed to does not have permissions set to allow All Users Full access
- If your users get a big red warning about "this website certificate is not valid" when visiting the website:
 - The certificate is not installed correctly. You will have to consult with your Certificate Authority, such as GoDaddy, Verisign, etc.