

# Setting up, connecting and reconnecting to an Omnis Database

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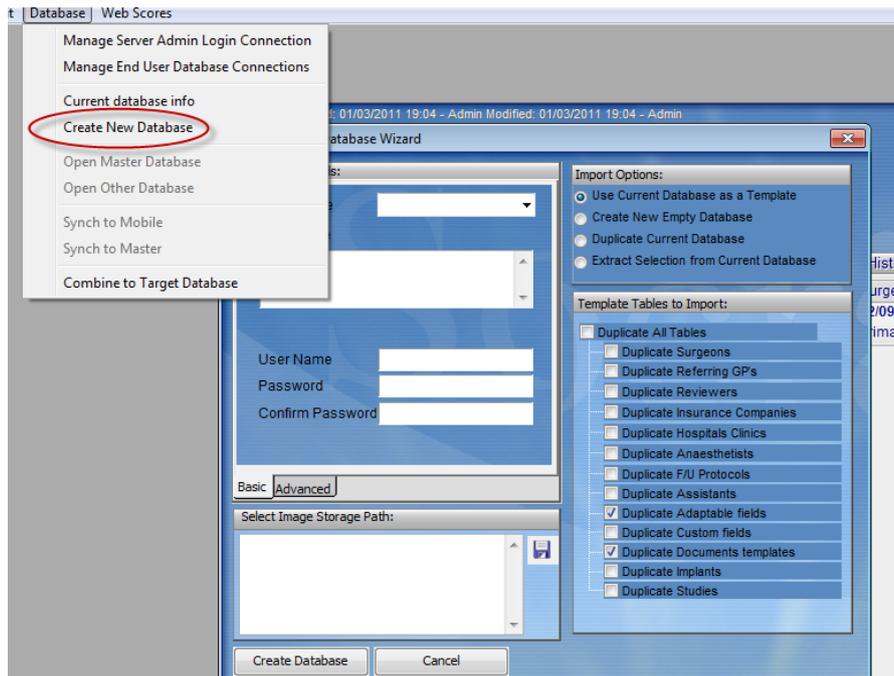
The Omnis database is included with the installation of the program. There is no need to download anything external.

Once you have registered your program, log into Socrates using **Admin** as the user name, and **Admin** as the password. You will then need to create your own new database.



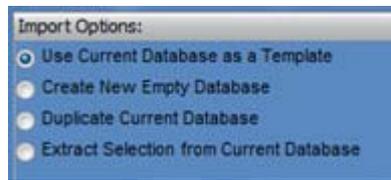
## CREATING YOUR OWN NEW DATABASE

You now need to create you new database. Don't enter any patients into the demo database. Go to the tool bar at the top and select create new Database. This window will appear.

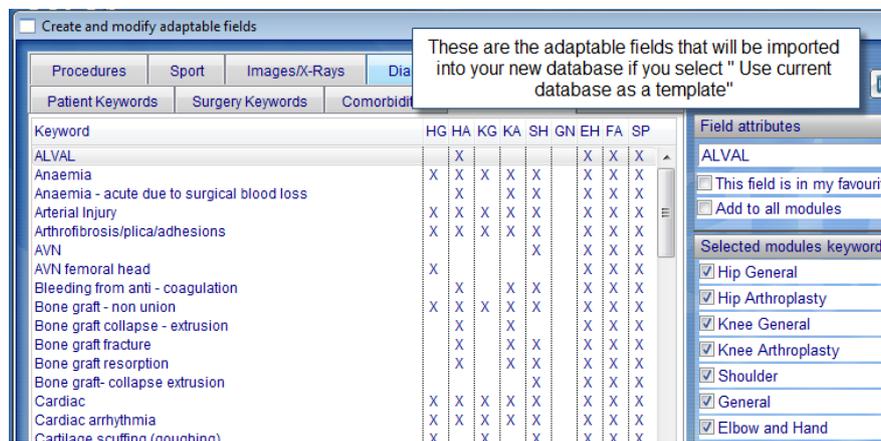


## Import options

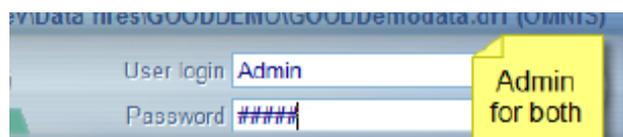
If you are logged into an existing database all the options are possible. If you are not logged in to another data base only creating a new empty database is available as an option, as the other options involve copying something from an existing database which can't be done if you are not logged into one.



Use current Database as a Template is recommended when you are first setting up your new database. It will transfer the default lists of adaptable fields which we recommend (diagnosis, complications, procedure names, comorbidities etc) from the demo database. To do this you should now be logged into this demo database and are on the Home screen which is the Socrates skeleton.



You can always delete and modify these later. Log in to the demo file using Admin as the user name, and Admin as the password.

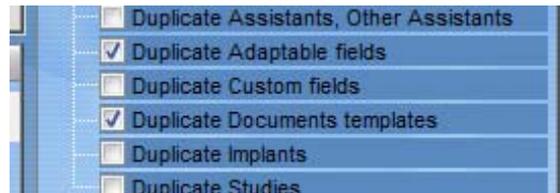


You are now logged into the demo and on the Home screen - where the skeleton is with all the icons for patients, statistics etc. Follow the steps described below

## Use Current Database as a template and Create new Database

Choose either of these options if you are a new user creating your own new database. Both of these will create a new file empty of any patients and surgery records. If you have decided to keep the default lists of adaptable fields as we recommend select *Use current database as a template*. If you choose *Create a new empty database* these will all be empty. Note that it is only available as an option if you are currently logged into an existing Socrates database, in the case of new users this would be the demo database.

