

IM 2020 Overview & How to Upgrade

Agenda

- I. IM 2020 Features Overview
- Jeff Piepenburg
- II. Data Innovations Upgrade Program
- Miranda Spears & Matt Taylor

Join the Advisory Council!

Email us at AdvisoryCouncil@datainnovations.com



Provide input
Your expertise is a
valued commodity



Learn
what is top-of-mind
to your colleagues



Teach
Share your
knowledge



Make new contacts
Expand your professional
network



It's fun
We want to expand and spin-off
different focus groups

Upcoming Events

April 28th - Virtual User Group

- Pooled Specimen Testing
- Improved workflows for QuantiFERON-TB DiaSorin LIAISON® XL testing
- Best practices for Instrument Manager Upgrades
- Autoverification and Rules Troubleshooting
- May 4th – Pooled Specimen Testing with University of Massachusetts
- May 10th – East Coast Regional Webinar





IM 2020 Features Overview

Jeff Piepenburg

Three new features



Time Zone Support



End of Support for
"Hard" Keys



Support for Server
2019

Time Zone Support

- Currently, all time is displayed as server time
- IM 2020 will allow customers to provide an offset for instrument connections
- Customer will see *most* time and date stamps as “localized”
- Date Stamps only will still be server-based
- Does not apply to Lab Intelligence
- Licensable feature available at no charge

Time Zone Support Continued

The screenshot shows the 'User Security - System Settings' window. The 'General Security Settings' section is expanded, showing a list of settings. The setting 'Enable timezone awareness for this IM Server' is highlighted in blue and set to 'No'.

Setting	Value
Authentication Method	Instrument Manager
Domain	
Disable Data Innovations Support User	No
Automatic Logon	No
Automatic Logoff	No
Idle Timeout in Minutes	15
Default System Layout	IM_ADMIN
Default Layout Master User	- None -
Show only the connections to which users have access	No
Automatically Encrypt All Specimen Event Log and Communications	No
Disable User After Number of Days Since Successful Logon	0
Disable User After Number of Unsuccessful Logon Attempts	0
Require reauthentication prior to performing actions within IM	No
Require Read Back before Releasing Results	Yes
Enable timezone awareness for this IM Server	No
LDAP	
IP Address	
Distinguished Name	
Password	
Enable Transport Layer Security (TLS)	Yes

The screenshot shows the 'Connection Properties - Jeff' window. The 'Destination Line(s)' list is expanded, and 'CAP e-Lab Solutions' is selected. The 'Advanced Options' section is also expanded, and the 'Device Timezone' dropdown is highlighted in yellow, showing '- None -'.

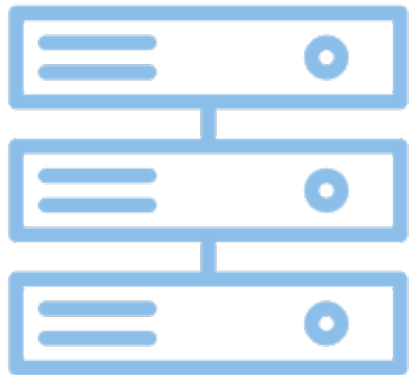
Connection Name: Jeff
Configuration Name: Jeff
Site: [Dropdown]
Location: [Dropdown]
 Start on System Start

Destination Line(s):
 Abbott Heme 3
 ABSciex
 Apollo 2
 ASI
 Automated Storage
 Barcode Printer
 Beckman Heme 01
 CAP e-Lab Solutions
 Cell Counter
 CellaVision
 Chem Inst 01
 Chem Inst 02
 Chem Inst 03
 Chemistry MREI
 ChemOMatic 9700
 Coag Inst 01
 Demo File I/O
 Diasorin XL Sim
 Doctors Data
 Hunter v2

Number of Days to Keep:
Incoming Messages: 3
Outgoing Messages: 3
Communications Trace: 3
Error Messages: 3
Driver Data: 3

Advanced Options:
 Explode Coded Entries for this Connection
 Include in Specimen Management
Default userid: [Text Box]
 Update Specimen Management on Status Messages
 Overwrite Patient Data
 Include in Specimen Storage and Retrieval
Shared Orders DB Connection: [Dropdown]
Device Timezone: - None -
Device:
 NULL COM
 TCP/IP
Character Encoding: - None -
Buttons: Device Parameters..., Close

Support for Windows Server 2019



- New version of Cache deployed with IM 2020 (Cache 2018)
- Will include support for Server 2019

End of Support for “Hard” Keys

- USB hard key that was installed on some customer systems
- Older systems used this licensing method; has been replaced with the software security activation code
- Very rare to see it these days; primarily on much older systems that are overdue for an upgrade



IM Version Calculator



- <https://datainnovations.com/im-version-calculator>
- Use to compare your existing version of IM to newer versions of instrument Manager to see the features that have been added.

Upgrade to IM 2020 edition, version 8.17.20, today and get the most updated software for your lab

Every version of Instrument Manager includes new and updated features for our customers. Select your current version to see the list of new features you'll receive when you upgrade to the IM 2020 edition, version 8.17.20.

