



HemaTrax®

SOFTWARE INSTALLATION GUIDE



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Date: NOVEMBER 2013

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Considerations & Actions Prior To Installation

Considerations and Actions Prior To Installation

Note: The person installing the software must be logged on to the target Windows computer as the administrator before attempting to install. This software has been tested and validated with the 32 or 64 bit versions of Windows, including Windows 7, Windows 2008 Server R2, Windows 2012 Server R2 operating systems.

If the HemaTrax Print Server service application **is not** installed on the system that you are currently preparing to install on, then you may skip to the next section of this installation guide (HemaTrax Software Installation). If, however, a previous release is currently installed on the system then proceed with the balance of this section.

Uninstall Existing HemaTrax Print Server

The installation procedure will not allow two copies of the print server to co-exist on one system at the same time.

Note: It may be possible to circumvent this restriction by using virtual system software which allows multiple operating system environments to co-exist on one hardware platform. This guide, however, does not focus on the use of virtual operating environments.

Attempting to install more than one copy of the HemaTrax Software (Print Server) on a system will cause an error dialog to be displayed and the installation process to be aborted. It is necessary to uninstall any preexisting copy of the HemaTrax Print Server service application from a system before proceeding with the installation of the new HemaTrax software release.

Uninstalling HemaTrax Software

To uninstall an existing copy of the HemaTrax Software you must use the "Uninstall" utility which is located in the Microsoft Windows "Control Panel". **DO NOT attempt to manually delete the HemaTrax application directories and files.** You must use the Window's "Uninstall" utility to remove the HemaTrax application. Please refer to Microsoft's Help system to assist you with the proper procedure for uninstalling an existing application.

Note: Uninstalling the HemaTrax Print Server or even the HemaTrax Standalone application is not destructive to any HemaTrax files that are created specific to the facility. This includes user IDs & passwords, additions and changes to the product label database, facility names/locations/registration numbers, generic label designs, etc. Do not manually delete these residual files and directories from the previous release unless you specifically intend to bypass HemaTrax file migration.

If the system on which you are about to install the HemaTrax software has a copy of the previous release of the HemaTrax Print Server running on it, **uninstall the HemaTrax Print Server software now.**



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Note: If you have a previous copy of the HemaTrax Print Server still installed on your system, you must uninstall it before proceeding with this section of the HemaTrax Software Installation Guide. See the previous section of this guide for more information.

Installing From CD-ROM

If the HemaTrax installation software has been supplied to you on a CD-ROM, then place that disk into the CD-ROM drive now and close the drawer. Proceed to the portion of this guide entitled "Installation Window Displayed".

Installing From Downloaded File

If you are installing from a file downloaded from the Life-cycle Software Support (LSS) area of the Digi-Trax WEB site then follow the procedure given immediately below

The Windows operating system has the ability to extract from .ZIP archive files. By right-clicking the archive file that has been downloaded from the Digi-Trax WEB site you will be given the opportunity to "Extract" the files from the archive. You should create a new folder into which the archive file will be extracted.

Using the Windows Explorer file management application, navigate to the newly created folder where the extracted files now reside. Right click on the "setup.exe" file in that folder and then select the "**run as the administrator**" option you are given.

Note: If you are not given the option to run the application as an administrator then you will likely not be able to install the software as HemaTrax requires administrative authority to be installed.

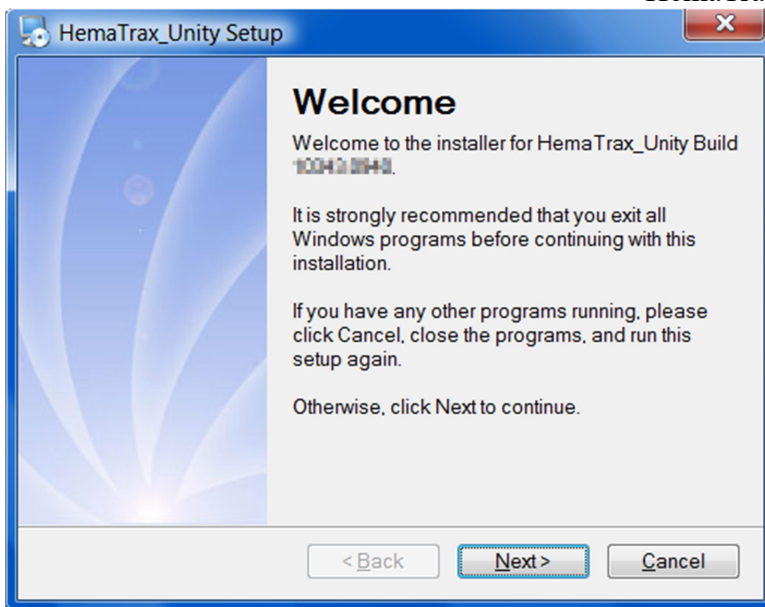
Installation Window Displayed

Shortly after the CD-ROM has been inserted or the "setup.exe" file has been run the following window should be displayed.



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HemaTrax Software Installation Welcome Window

The Welcome Window

The first window displayed when the installation software is executed is the "Welcome" window. At this window the operator will be able to see the build number associated with the software to be installed. *In the window shown above this build number has been intentionally blurred.*

It is recommended that you close other programs before continuing with the installation process. In the past some programs have caused problems with a clean installation of the software.