If you choose option 1 you will notice that only Duplicate adaptable fields and document templates are selected.



You wouldn't normally choose to keep any of the other populated fields for your new database from this demo file as they are fictitious (surgeon names, hospitals, studies etc). These are normally only checked if you want to create a new database for another user in the same institution based on your own database, when you would want to use the same surgeon names, studies etc.

### **Duplicate Current Database**

(Only available if you are currently logged into an existing Socrates database).

This option will create a new database that is an exact replica of the database you are currently logged in to. This can be useful for transitioning between different database server types or copying your file.

### **Extract Selection from Current Database**

(Only available if you are currently logged into an existing Socrates database).

This option will import data from all of the Template fields in your current database and will import some or all of the Patient / Surgery / Follow Up data depending on the options that you choose.

An Extract Section will appear on the screen with several options to choose from.

You may choose to:

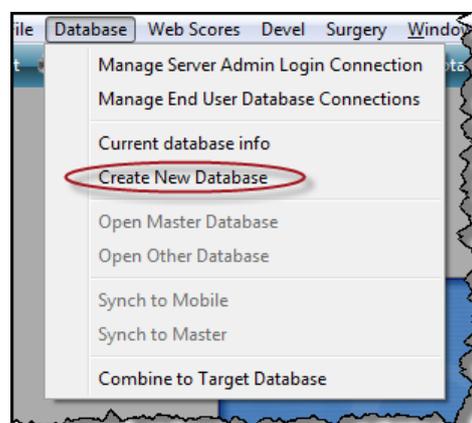
- Click the Extract Selection button to choose a selection of data to extract.
- Copy Images or not.
- Anonymise Patient Key Identifiers

See chapter on Set Up for more details about this function.

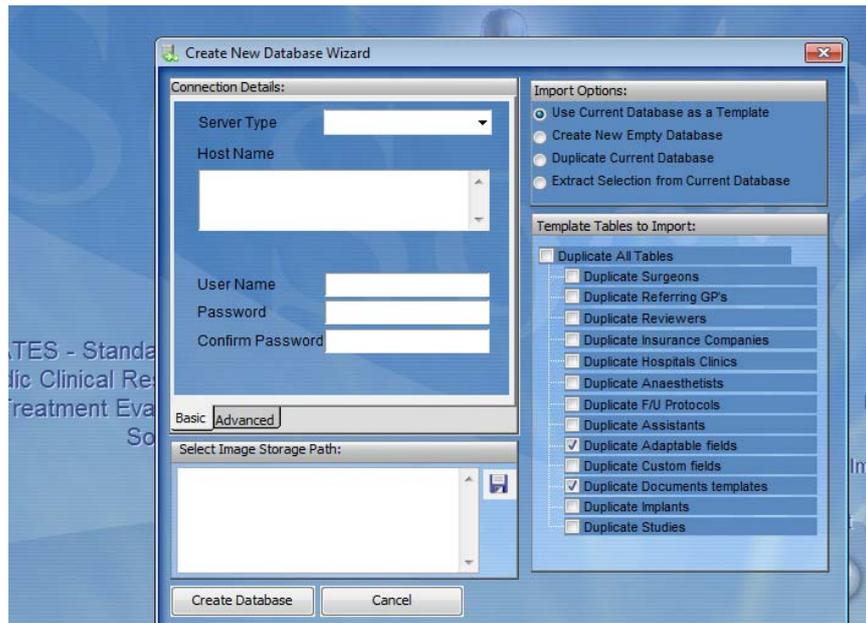
## **Creating your new database.**

So, let's get started. You are logged into the demo database file and on the [Home](#) screen - where the skeleton is with all the icons for patients, statistics etc. Follow the steps described below - you can also go to [Page 6](#) which has a screen print of what you need to do step by step.

- ➔ Go to the Database drop-down menu on the top left and select *Create New database*.

