JAZZ HARMONY

NameGrabber User Manual

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INTRODUCTION

Overview

NameGrabber™ is a bridging application located in the Windows System Tray that understands how to bridge patients from a Practice Management (PM) application to Harmony Imaging and other OEM versions. NameGrabber works with most third-party PM applications.

For example, if you have patient "John Doe" open in your PM application, and then click on the NG icon in the system tray, NameGrabber will automatically open that patient in Harmony Imaging. Using NameGrabber, the cumbersome and time-consuming practice of manually starting applications, finding a specific patient, and then opening that patient, is automated with a single click of the mouse.

Invoking NameGrabber

The NameGrabber application is invoked by single-clicking on the NG icon in the system tray with your left mouse button. Once this icon is clicked, NameGrabber will search for any open patients, and if found, NameGrabber will then open that patient in Harmony Imaging.

INITIAL SETUP

Overview

NameGrabber is installed automatically with any version of Harmony Imaging. Typically, this installation occurs on a central server, where the Harmony Imaging program is shared and run across the network from each workstation. After installation, simply browse to the Harmony Imaging share on the central server and launch NameGrabber.exe. This will place the NG icon in the system tray, indicating that the application is ready to use.

Start Automatically

When this option is enabled, NameGrabber will automatically be started when the computer starts. If this option is disabled, then the NameGrabber application will have to be manually started by the user when they want to use it.

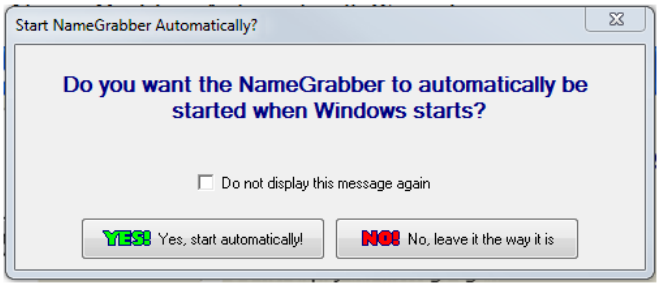
The first time the program is launched, users will be prompted to enable or disable this option.

To add NameGrabber to the Startup Group:

Browse to the Harmony Imaging share on the central server.

Double-click on **NameGrabber.exe**

The 'Start NameGrabber Automatically?' window appears



To ensure that NameGrabber starts automatically, click **Yes, Start Automatically!**

NameGrabber will now start automatically each time Windows starts.

This option can also be accessed by right-clicking on the NameGrabber icon in the system tray, selecting **Options** and then enabling or disabling the **Start automatically when Windows starts** option.

Updating NameGrabber

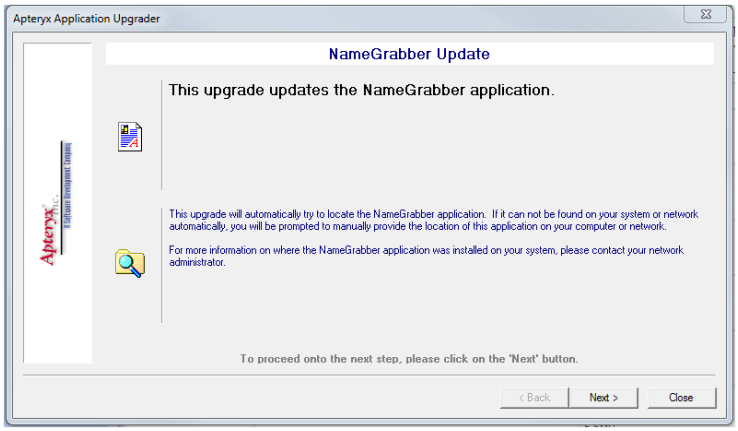
To update NameGrabber, close every instance of NameGrabber on the workstations.

To close NameGrabber, right-click on the icon in the system tray and select **Exit**.

Access the Harmony Product Updates Site.

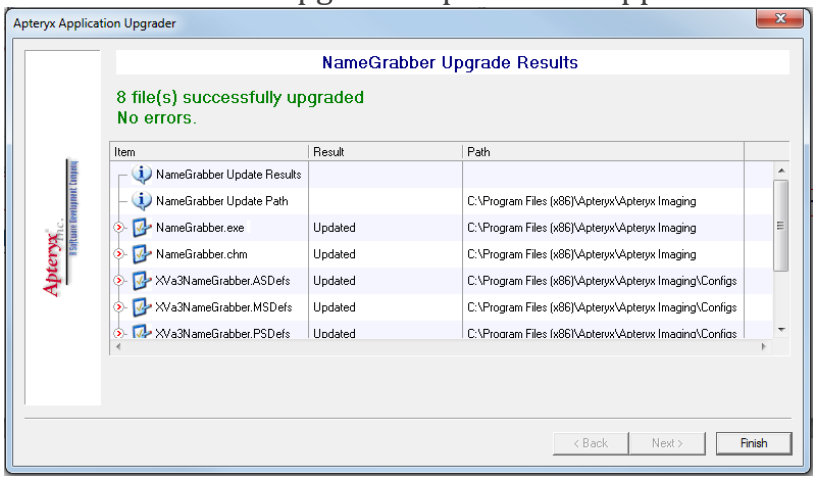
Expand the 'NameGrabber and DataDrills' section and click on the link to download the upgrader for NameGrabber.