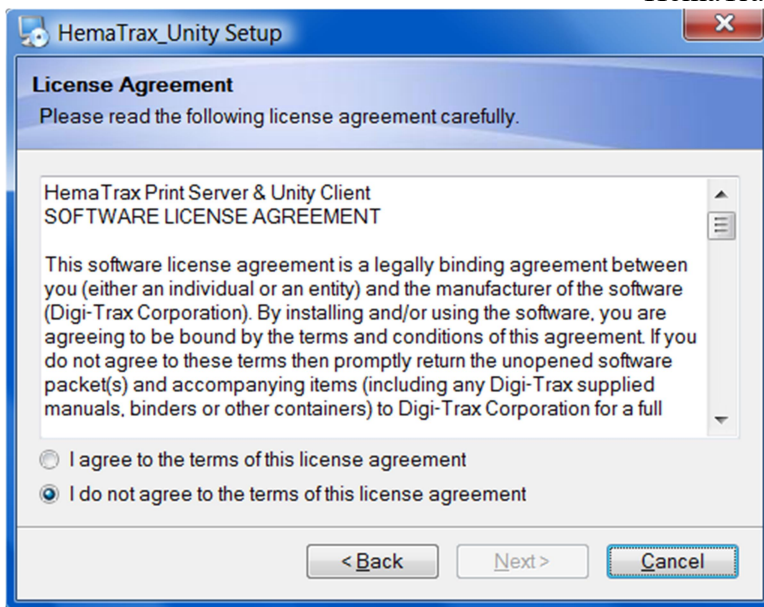
To proceed with the installation process you can either tap the "Enter" button on the keyboard or use the mouse pointer and click on the "Next" button displayed at the bottom of the window. To stop the installation process the user would either click on the "Cancel" button at the bottom of the window or click on the "X" button in the upper right corner of the window with the mouse.

After the "Next" button is clicked or the "Enter" key on the keyboard has been pressed the following window will be displayed.



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HemaTrax License Agreement

The License Agreement

The "License Agreement" window displays the first portion of the HemaTrax Print Server and HemaTrax Client Software License. The user is advised to take the time to read the agreement. The vertical scroll bar located at the right side of the window allows the user to scroll down and up through the agreement text. The full text of the license agreement is provided for your convenience at the end of this document.

If the user does not wish to continue with the installation then the user may click on the "Cancel" button or click on the "X" button in the upper right portion of the window.

By clicking on the "Back" button the previous window (The Welcome window) will be displayed.

In order to proceed with installation the user must click the radio button labeled "I agree to the terms of this license agreement." Once this button has been selected the "Next" button will be enabled. To proceed with the installation process the user must click on the "Next" button.



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After clicking on the "Next" button of the "Software Configuration" window, the "User Information" window below will be displayed.

The screenshot shows a standard Windows-style dialog box titled "HemaTrax_Unity Setup". The window has a blue header bar. Below the header, the text "User Information" is displayed in bold, followed by the instruction "Enter your user information and click Next to continue." There are two text input fields: one labeled "Name:" and one labeled "Company:". At the bottom of the window, there are three buttons: "< Back", "Next >", and "Cancel".

User Information Window

User Information Window

The "Name" field is the only required entry in the "User Information" window. As long as the entry is not left blank it will be possible to continue to the next window. After completing the "Name" field continue to the next window by clicking on the "Next" button.

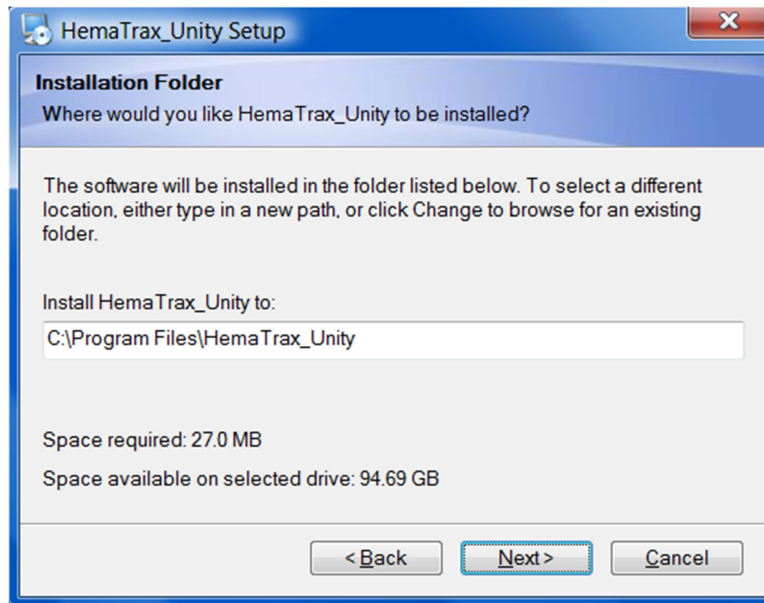
Clicking on the "Back" button will take you to the previous window.

After completing the "Name" field and clicking on the "Next" button the following "Installation Folder" window will be displayed.



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Installation Folder Window

The "Installation Folder" window does not require or accept any input and serves only to indicate to the user where the HemaTrax Print Server service application program will be stored, how much space will be required and how much space is available on the target disk drive.