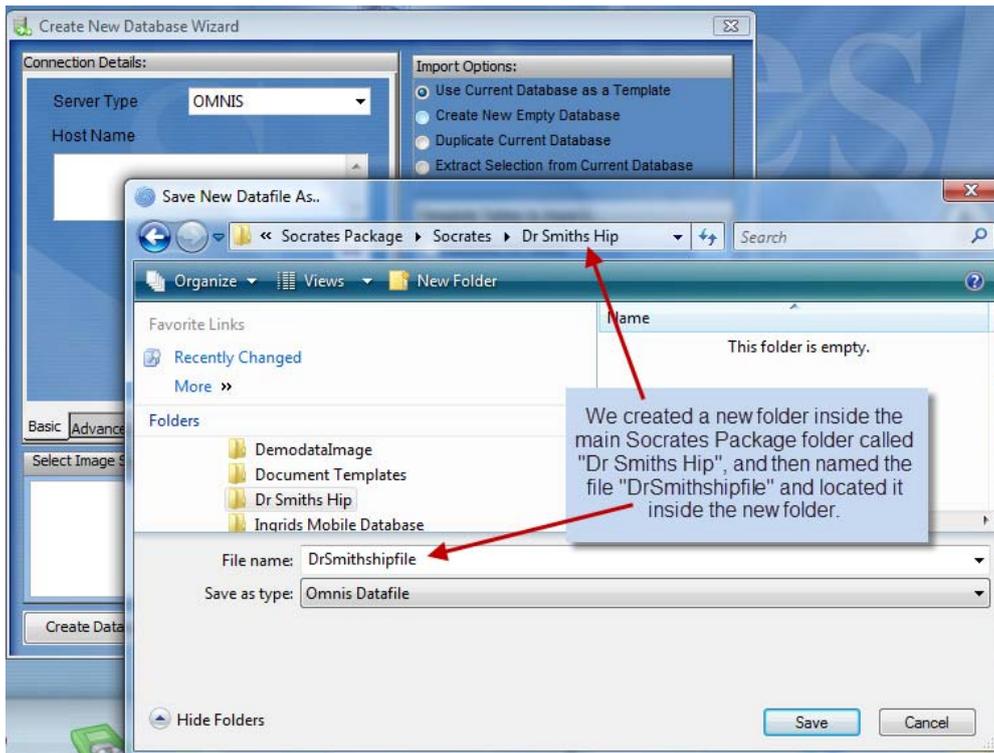


- ➔ This window will appear.



- Choose Omnis as the **Server type** and select “use Current database as a template”. Leave the Duplicate Adaptable fields and Templates boxes checked. If you are not logged into the demo database file or the file you want to copy or use as a template, this will be greyed out. You can't reproduce or copy anything from an existing database that you are not logged into. If this is the case click cancel, then log in to the database with 'admin', 'Admin' and start again.
- You now need to name your database and choose a location for it. Select the **browse disk** icon and browse to wherever you want to store your database. If you are installing Socrates on a standalone machine this would normally be in a folder on your C Drive, or in My Documents, the choice is yours. If you are planning to access the database from other computers or install it on a LAN you would normally store the database file on a server, or a machine which can be accessed by the other computers via a shared drive. Note that we don't recommend that Omnis databases be stored on a Novell network. In the File Name field type in the name you choose.

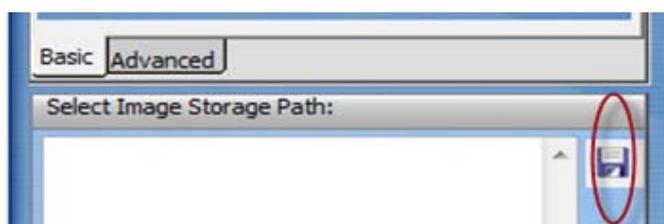
Pick something simple and meaningful which identifies you, and avoid using numbers and characters (&@#! etc). Examples are StElswhereknee, DrSmithhip, UWSDHip. You can mix upper and lower case. Below we made a new Folder called Dr Smiths Socrates and opened into this folder. We have named our file “DrSmithshipfile”. Click OK to save the database. Once we have finished creating the file this is where it will be stored.



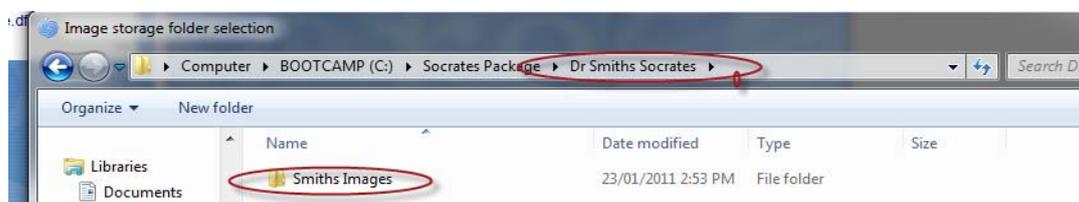
The file name and location will now be displayed in the Host Name window.



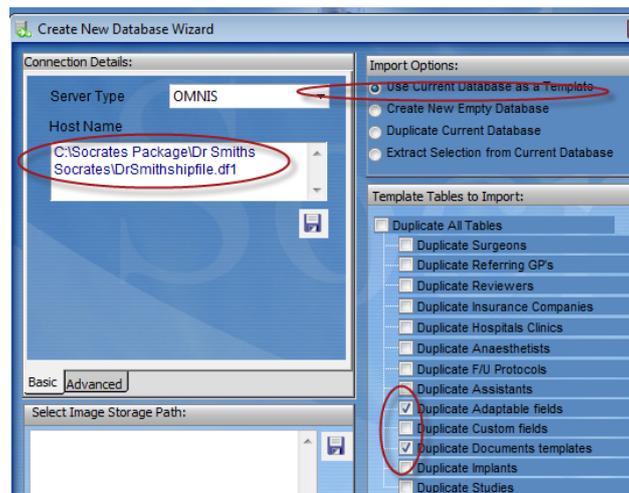
- Now you need to create a folder and path to store your X-rays, videos and electronic documents. Even if you don't think you will use this feature it isn't a bad idea to set it up as if you change your mind later you don't have to revisit these instructions. You can always move the folder – see more in X-ray Images chapter. Click on the **browse disk** icon in the Select Image storage path window and browse to a location and folder (or create a new folder) to store the files.