Run the NameGrabber upgrader. The application updater wizard displays. Click **Next**.



If NameGrabber is still running, a warning message will appear indicating that the application MUST be closed before the upgrader can be run.

The NameGrabber upgrader updates the application and the associated files.

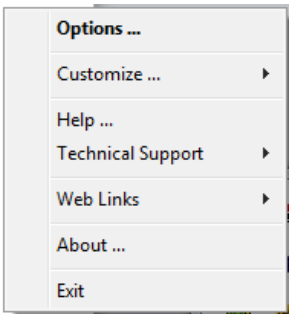


Click **Finish.**

PREFERENCES

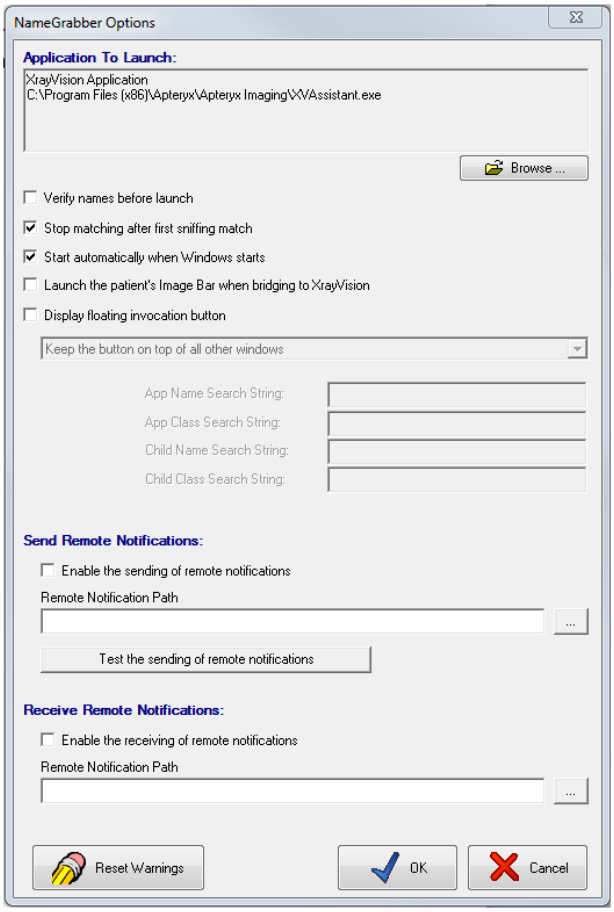
Overview

The NameGrabber menu can be accessed by right-clicking on the NameGrabber icon located in the system tray. The NameGrabber menu, seen below, provides several tools and utilities that allow users to manually launch patients, manage launched applications, edit application sniffer definitions, as well as modify NameGrabber invocation settings.



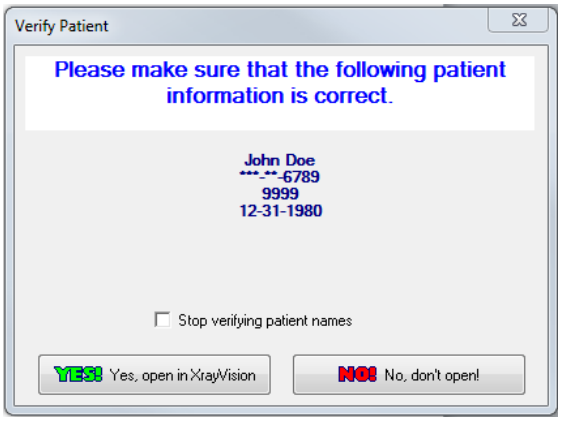
Options

NameGrabber Options controls how the interface and application perform.



Application to Launch – NameGrabber is typically installed when Harmony Imaging is installed and resides in the same installation directory. By default, NameGrabber is configured to run Harmony's executable file ***Harmony.exe*** that resides in the same directory. To launch another Harmony Imaging product instead, select the **Browse** button and navigate to the install directory and select **the appropriate program**.

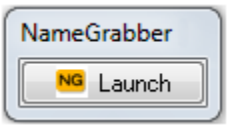
Verify Names Before launch - When this option is enabled, NameGrabber will display a Verify Patient dialog displaying the extracted patient's information. This dialog is displayed when the user left clicks on the NG icon in the system tray.



Start Automatically when Windows Starts - When this option is enabled, NameGrabber will automatically be started when the computer starts. If this option is disabled, then the NameGrabber application will have to be manually started by the user when they want to use it.

Launch the patient's Image Bar when bridging to Harmony – When this option is enabled and a patient that already has images is bridged, the patient's record will be opened in Harmony and the floating image bar feature will be invoked, displaying all the patient's images.

Display floating invocation button - A floating NameGrabber icon can be enabled, allowing users to click and bridge using a floating button rather than the icon located in the system tray.