Select your current version of Instrument Manager

v8.12

Access these new features with your upgrade!

- ✓ Timezone Awareness
- ✓ Launch 3rd party apps within SM Workspace
- ✓ Calculator for 'N' from "Previous Results"
- ✓ High Availability
- ✓ Access to archive database via Lab Intelligence
- ✓ Laboratory Intelligence
- ✓ Auto-logout
- ✓ Moving Medians for Moving Averages
- ✓ QC Bracketing
- ✓ User auto-provisioning with LDAP
- ✓ Load new licenses without IM restart
- ✓ Enhanced Moving Averages Desktop
- ✓ Enhanced Disaster Recovery
- ✓ Simplified traceability
- ✓ Open QC framework
- ✓ "Filter by" pane in SM Workspace
- ✓ Dynamic Filters
- ✓ Re-authentication
- ✓ Transformed algorithms for Moving Averages
- ✓ Mean Bracketing for Moving Averages

Thank you!



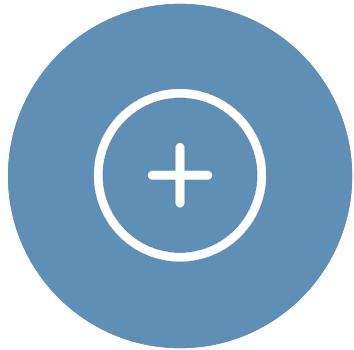
Data Innovations Upgrade Program

Streamline and Simplify Your Upgrade
Miranda Spears & Matt Taylor

Topics

- I. Why Upgrade?
- II. Upgrade Process
- III. Customer Guidance
- IV. What's Included?
- V. Customer Success

Why Upgrade?



New Features



Mirroring
support



Operating
Systems Support



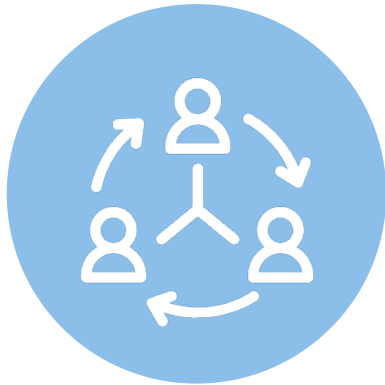
Driver Support

Customer Guidance

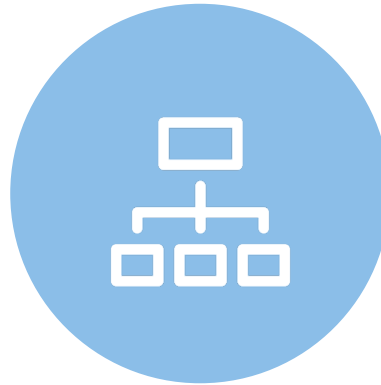


- Structured Process
- Application Optimization
- Assist with coordination and preparation
- Timeline Management

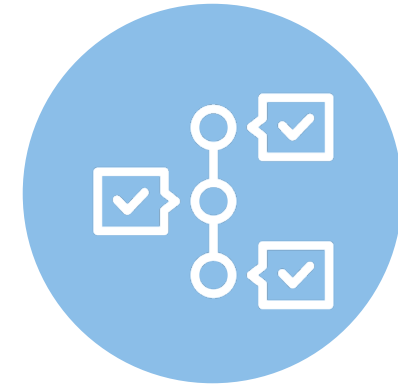
What it takes to have a successful upgrade?



Team Collaboration



Project Organization



Project Timeline

Success: Team Collaboration



Data Innovations Resources

- Laboratory Solutions Project Manager
- Laboratory Solutions Technical Consultant

Client Resources

- Primary Point-of-Contact
- IM Analyst
- IT/Network Resource
- LIS Analyst
- Laboratory Resource

Success: Project Organization



Pre-Build

- Timeline
- Client dependencies
- Server requirements
- Network requirements



Build

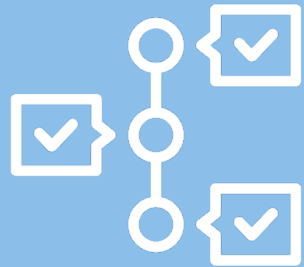
- Test Server
- Production server
- Mirror
- Validation