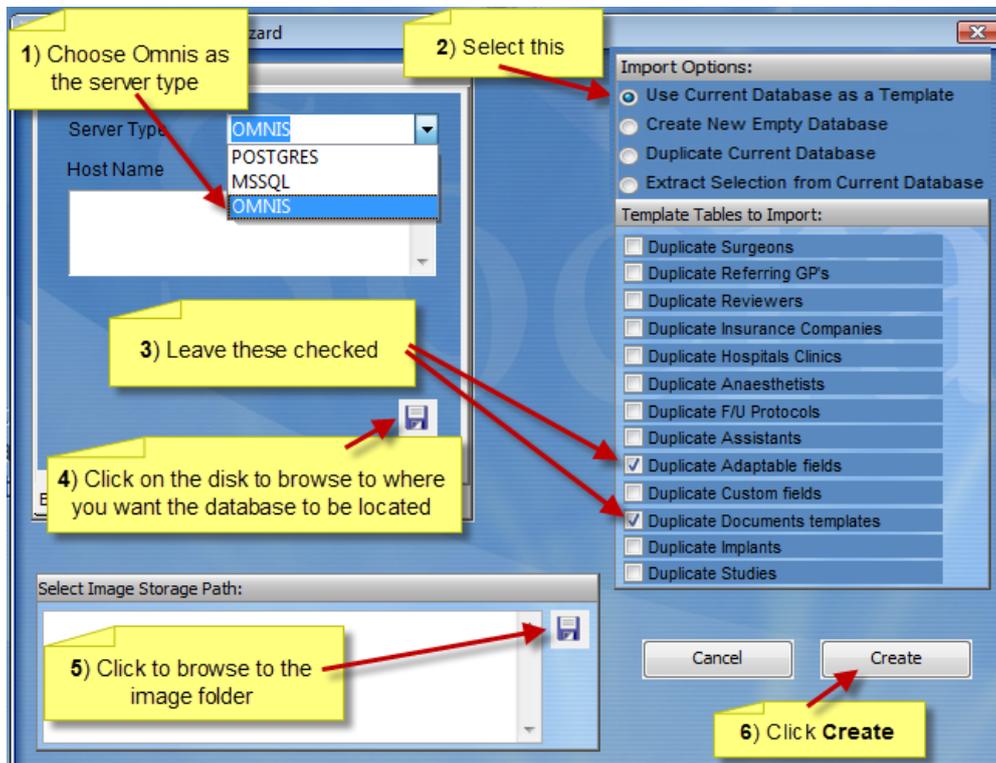
- Below we **created a new folder called 'Smiths images'** inside the Dr Smiths Hip folder. Double click or save into the chosen folder and the images will be stored in that location. It doesn't have to be in the same folder as the database, it can be on an external drive, server, or anywhere you choose. If you choose a location outside your computer you will only be able to view the thumbnails if you are not connected to the external drive.



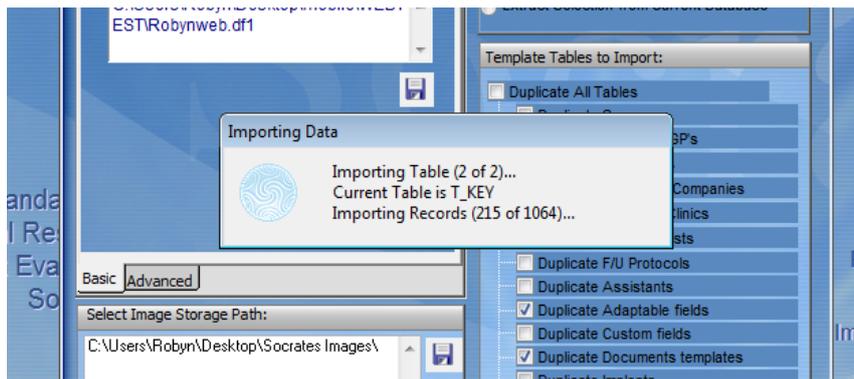
- You should now see the Host Name window displaying your file name and location, and the image storage path doing the same.



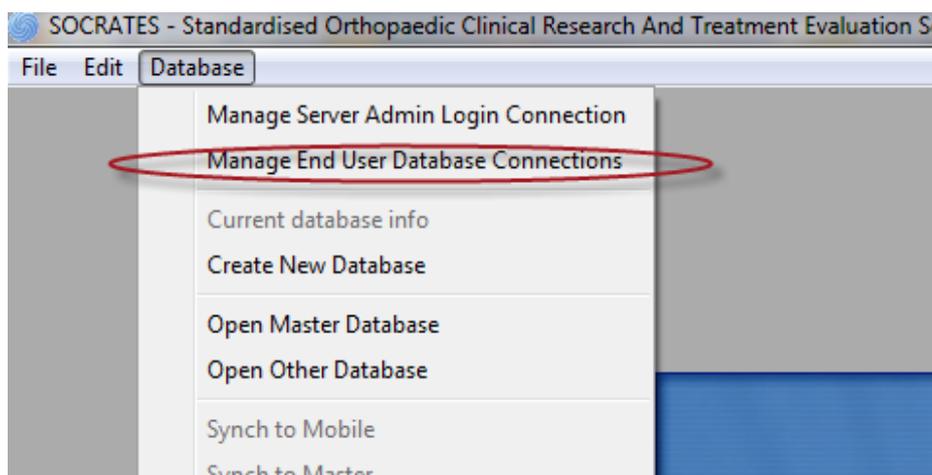
- Use the screen shot below as a check list, check that both paths are displayed in the windows.