- **Display as standard window** - This option allows a floating button to be placed on the desktop. It will not stay on top of other windows.
- **Keep the button on top of other windows** - This option functions the same as the one listed above, but the floating icon will be kept above all other windows on the desktop so it does not get 'lost'.

- **Marry the button to a specific application** - This option allows the NameGrabber floating icon to be linked to another window. For example, the floating NameGrabber icon can be married to the practice management chart window, so that anytime a patient's chart is displayed, the NameGrabber button will also appear. (See below for instructions.)

To marry the NameGrabber button to an application:

Access NameGrabber Options and enable the **Display floating invocation button** option.

From the dropdown menu, select **Marry the button to a specific application**.

Drag the crosshair icon over the title bar of the window to which the floating NameGrabber icon will be linked.

Click **OK**.

Send/Receive Remote Notifications – NameGrabber version 2.1 build 10 and above has the ability to bridge patient information through Remote Desktop Protocol (RDP) sessions. For more information, refer to Appendix B: Operability in Remote Access Environments for more information.

Reset Warnings - The reset warnings button may be used to reset all warnings issued by NameGrabber for which the user selected the **Do not display this message again** option.

Technical Support

If answers are not found in the help guide, the Technical Support menu provides the phone number and email address for Jazz Technical Support.

Web Links

Using the Web Links option, users can navigate to the Jazz Imaging home page, or go to the downloads page where all new updates can be downloaded free of charge.

About

Click **About** to display a scrolling window containing the NameGrabber version and build number information. Additionally, Trademark, Patent, and Registration information is also displayed.

Exit

Clicking **Exit** will close NameGrabber.

DATADRILLS

Overview

Although NameGrabber can operate without a DataDrill to simply grab basic patient information, (such as first name and last name) from a PM interface, this information on its own may not uniquely identify the patient. For example, more than one patient in a PM application may share the common name "John Smith". For this reason, NameGrabber is typically used in conjunction with PM-Specific DataDrills that are installed with Harmony Imaging. When NameGrabber grabs patient information and sends it to the Harmony Imaging software, the imaging application utilizes the DataDrill to extract additional patient demographic information – e.g. birthdate, ID number, gender - directly from the PM database. It then uses the information from the practice management database to create or open a patient record in Harmony Imaging.

On occasion, there may be a case where a DataDrill does not exist for your practice management software. Should a DataDrill not exist, please contact Jazz Support. Our support staff can remotely login to the system and review the practice management software to determine if a DataDrill is necessary and what files are needed in order to produce one.

Adding/Updating DataDrills in Harmony Imaging

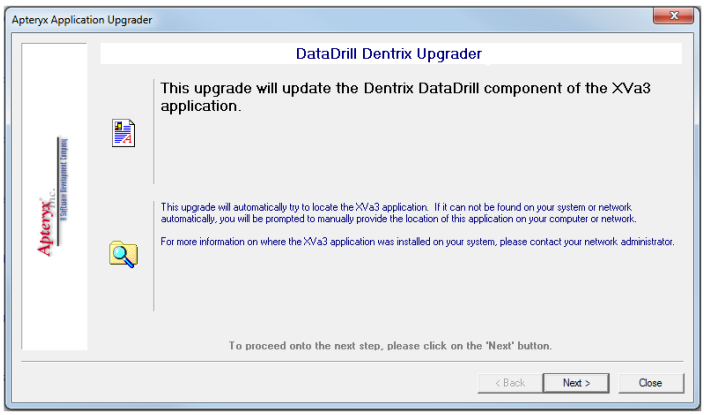
DataDrills may be added to Harmony by using the Harmony Imaging installation CD (through the standard Windows Modify option) or by running the appropriate upgrader from the Jazz Product Updates site.

To download and install/upgrade DataDrills:

Close every instance of Harmony running on any server/workstation on the network.

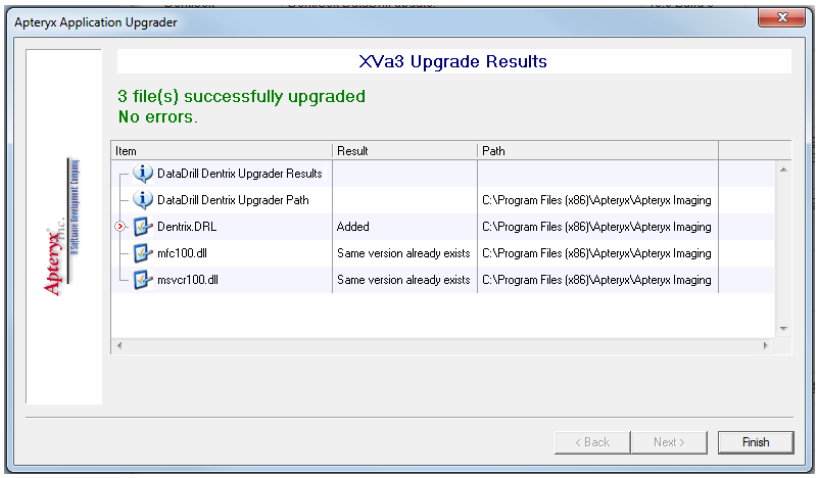
Expand the 'NameGrabber and DataDrills' section and click on the link corresponding to the practice management software to download the appropriate DataDrill.