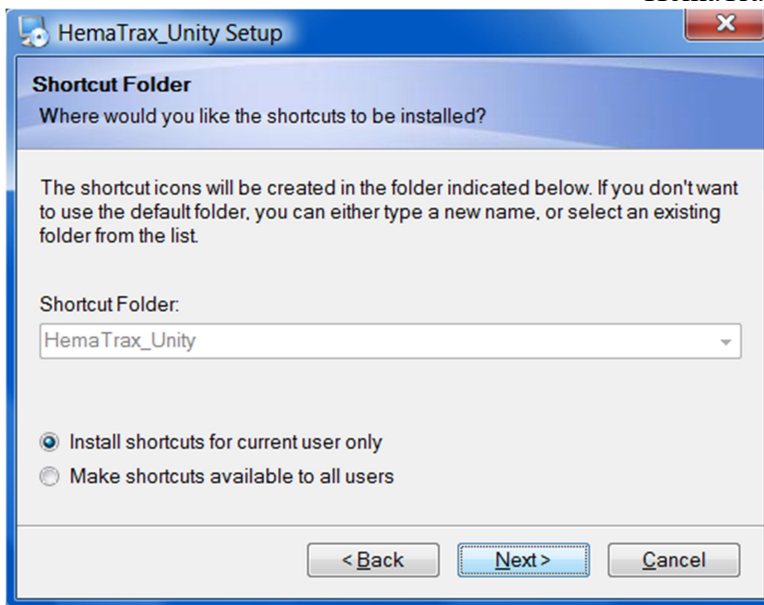
After reviewing the displayed information click on the "Next" button to proceed to the "Shortcut Folder" window.

Clicking on the "Back" button will take you to the previous window.



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Shortcut Folder Window

Shortcut Folder Window

The "Shortcut Folder" window displays the folder name where the shortcuts will be installed. The user may not change the name of the shortcut folder. Two mutually exclusive radio buttons allow the user to determine if only one user or all users will be provided the shortcut. It is important that if more than one user is using the system to change the selection to "Make shortcuts available to all users" by clicking on the appropriate radio button. The default selection is "Install shortcuts for current user only."

After making the appropriate radio button the user may move to the next window by clicking on the "Next" button.

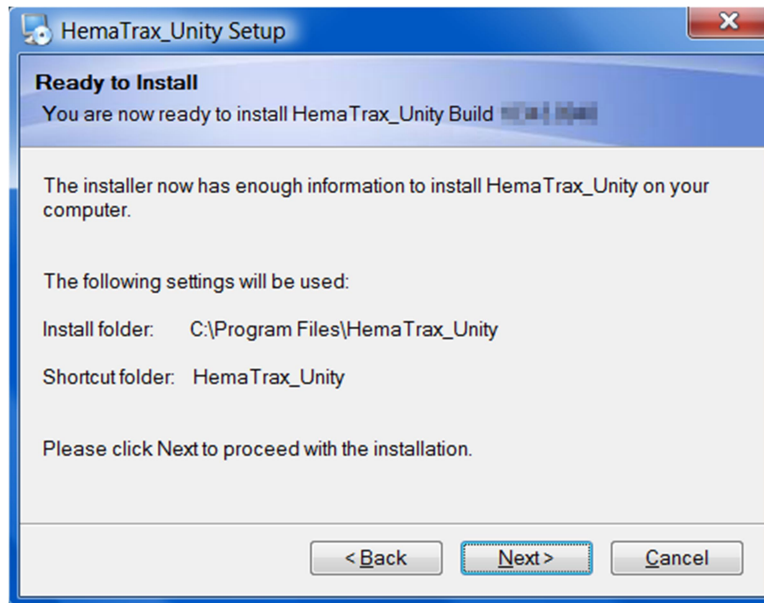
Clicking on the "Back" button will take you to the previous window.

After clicking on the "Next" button the following "Ready to Install" window will be displayed.



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Ready to Install Window

Ready to Install Window

When the "Ready to Install" window is displayed this is the notification that the installation wizard has collected sufficient information to start the installation process. This window displays the build number of the HemaTrax software to be installed. This window also shows the install folder and shortcut folder names

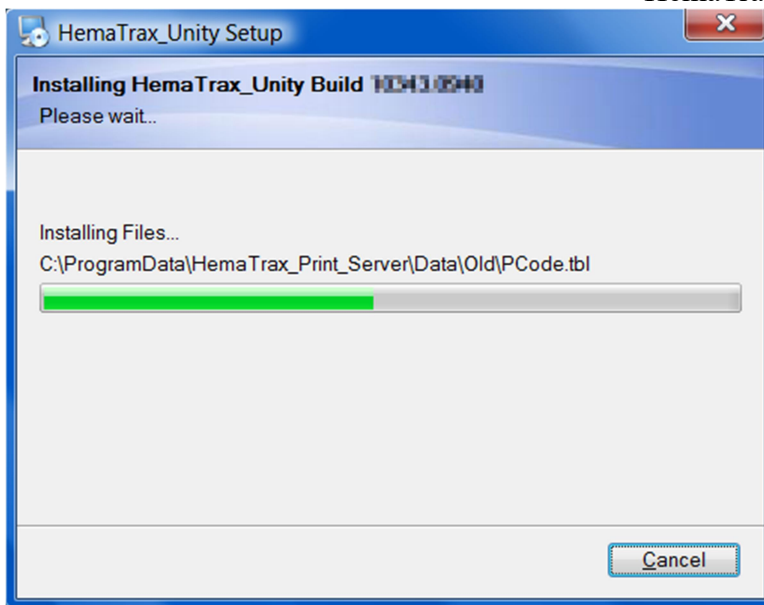
Clicking on the "Back" button will take you to the previous window. Clicking on the 'cancel' button will abort the installation process.