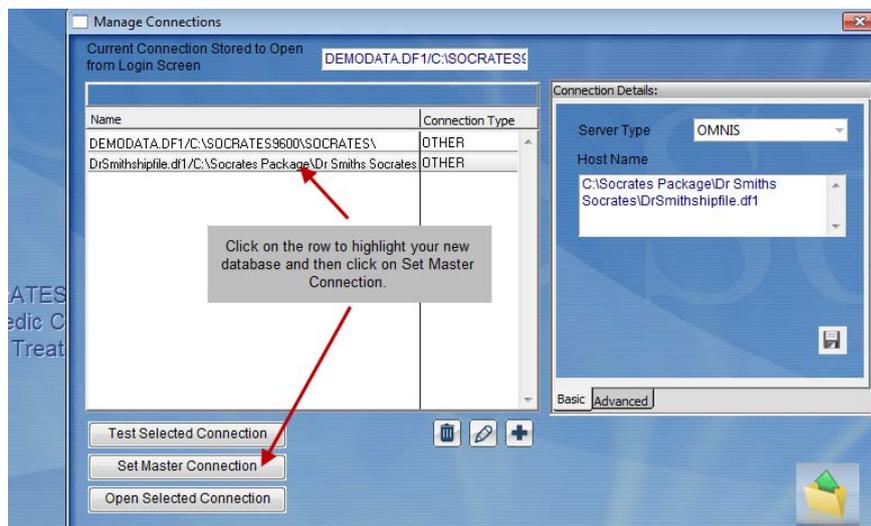
Now click on the **Create** icon. It will take a couple of minutes for the new database to be created and you'll see this small message window as it goes through the process.



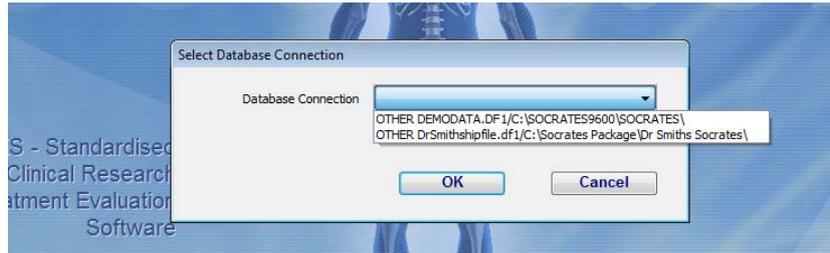
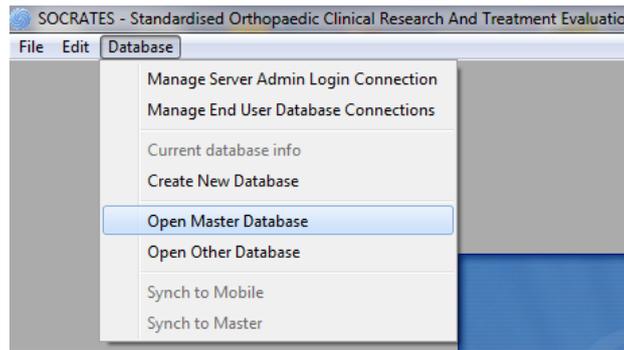
- Now go back to the **Database** drop-down menu → *Manage End User Database connections.*



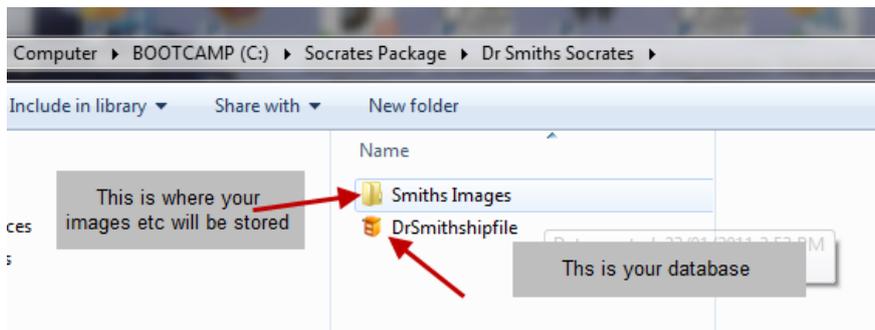
- Highlight the file with the name of your new database then click on *Set Master Connection*. This sets your database as the Master; if you are ever logging into other databases you can always return easily to this database, as the program “remembers” where it is.



- You've now created a new Omnis database, you just have to log into it as you are still logged into the demo database at this stage. To open into it you can highlight it, then click on Open selected Connection. At this stage you user name and password is admin and admin to log into your new empty file.
- You can also connect by clicking the Back (**yellow folder**) icon, then go to the **Database drop-down menu** on the top left side of the screen, and if you selected it as your master database select “**Open Master Database**” and you will be ready to log into your new database. Or you can use the “Open Other Database” if you haven't named it as your master, the list of all available databases will be displayed.



- The default password and user name of 'admin' and 'admin' will log you in but you should now set up your own user names and passwords. Go to the chapter on **Set Up** now to get you underway.
- If you went to Windows Explorer and viewed the folder where you located your database and image folders you will see that they are now listed there. The database is the one with the orange icon. Don't try to open it, you can't access it without logging into Socrates first.