Run the DataDrill upgrader. The application updater wizard displays. Click **Next**.



If Harmony is still running, a warning message will appear indicating that the application MUST be closed before the upgrader can be run.

The DataDrill Upgrader installs or updates all the necessary DataDrill and support files for Harmony.



Click **Finish**.

Configuring DataDrill Options

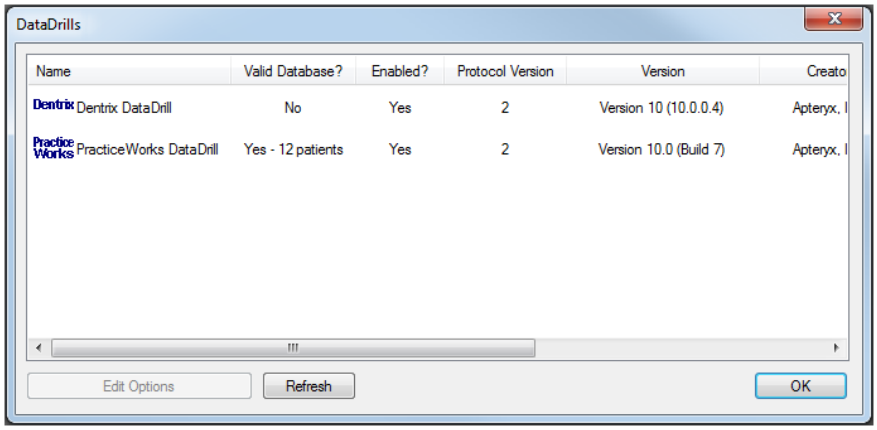
DataDrill options allow users to specify where databases can be located on your network, but also various options such as database caching that can be used to improve the performance of data retrieval.

To access and configure the DataDrill Options in Harmony:

Launch the imaging application (Harmony).

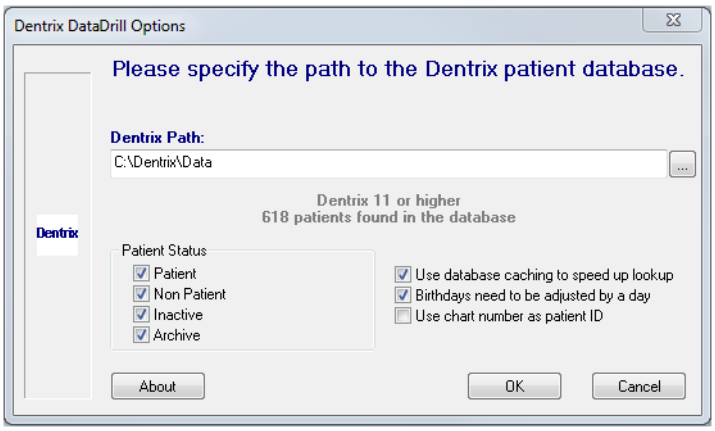
Harmony®: Select ***Database > DataDrills > DataDrill Options***.

The 'Data Drills' window appears.



The DataDrill options display all the DataDrills currently installed with Harmony and whether or not they point to a valid practice management database.

Double-click on the DataDrill to be modified. The Data Drill Options window appears.



Each DataDrill has a different set of options depending on what type of database each one utilizes as well as what additional options are offered by the target practice management application. Some DataDrills require that each workstation specify a Windows ODBC driver to connect to the practice management database. This is typically the case if the practice management software utilizes a database engine (e.g. SQL, MS Access). Please contact Jazz Support for assistance with this setup.

Click **OK** after all modifications are complete.

USING NAMEGRABBER™ TO BRIDGE PATIENTS

Overview

NameGrabber and DataDrills are used in tandem to grab patient information from a practice management application and automatically open or create the patient in an Harmony Imaging program.

NameGrabber understands how to extract what patient is currently open in a third-party practice management application using Sniffer Definitions.

When launched on each workstation in a dental practice, it simply resides as an icon in the system tray (typically in the lower right-hand corner of the computer screen).

Bridging a Patient from the PM to the Harmony Imaging Software

To automatically open or create a corresponding patient record in Harmony:

Open the patient file in the practice management application and view the window defined in a matching sniffer definition (typically a patient information or patient chart screen).

Click on the NameGrabber icon in the system tray.

NameGrabber proceeds to extract the patient name (and any additional identification and demographic information, if available) from the PM application, and creates a new patient record or opens an existing patient record in Harmony.

Patient identification and demographic information is typically extracted from the practice management database using a DataDrill. DataDrills are the main work horses when it comes to extracting patient information from practice management applications. DataDrills are the components that actually understand how to burrow into an application's database and extract the necessary patient information. Unlike NameGrabber, DataDrills operate behind the scene unbeknownst to the user. Refer to How NameGrabber™ And DataDrills Work Together for detailed information.

How NameGrabber And DataDrills Work Together

The user clicks on the NameGrabber icon in the system tray.

NameGrabber checks to see which application the user is currently using and extracts as much patient information from the open application (i.e. the patient's first name and last name).