Activate

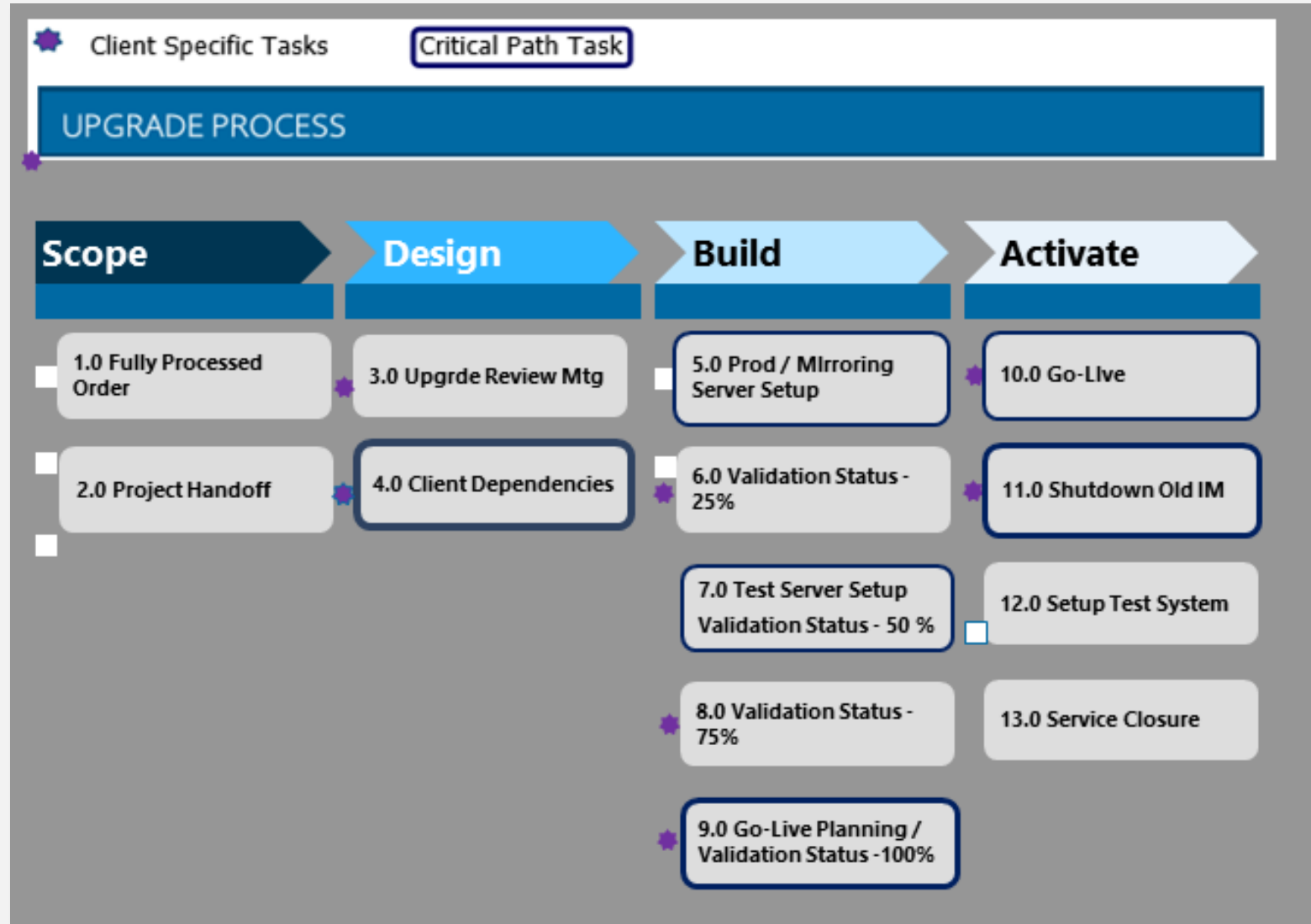
- Go-Live checks
- Go-Live
- Post Go-Live Check in

Success: Project Timeline



UPGRADE PHASES	ESTIMATED COMPLETION TIMEFRAME
Scope Phase: Fully Executed Order	Prior to Client Discovery
Scope Phase: Project Management	Client Discovery / Prep Document submitted to client within two (2) weeks of the Fully Executed Order
Scope Phase: Upgrade Kick-Off / Technical Review	Within one (1) week of initial client contact
Scope Phase: Client Dependencies	Client Discovery / Prep Documentation * Within one (2) week of Upgrade Kick-Off / Technical Review.
Design Phase: Upgrade Meetings Scheduled	Within one (1) week of completion of the Upgrade Dependencies
Design Phase: Upgrade Readiness Meeting	Requested after delivery of Upgrade Schedule
Design Phase: Pre-Installation Server Requirements	Just prior to the Build Phase: Test Server Setup
Build Phase: Production / Mirroring Server Setup	One (1) week after Upgrade Readiness Mtg
Build Phase: Client Validation Status [50%]	Two (2) weeks after Upgrade Readiness Mtg
Build Phase: Test Server Setup	Two (2) weeks after Upgrade Readiness Mtg
Build Phase: Go-Live Planning [Validation 100%]	Three (3) weeks after Upgrade Readiness Mtg
Activate Phase: Go-Live	Four (4) weeks after Upgrade Readiness Mtg
Activate Phase: Closure / Transition to Support	Five (5) weeks after Kick-Off

Upgrade Process



Included in Your Upgrade

Instrument
Manager
Installation

Troubleshooting
Assistance

Configuration of
High Availability
and/or Disaster
Recovery

Migration of
Databases

Dedicated
Remote Go-Live
Support

Questions



Thank you!