If the "Next" button is clicked the installation process will begin and the "Installing HemaTrax Unity Build..." window that follows will be displayed.



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Installation Progress Window

Installing the HemaTrax Software

The "Installing HemaTrax Unity Build..." window displays the names of the files that are being extracted from the installation wizard's internal archives and copied to the designated target folders. This process goes very quickly with file names being installed flashing by rapidly and the progress bar filling from left to right. Typically this phase of the installation will complete within ten seconds.

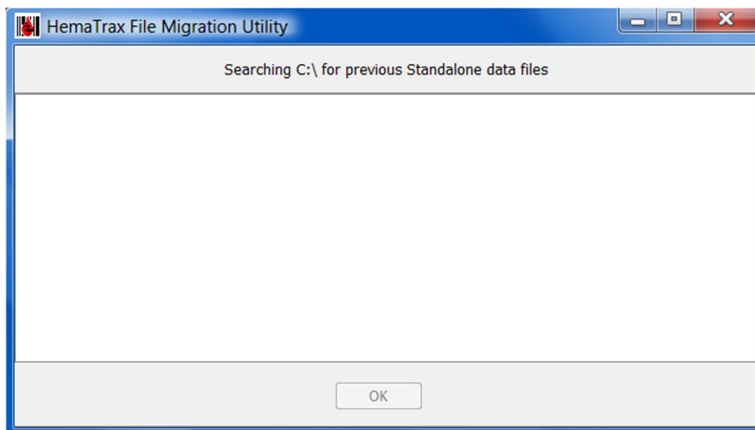
There is a "Cancel" button in the lower right corner of the window which, when clicked, will allow the installation to be canceled. Since this installation phase goes so quickly it is doubtful that the user will have sufficient time to make use of the button.

When the progress bar has been filled the file extract and copy portion of the installation will complete and the installation will turn control over to the file migration utility.



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Searching for Previous Installed Files window

File Migration Utility

The window shown above will appear to indicate that the file migration utility is scanning the system drive for the presence of residual files from a previously installed HemaTrax Print Server or a current or previous HemaTrax Standalone installation. This scanning process can take a minute or two to complete. If the scan determines that there are one or more directories that appear to be left from installations of either of the mentioned HemaTrax software products, then the user will be asked whether or not the files from one of possibly several directories are to be migrated to the data directory of the new print server.

If no files from an existing or previous installation of the HemaTrax Standalone application or no residual files from a previous HemaTrax Print Server installation are found then the File Migration process will end automatically. If the File Migration process ends automatically then proceed to page 19, “HemaTrax TCP/IP Print Server Settings”.

One of the two possible dialog messages requesting this is shown in the illustration below:



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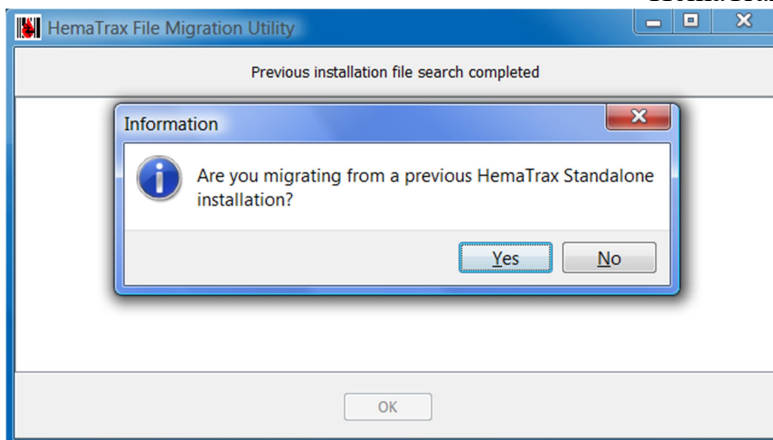


Illustration of "Are you migrating from a previous HemaTrax installation?" dialog

"Are you migrating from..." Dialogs

Depending on the files identified one or two dialog boxes may appear that request a user decision in order to proceed with the file migration. The illustration above shows the "Are you migrating from a previous HemaTrax Standalone installation?" dialog. The other one is the "Are you migrating from a previous HemaTrax Print Server installation?" dialog.

Important Note: *If you are upgrading from a previous **HemaTrax Unity** installation, you do not want to perform any file migration and should answer "No" to any migration questions.*

If the user sees the "Are you migrating from a previous HemaTrax Standalone installation?" dialog and clicks on the "Yes" button then even if there potentially were also files from a previous HemaTrax Print Server installation, only the directories for the previous Standalone installations will be considered for the migration process. If the user answers "No" to the "Are you migrating from a previous HemaTrax Standalone installation?" dialog or if there were no HemaTrax Standalone files found and there were HemaTrax Print Server files found, then the user will see the "Are you migrating from a previous HemaTrax Print Server installation?" dialog. If the user answers yes to the "Are you migrating from a previous HemaTrax Print Server installation?" dialog then only those directories where those files were found will be considered for the file migration process.