NameGrabber passes the patient name to the appropriate DataDrill installed to have it find out the patient's SSN, ID#, DOB and sex.

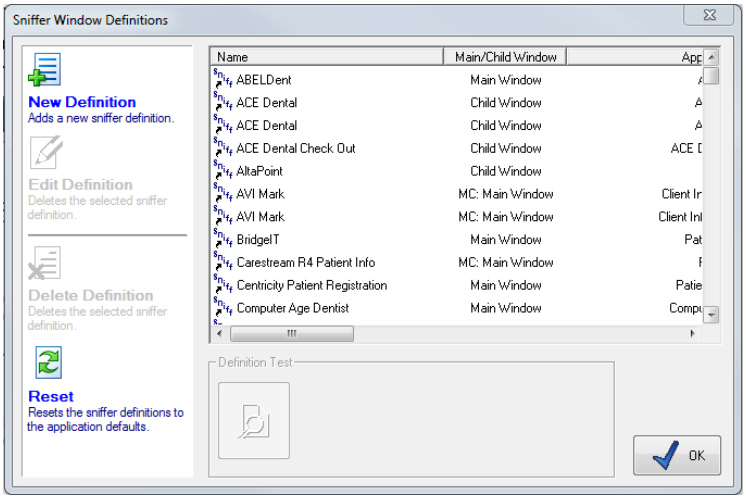
The DataDrill mounts the PM application’s database and extracts the information and then passes it to Harmony, automatically launching it if is not already running.

APPENDIX A: APPLICATION SNIFFER DEFINITIONS

Overview

Application sniffer definitions let NameGrabber determine exactly which practice management applications it should search for when trying to determine which patient the user is currently working with.

NameGrabber sniffer definitions can be accessed by right-clicking on the NameGrabber icon in the system tray and selecting ***Customize > Application Sniffer Definitions***.



Application Sniffer Definitions are listed by practice management name. Each application commonly has multiple sniffer definitions that correspond with different versions and pages in the practice management interface.

In general, sniffer entries identify an application and child window to search for when tracking down patient names as well as the format that is to be used to extract out the patient information once the window has been found.

The 'Sniffer Definitions' window provides users the following functionality:

⚠ **Warning:** Jazz recommends that you do not use these wizards directly unless you are on-line with Harmony technical support or have had training from Harmony in generating Application Sniffer definitions. To have Harmony create a custom sniffer definition for you, please contact our support at 567-234-5299 x300.

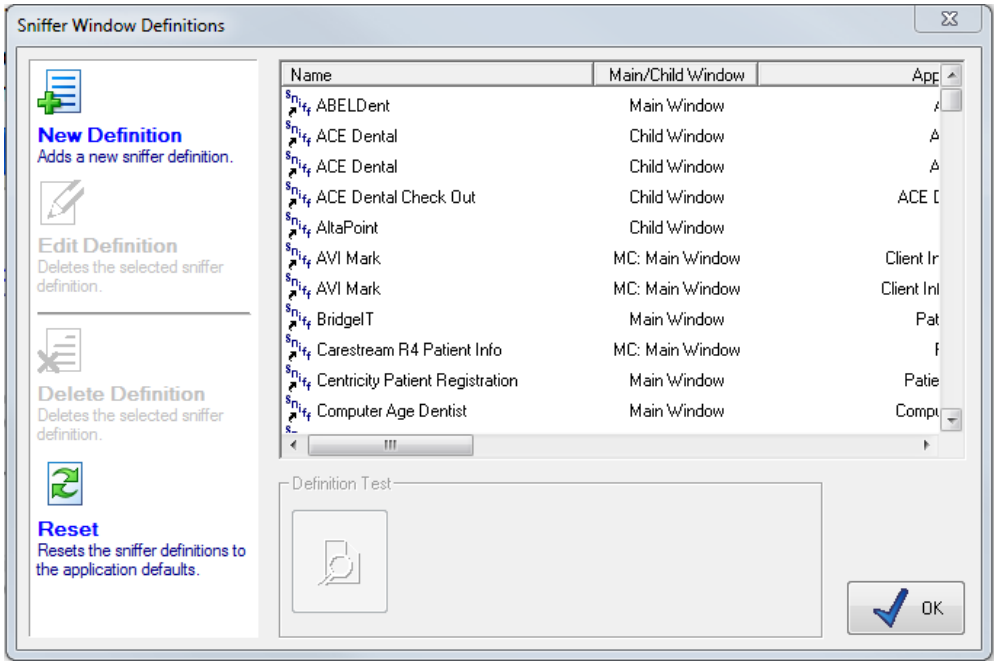
- **New Definition** - Creates a new application sniffer entry.
- **Edit Definition** - Edits a selected application sniffer entry. Entries are selected by clicking on them with the left mouse button. For more information, please refer to the Sniffer Window Entry Dialog section of this documentation.

- **Delete Definition** - Deletes the selected application sniffer entry. Entries are selected by clicking on them with the left mouse button.
- **Reset** - Resets the application sniffer entries to the application defaults.
- **Definition Test** - Tests the selected definition against all open applications.