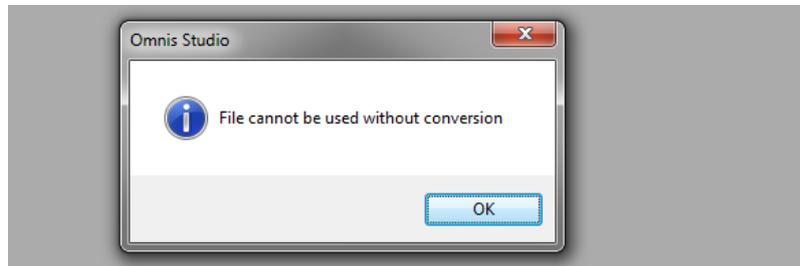


#### A summary -

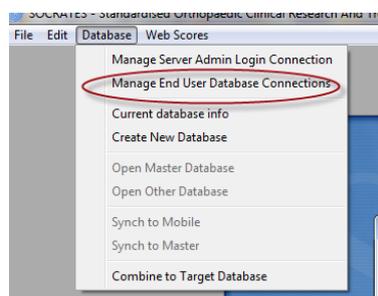
- ➔ Log into the demo database
- ➔ Go to the file menu and select Create new Database
- ➔ Create the connection
- ➔ Browse to name and select the location of the database and Image folder
- ➔ Create the database
- ➔ Select this as the Master database
- ➔ Log out of the demo database
- ➔ Go to Database → Open Master Database
- ➔ Login to the new database

## Connecting or reconnecting to an existing Omnis database file

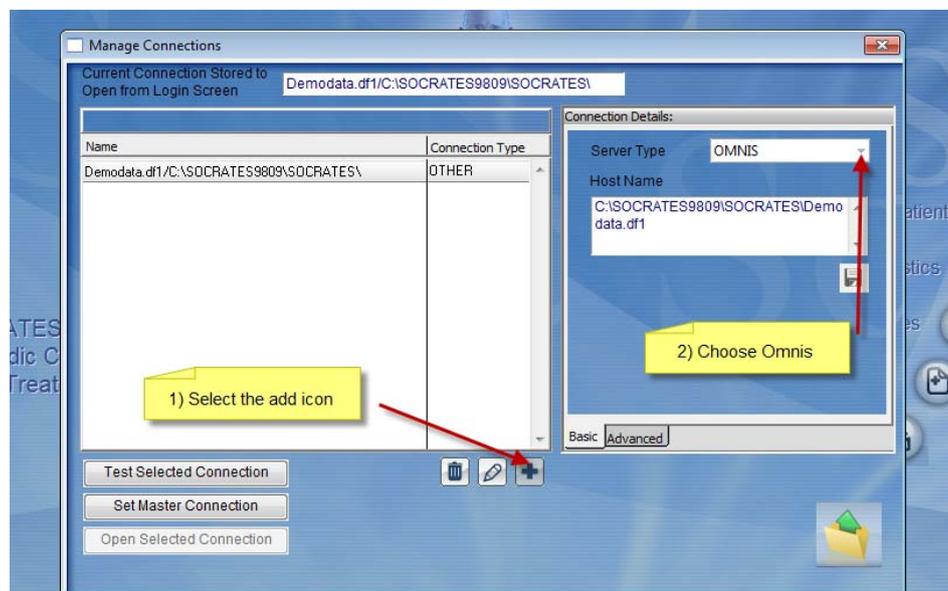
In order to be able to open into your database from a new or other computer, or to connect to a file which might have been sent to you, you have to know where it is located, and what it is called. Remember that even if you can see the Omnis file (the little orange filing cabinet) it won't open unless you are opening it from inside Socrates. If you double click, or use *file open* directly into one of these files you will get this message.