If the user clicks on the "No" button for each of the possible dialogs then no file migration will be performed and the next step of the installation process may be found on page 19, "HemaTrax TCP/IP Print Server Settings".

In the illustration shown below the user had been asked the "Are you migrating from a previous HemaTrax Print Server installation?" dialog and responded by clicking the "Yes" button.



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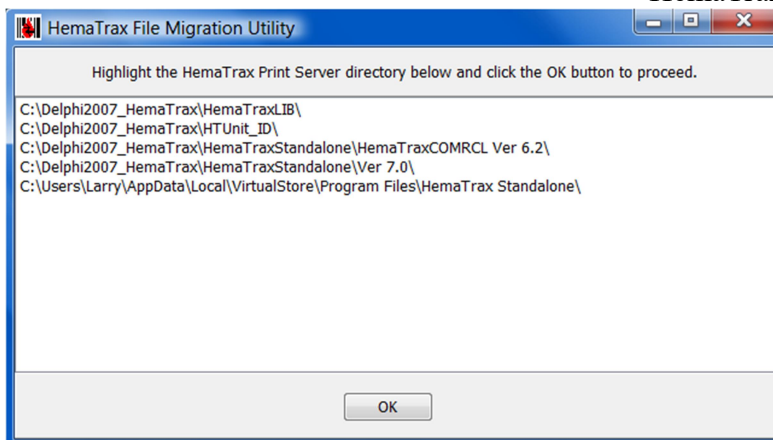


Illustration of migration source directory selection window

Migration Source Directory Selection Window

When more than one directory has been discovered to have files that match what might be in a HemaTrax software application directory then a window, as shown in the illustration above, will be displayed. If there is only one directory found then no choice needs to be made.

In the illustration above, five directories were determined to have files that would be found in a HemaTrax Print Server application's data directory. The user must select which directory is to be used as the source of files for the migration process. The selection is made by clicking on one of the directory path lines and then clicking on the "OK" button located at the bottom of the window.

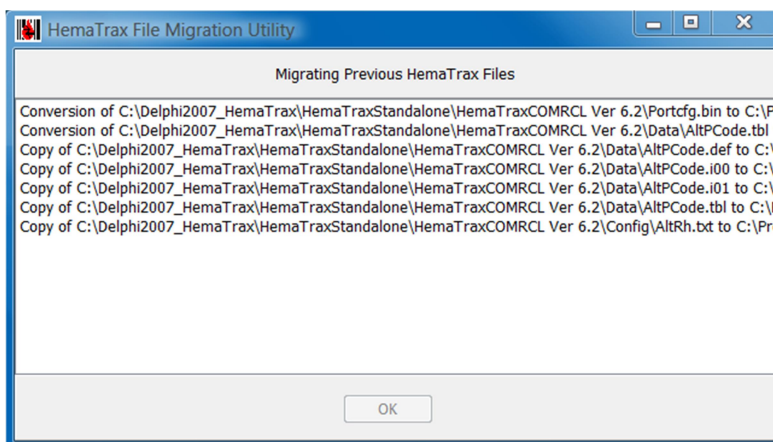


Illustration of file migration process window

File Migration Process

The window in the illustration above shows the list produced as the file migration process moves along. The action being taken "Copy of" or "Conversion of" starts each line. The source file path and file name is then listed on each line and finally the target file path and file name is listed on each line. Each line is terminated with one of the following action status words: "skipped", "completed", "failed" or in some cases where an expected source file doesn't exist the status phrase "file missing" may appear in



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place of the target path and file name.

Target File Already Exists Dialog

It may be possible that a migrated file already exists in the target folder. This could happen if a user has uninstalled the HemaTrax software and is then installing again on the same machine. When the file migration program discovers a file that already exists in one of the target folders it will display the dialog box shown below and wait for the user to make a decision before continuing.

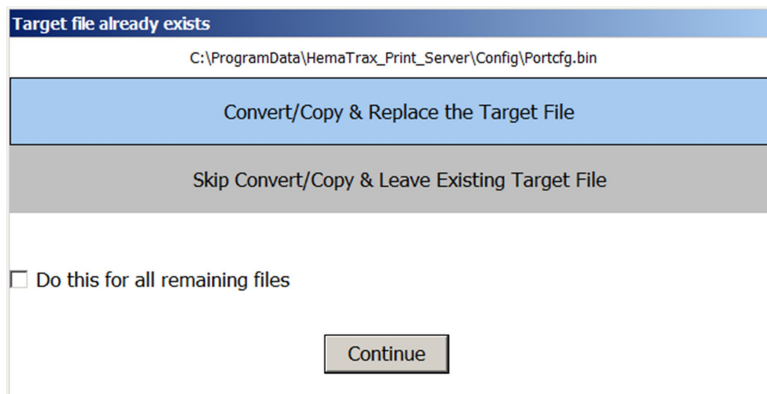


Illustration of “Target file already exists” dialog box

The title line in the top margin of the dialog box states “Target file already exists”. Below the title line and centered in the top panel is the path and name of the file that already exists. Below the path and file name panel there are two panels displayed. The first panel contains the legend “Convert/Copy & Replace the Target File.” and the panel below it contains the legend “Skip Convert/Copy & Leave Existing Target File.”. The panel with the selected action will have a blue background color and be inside of a thin black bordering line. The deselected panel will have a gray background color and have no border line around it.