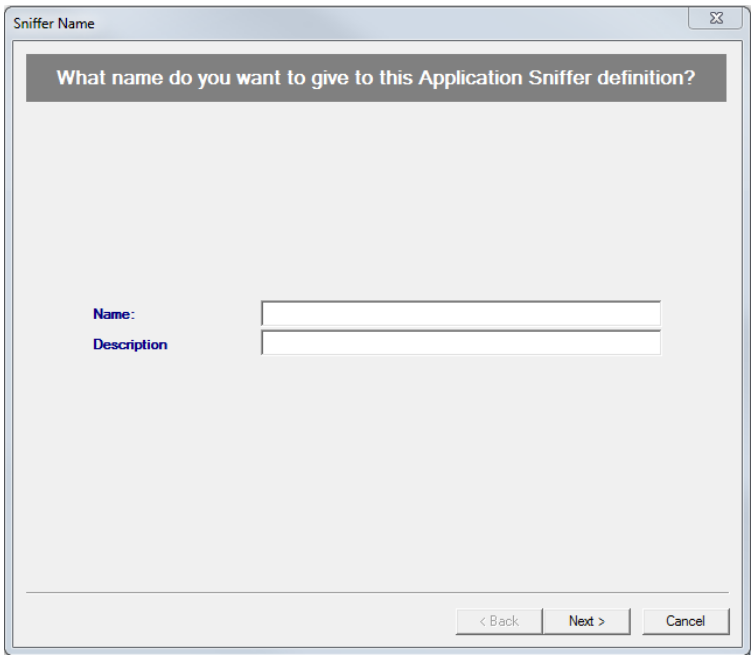
Creating a Sniffer Definition

Right-click on the NameGrabber icon in the system tray and select ***Customize > Application Sniffer Definitions***.

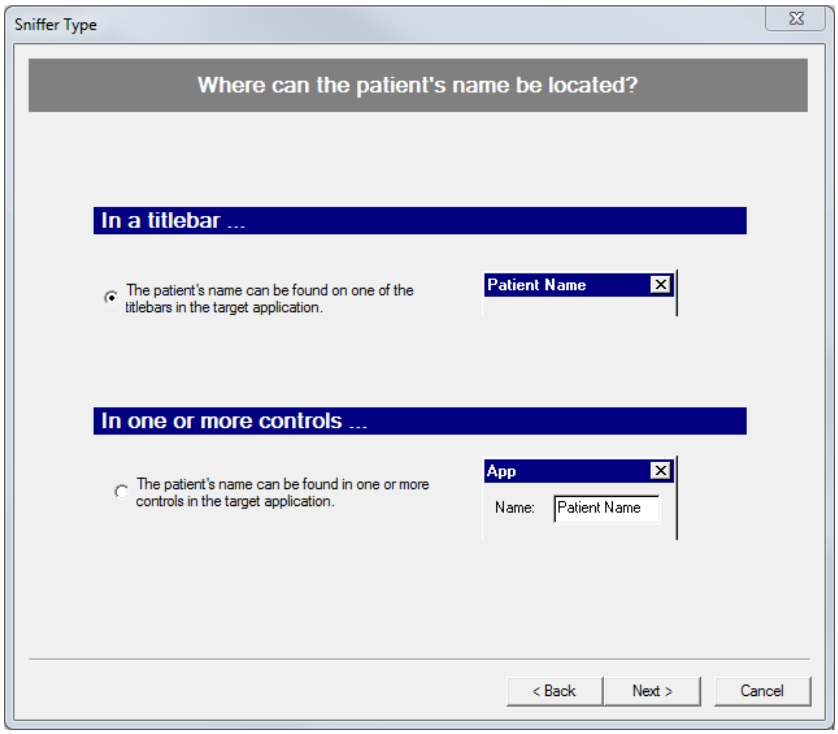
The 'Sniffer Window Definitions' dialog box appears. Select **New Definition**.



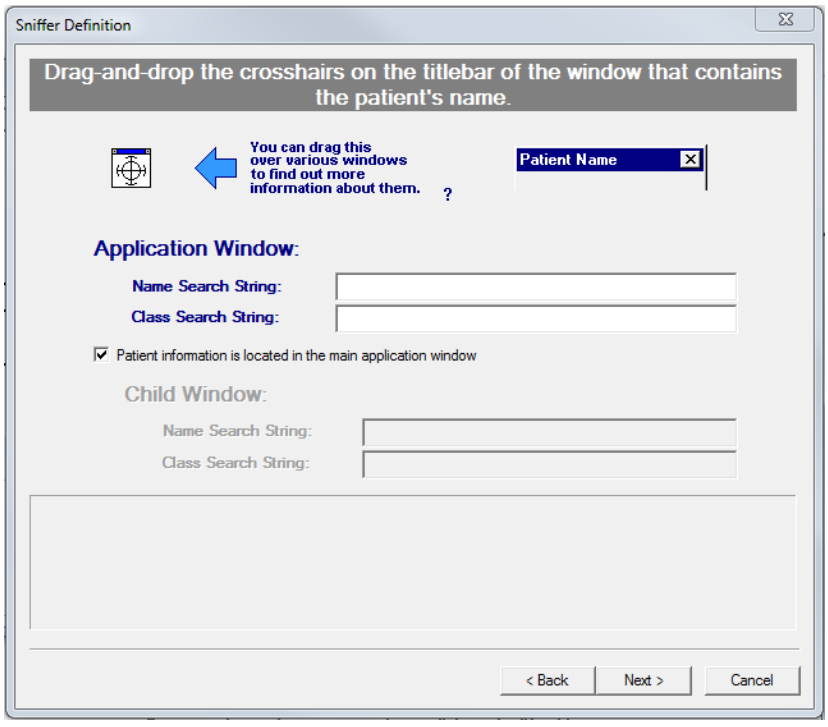
The 'Sniffer Name' window appears. Enter an appropriate **Name** and **Description** in the provided fields for the sniffer definition being created. Click **Next** to continue.