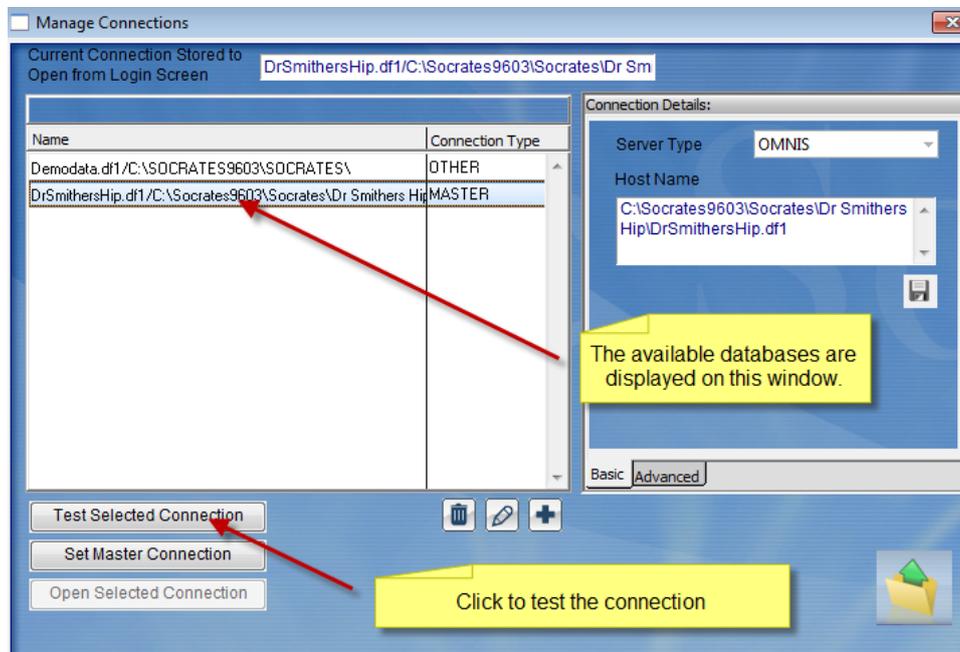
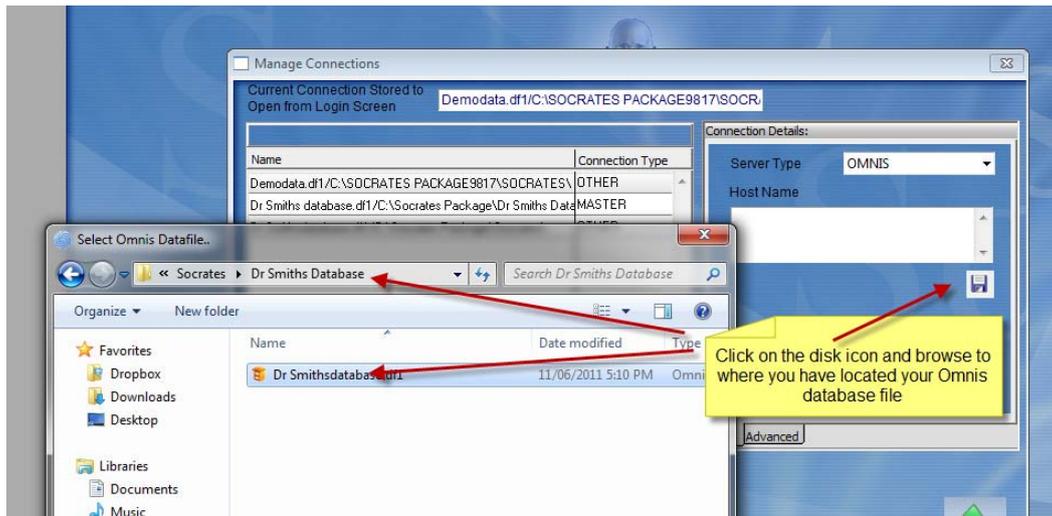
- Copy the Omnis database file to wherever you want to locate it, or know its existing location
- Start Socrates and before you log in to the demo or existing file go to **Manage End User Database connections** on the file menu on the top left hand corner of the screen. You are going to add the file, and establish a connection to it before you can log into it.



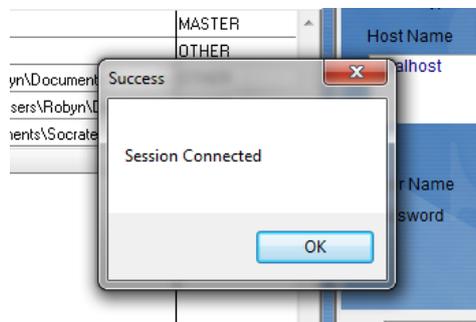
- Select the Add icon, choose Omnis as the Server type.



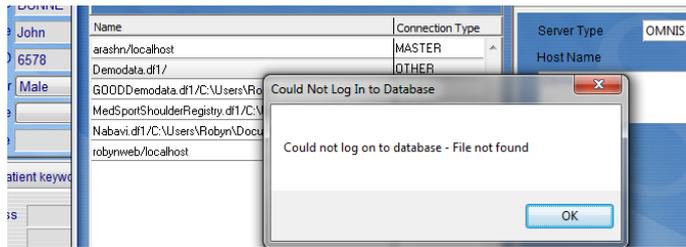
- Click on the disk icon and browse where you have located your existing database file. Select it, and then double click or Open. The name and path of the file will then appear in the left column with any other databases you have a connection to also listed here. The demo file and any other files which may be set will also show up here.



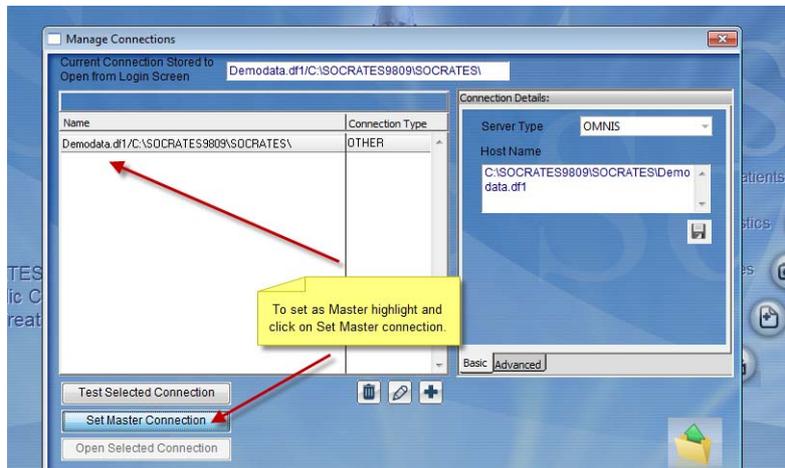
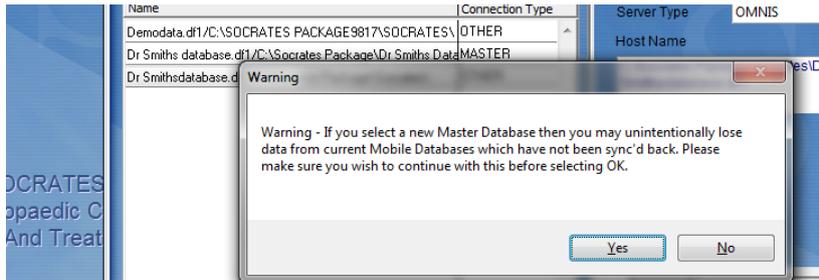
If the connection is successful when you click on test you will see this message.