Choosing the Action

The user determines which action they wish to take for the indicated file by placing the mouse cursor over the appropriate panel and then clicking on it.

Do For All Files Decision

Below the action selection panels described above there is a check box labeled “Do this for all remaining files”. If the user checks this box then the action described in the selected panel above will automatically be taken for the remaining balance of target files discovered by the migration program. If the check box is not checked then each time an existing target file is discovered the dialog box will be redisplayed and await a user decision.

Continuing the Migration

After the user has made the appropriate selections the migration process is then continued by clicking on the button labeled “Continue” located at the bottom center of the dialog box.

What To Do?



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If you are re-installing the new HemaTrax Client/Server software and you DO NOT wish to keep any file changes or additions that you made after you had installed “Unity” then leave the default “Convert/Copy & Replace the Target File” panel selected and check the check box labeled “Do this for all remaining files.” and then click on the “Continue” button.

If you are re-installing the new HemaTrax Client/Server software and you want to keep all of the file additions and changes that you made after you had installed the new release then you will probably want to select the panel labeled “Skip Convert/Copy & Leave Existing Target File” and check the check box labeled “Do this for all remaining files.” and then click on the “Continue” button.

If you know what you are doing and desire to pick which files to convert and or copy and which ones to skip over then you'll select the appropriate panels and check box when prompted by the dialog.

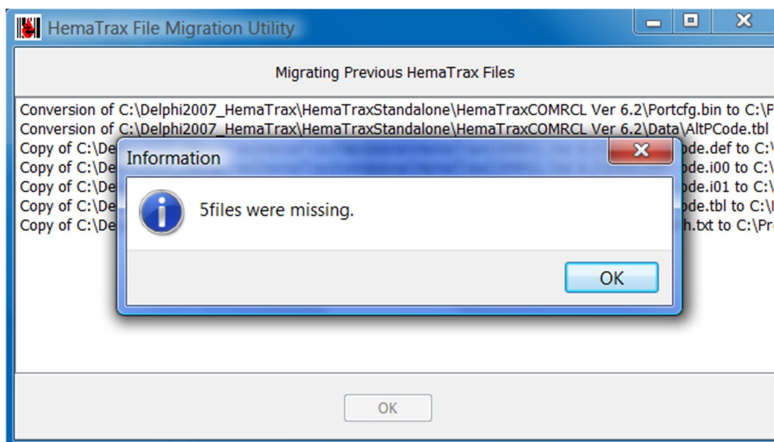


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File Migration Problems Dialog

At the end of the file migration process, if any problems were encountered, a dialog box will be displayed that summarizes the issues encountered. The user may continue on by clicking the "OK" button in the dialog window.



Dialog indicating that a number of files were missing

File Migration Completion

At the end of file migration a dialog box is displayed as shown in the illustration below. To move on the user clicks on the "OK" button displayed in the lower right of the dialog box.

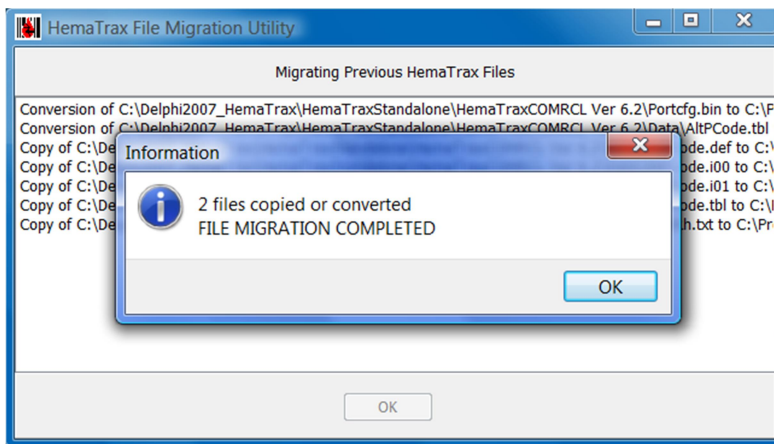


Illustration of file migration completion dialog

After clicking the "OK" button in the migration completion dialog box shown above, the file migration process will turn control back over to the installation wizard to complete the remaining actions of the installation process.

HemaTrax Print Server Settings

The HemaTrax Print Server Settings window is displayed to show the current settings that will be used by the print server when it is started at the end of the installation process. If the Print Server Settings



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application is executed from the main menu after the installation process, the user will be required to enter a valid HemaTrax Print Server administrator's user ID and password. Only during initial installation will the ID and password not be initially required. An illustration of the HemaTrax Print Server Settings window is shown below:

HemaTrax Print Server Settings Window

In the paragraphs that follow each of the controls located in the Print Server Settings windows is described in detail.



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Listening Port Number

Located in the **TCP/IP Setting** panel, the "listening port number" establishes the port on which the print server listens for connection requests from client applications. This port number in combination with the IP address of the print server is required by each client in order to establish a connection to the print server. It is important to select a listening port number which will not interfere with other "well-known" port numbers used by other services running on the machine hosting the print server service application. When assigning a port number for the HemaTrax Print Server it is best to choose a number in the range (5001 – 10000). The HemaTrax Print Server defaults to a listening port address of **5500** automatically if one is not specifically assigned.

Add "Autologous Donor" as valid donor type on the full face label

Located in the **Print Server Controls** panel, the "Add AUTOLOGOUS DONOR as valid donor type on the full face label" check box is used to determine whether or not the text "AUTOLOGOUS DONOR" may be used as a valid donor type on the full face label. When checked the print server is directed to print "AUTOLOGOUS DONOR" on the full face label instead of the generally accepted "VOLUNTEER DONOR" text when the appropriate autologous intended use/donation type has been selected. This feature has been provided for those customers that have previously applied for this labeling variance with the FDA.

FDA is the label compliance authority

Located in the **Print Server Controls** panel, the '**FDA is the label compliance authority.**' check box, when checked, directs the print server to include certain FDA/U.S. Consensus Standard label text adopted specifically for labeling blood in the United States. For example the text located under the right side of the product bar code that indicates the intended use or donation type will be included.

Do not print Registration Numbers

Located in the **Print Server Controls** panel, the "**Do not print Registration Numbers**" check box, when checked, inhibits the printing of the facility registration number line even when the "**FDA is the label compliance authority**" check box has been checked. This control allows users outside of the United States to use much of the U.S. Consensus Standard label formatting specification, without printing the specific FDA registration number line in quadrants one and four of the full face label.

Do not print License Numbers

Located in the **Print Server Controls** panel, the "**Do not print License Numbers**" check box, when checked, inhibits the printing of the facility license number line even when the "**FDA is the label compliance authority**" check box has been checked. This control allows users outside of the United States to use much of the U.S. Consensus Standard label formatting specification, without printing the specific FDA license number line in quadrants one and four of the full face label.

Do not print "Rx only" line

Located in the **Print Server Controls** panel, the "**Do not print "Rx only" line**" check box, when checked, inhibits the printing of the "Rx only" located beneath the "See circular..." lines in the quadrant one label for transfusion products even when the "**FDA is the label compliance authority**" check box



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has been checked. This control allows users outside of the United States to use much of the U.S. Consensus Standard label formatting specification, without printing the specific FDA required "Rx only" line in quadrant one of the full face label.

Located in the **Print Server Controls** panel, the '**Use the U.S. Date & Time bar code format.**' check box, when checked, directs the print server is directed to use the U.S. Consensus Standard specification for formatting the bar code and text of the collection date and expiration date on the date and time label quadrant in place of the ICCBBA ISBT-128 standard date only specification.

Expiration Dates that have Expired

Located in the **Print Server Controls** panel, the '**Do NOT allow printing of expiration dates on labels that have already expired**' check box, when checked, prohibits the print server from the printing of ISBT-128 Date & Time quadrant labels that carry dates that have already expired (based on the current server system date).

Alternative Rh Factor Text

The **Alternative Rh Factor Text** panel contains a check box and two text entries. This panel allows the operator to specify whether or not alternative text for Rh Negative and Rh Positive units will be used below the blood type printed in the ABO-Rh label quadrant.

"Use alternative text for Rhesus factor text..." Check Box

The "**Use alternative text for Rhesus factor text on the ABO-Rh labels**" check box is normally not checked. When not checked the standard ABO Rh factor text will be used on all ABO-Rh labels as shown in the table below:

Rhesus Factor	U.S. Rhesus Factor Text
Negative	Rh NEGATIVE
Positive	Rh POSITIVE

When the check box is checked then the text entered in the two edit boxes below will be used on all ABO-Rh labels.

Rh Negative Line

With the "**Use alternative text for Rhesus factor text on the ABO-Rh labels**" check box. described above, checked, the text located in the "**Rh Negative Line**" edit box will be used on all ABO Rh Negative labels. The text will be printed on labels as white lettering on a black rectangular background. This entry is restricted to a maximum of twenty characters.

Rh Positive Line

With the "**Use alternative text for Rhesus factor text on the ABO-Rh labels**" check box, described



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above, checked, the text located in the "**Rh Positive Line**" edit box will be printed on all ABO Rh Positive labels. The text will be printed on labels as black lettering on a white background. This entry is restricted to a maximum of twenty characters.

Alternative Properly Identify Intended Recipient and See Circular Text

The **Alternative Properly Identify Intended Recipient Text** panel includes two control objects that are used to specify text that will be printed as an alternative to the standard FDA required text for products that are specifically for transfusion.

Use the text below in place of the intrinsic "Properly Identify..." and "See Circular" text

The "**Use the text below in place of the intrinsic "Properly Identify..." and "See Circular" text**" check box, when checked will use the alternative text lines entered in the memo box which is located immediately below this check box. With the check box unchecked any text appearing in the memo box will be disabled from printing and it won't be possible to change the text in the memo box.

The Alternative "Properly Identify..." and "See Circular.." Memo Box

This unlabeled memo box appears directly below the check box described immediately above and inside the "**Alternative Properly Identify Intended Recipient and See Circular Text**" panel. The user enters the alternative lines in this memo box. Each line entered will be a separate line appearing centered within the label quadrant. Do not use spaces to attempt to center lines, as that is done automatically by the print engine. While the memo box will accept more than five lines, the print engine will only use the first five lines entered. Do not type in more characters on a line than the memo field will hold. The memo box and character widths have been chosen to accept the proper number of characters per line that will fit properly in the quadrant label space (approx. 51 mm, 2 inches or 55 characters).