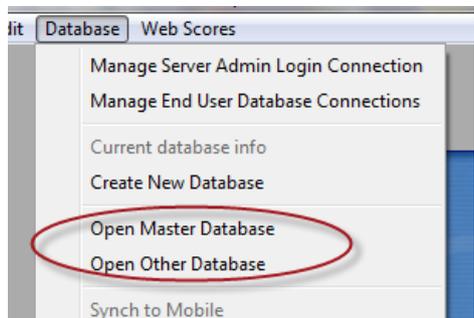
If it can't find the file or it can't connect for any other reason you will see this message.



If this is to be the Master database file highlight it and select Set Master connection. If you do this you may see a warning message, if you are set up with master and mobile files it is warning you to make sure that all data from your mobile files are synced back before you change the master file.



Once you have made the successful connection you can then open into the file. To do this go back to the file menu, and select either "Open master Database" if you made this file the master, or else select "Open other database". If you selected open other database all available databases will be listed. Choose the one you want then log in with the Socrates password for that database.



**Note** - you can only access these 2 options if you are **not** logged into an existing database. Go back a screen if these options are greyed out.

## BACKING UP YOUR FILES

There are several different ways to back up your files. If you have an automatic backup system or your IT department back up your files for you just make sure it includes your Socrates program and data. If so, you don't have to do anything special. If not there are a couple of ways you can back up.

The important files to back up are the database file, and the image folder.

### How to find your files:

To back up Socrates yourself, or to tell your IT person where the data you need to back up is, you need to know where the files you want to back up are located. The patient data resides in a data file, and the documents, X-rays and videos in a folder. To find out where it is, go to the Home Screen and click on the Info button at the bottom of the screen. It will display as below. This is an example of a default data file setup. If you had the program set up to synch between a mobile and master file the names and location of these would also display in the window. Or use the right click function on the Socrates short cut then find the location of the folder and open into it.

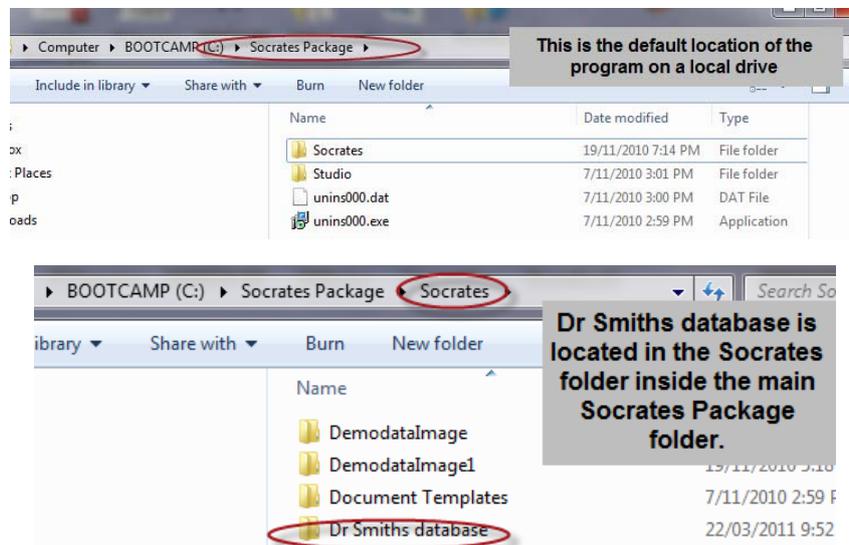
### How to back up your files

If you are using an IT support person give them a copy of this and they will be able to locate your files and set up a backup system for you.

Note: you can't copy files if you are logged into your Socrates program.

If you are doing it yourself there are 2 ways to do it, you can back up the whole program or just your database file and image folder. The program can always be reinstalled and then reopened into the backed up database and image folder. You will need a new registration code if you have reinstalled the program.

Check the info screen to find out the location of your database and image folder. These are both in a file/folder format and can be backed manually by just a simple copy and paste function. Or better still ask your IT person to set up an automatic back up to these files.



If your database is on a server they are usually backed by the IT department but it's a good idea to check that they are, and that the backup actually works. In general if you are unsure about how to back up, we recommend that you get some professional help. It's well worth spending some time and money at the start to ensure you are properly backed up.

## RELOCATING YOUR IMAGE FOLDER

If you have a new computer and have a folder with X-rays or videos from your previous computer this needs to be moved to a new location also. Just use the copy and paste function and copy the whole folder to the new location. You will now need to re-establish a path to this folder from your new database or you won't be able to open any of the images. Even if your folder is in its original location on the server for example, you still have to "tell" the new or relocated database where the image folder is.

Start Socrates and log in, then on the set up screen select Image and X-ray storage.



Then click on Change Image Storage folder, and browse to the folder where you images are located. You will now be able to import and store images in your new or relocated database.