Maximum Time Periods

The **Maximum Time Periods** panel contains two entry fields that determine the maximum time that a user may remain inactive after signing onto the print server and the maximum period that may expire before the user must change their log on password. These settings only effect the HemaTrax production client application.

Idle time until disconnect

The "Idle time until disconnect" edit box allows the user to specify the period of time, in minutes, that may elapse with no user activity before the server no longer honors messages from that user. Entering a "0" (zero) indicates that there is no time limit. This setting only effects the HemaTrax production client application.

Change password every

The "Change password every" edit box provides the user with the ability to specify how many days a user's password will be honored by the print server, after which the user must specify a new password. If "0" (zero) is entered then there is no time period specified. This setting only effects the HemaTrax production client application.



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Save

For any changes to the settings to be retained the **S**ave button must be clicked. Failing to click the Save button will result in all changes being lost when the window is closed.

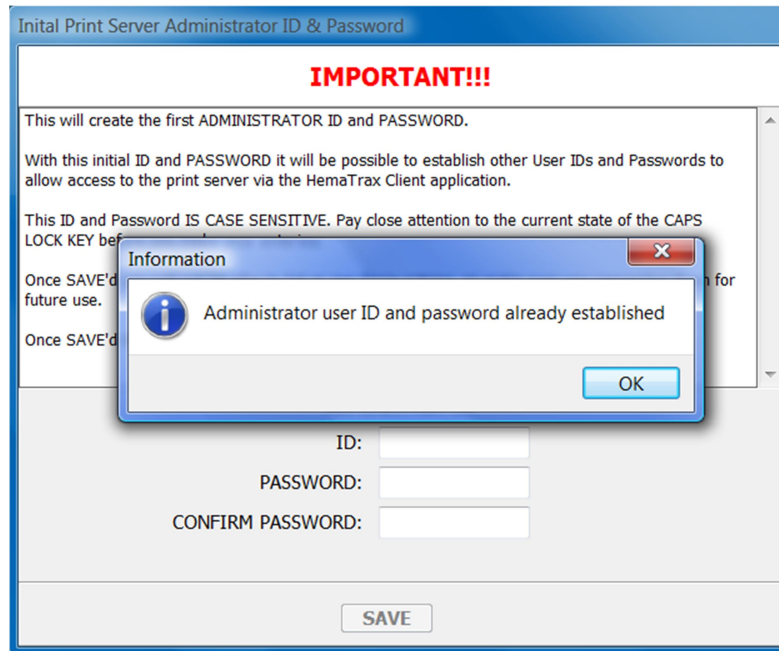


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Initial Print Server Administrator ID & Password

If you are installing on a system that had a previous copy of the print server or you've migrated a previous password file to the new installation you may see the window and overlaying dialog box as shown below:



Administrator user ID and password already established dialog

"Administrator user ID and password already established" Dialog Box

When the dialog box, as shown in the illustration immediately above, is displayed this indicates to the user performing the software installation that the administrator user ID and password of a previous installation is going to be used in this new installation. the user may proceed with the installation by clicking on the "OK" button in the dialog box.



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"Initial Print Server Administrator ID & Password" Window

The window shown immediately below is displayed when there is no password file with an administrator ID and password found.

"Initial Print Server Administrator ID & Password" Window

ID Edit Box

The edit box labeled "ID:" allows the user to type in an ID up to ten characters in length. This ID must uniquely identify the Administrator. The ID may not be less than four characters in length.

PASSWORD: Edit Box

The edit box labeled "PASSWORD:" allows the user to enter a password between four and ten characters long. This password is associated with the administrator's ID entered in the edit box above.

CONFIRM PASSWORD: Edit Box

The edit box labeled "CONFIRM PASSWORD:" allows the user to re-enter and thereby confirm the password that was entered in the edit box immediately above.

Use IDs and passwords that you will remember. There is no way to determine the passwords at a later time. ID's and passwords are stored in an encrypted format. The user IDs and passwords are now case sensitive.

"SAVE" Button

After completing the "ID", "PASSWORD" and "CONFIRM PASSWORD" entries the "SAVE" button is clicked to create the user ID/password file and then write the administrator's ID and password in that



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file. If any of the entries do not conform to the four to ten character range requirement then the user will be informed and must make the correction. After making the appropriate corrections the "SAVE" button is clicked again.

After clicking the "SAVE" button and if the entries made conform to the requirements the "Installation Successful" window shown immediately below should be displayed.



Installation Successful Window

Installation Successful

In order to complete (finish) the installation process click on the "Finish" button at the bottom of the screen.

Installation Problems

If you should encounter any problems with the installation and you purchased your HemaTrax software no longer than six months ago, you can obtain free telephone assistance from Digi-Trax Corporation by calling:

In Illinois: (847) 613-2100
Outside Illinois: (800) 356-6126

Software Support Resources

Life-cycle Software Support

After a period of six months from the purchase of your HemaTrax software you must subscribe to Life-cycle Software Support (LSS) from Digi-Trax Corporation. For one annual fee the LSS program



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HemaTrax Software Installation provides all HemaTrax users with ongoing free telephone support. the LSS program also provides WEB based software updates that may be downloaded from our secure LSS WEB page.

Software Support WEB Site

By following the link to the Digi-Trax web site given below you can navigate to our software support page. From that page you can get answers to frequently asked questions and you can view our videos to get assistance with installing and operating some of our applications.

<http://www.digi-trax.com>



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