The 'Sniffer Type' window appears. Define where patient information can be found in the practice management application and then click **Next**.

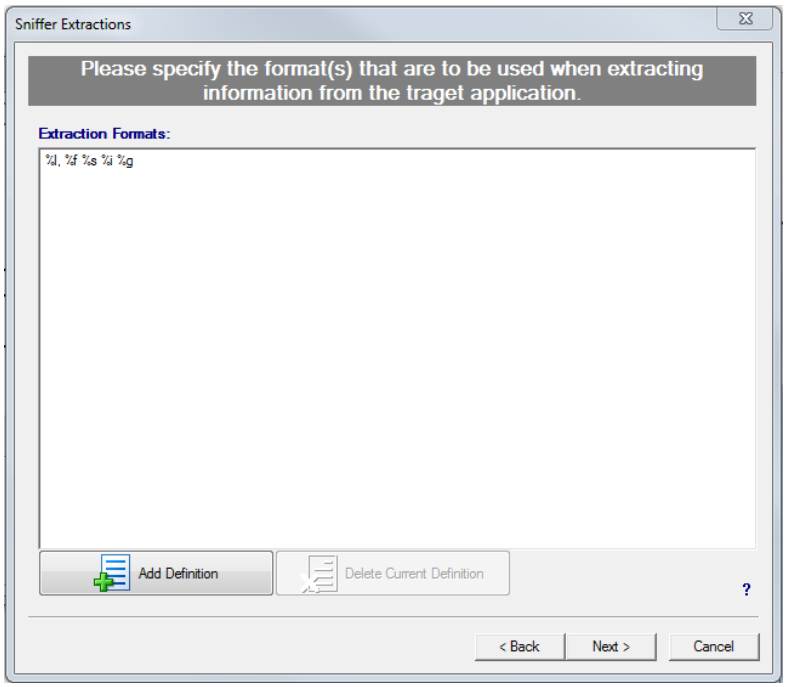


The 'Sniffer Definition' window appears. Drag the Window pull crosshairs overtop of the practice management application window or child window containing patient information. The 'Application Window' and, if applicable, 'Child Window' fields (Name and Class Search Strings) will be auto-populated with information that assists NameGrabber in identify the PM application and window to search for when trying to find patient names. Click **Next** to continue.



Patient and practice information is sometimes extracted by NameGrabber and included in the Application and Child Window Name and Class search string. This unique information should be removed, leaving only the Application name (if present) in the title bar of the practice management software. For example, given an application title bar of "Dentrix Chart - Bob Smith", the search string should be edited to specify just "Dentrix Chart"

If patient information is specified to be found in the practice management title bar (refer to 7.2.4), the 'Sniffer Extraction' window displays.



Click on the **Add Definition** button and specify the extraction format in the field provided. This format is based off of the information contained in the practice management field.

- %f - patient's first name
- %l - patient's last name
- %i – patient's ID number
- %s - patient's SS number (formatted)
- %u - patient's SS number (unformatted)
- %d - patient's date-of-birth
- %n - patient's name (first last)
- %p - patient's name (last, first)
- %x - discardable string of characters
- %c - discardable single character
- %g – the rest of the string is garbage (can only appear at the end of an entry)

Examples:

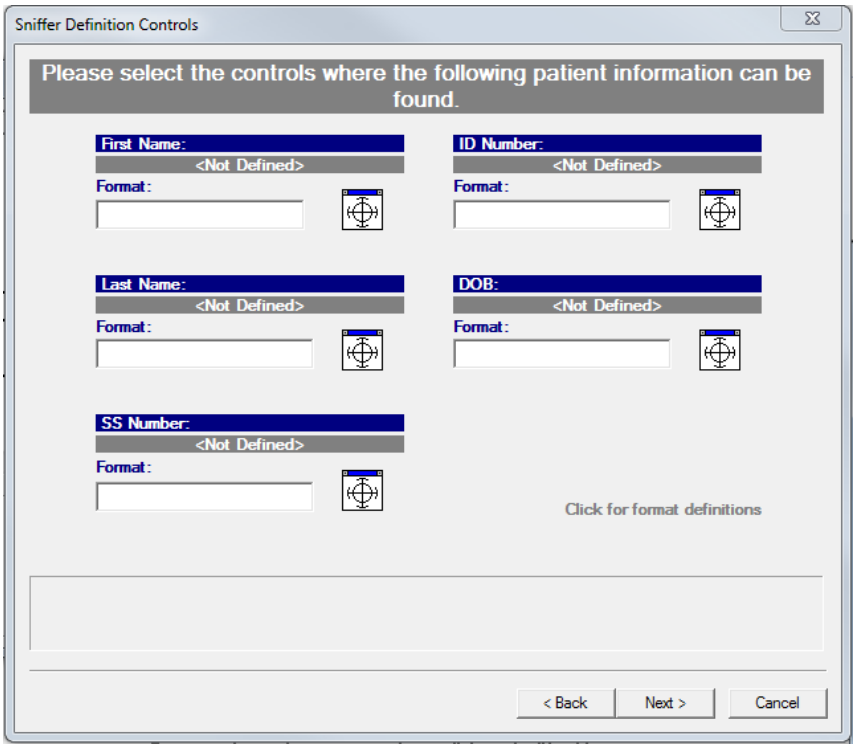
PM Title Bar Entry	Corresponding Extraction Format
(John Doe)[DDS]	(%f %l)%g -or- (%n)%g
Doe, John M. - DDS	%l, %f - %g -or- %p -%g
(Doe, John M.)	(%l, %f) -or- (%p)
John Doe (1234)	%f %l (%i)%g -or- %n (%i)%g

Additional definitions may be added to accommodate the variety of ways a patient name may be displayed in the title bar. For example, some patient records may include a middle initial that must be captured as part of the first name while others don't.

When NameGrabber searches for windows matching the specified formats, it will use the first matching format in the list. For this reason, entries should be ordered from most complex to least. For example, "Dentrix Chart - %f %c. %l" should be listed above "Dentrix Chart - %f %l". Otherwise, a patient's middle initial would be incorrectly appended to the beginning of their last name. Use Window drag-and-drop feature to reorder the list from most complex to least.

Click on **Next** to continue. (Skip to 7.2.8.)

If patient information is specified to be found in one or more controls (refer to 7.4.4), the Sniffer Definition Controls' specification window displays.



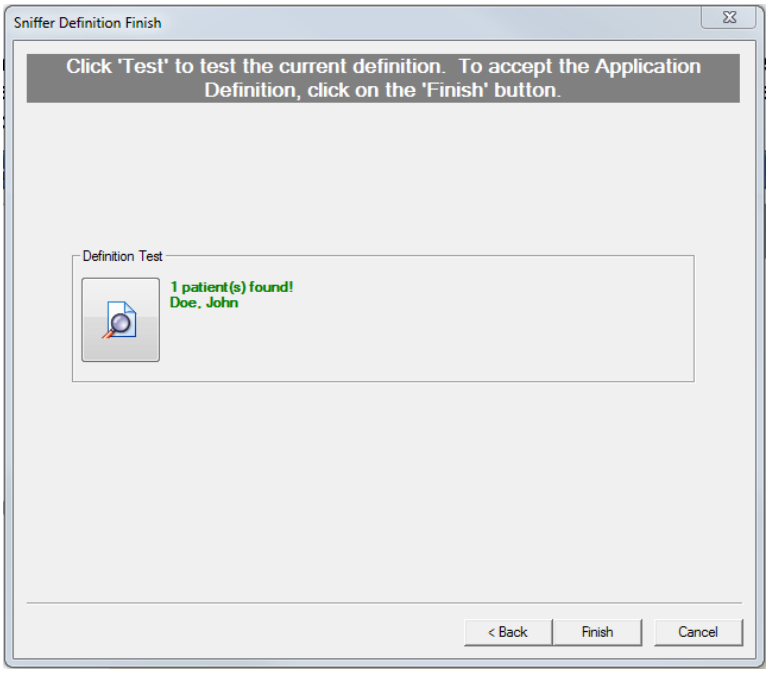
Drag the appropriate patient information crosshairs over each applicable control in the PM application to specify its address in the PM window.

Specify the extraction format in the corresponding 'Format' field. The formatting characters are:

- %f - patient's first name
- %l - patient's last name
- %i – patient’s ID number
- %s - patient's SS number (formatted)
- %u - patient's SS number (unformatted)
- %d - patient's date-of-birth

Click **Next** to continue.

The ‘Sniffer Definition Finish’ window displays. Use the **Definition Test** button to ensure the sniffer definition functions properly. If configured properly, the patient name of the record opened in the practice management application will display.



Click **Finish** when done to exit the wizard.

APPENDIX B: OPERABILITY IN REMOTE ACCESS ENVIRONMENTS

Overview

NameGrabber 2.1 build 10 and above has the ability to bridge patient information through Remote Desktop Protocol (RDP) sessions. It will also work with other remote access utilities, such as Citrix, if the remote session's CLIENTNAME environment variable matches the local computer name.

This functionality is useful for customers who have Practice Management (PM) software only running inside a remote access window, and want to be able to connect back to their imaging software running on the local computer.

This method is only possible if the local computer is capable of running NameGrabber at Windows startup. This may not be possible for certain thin clients.

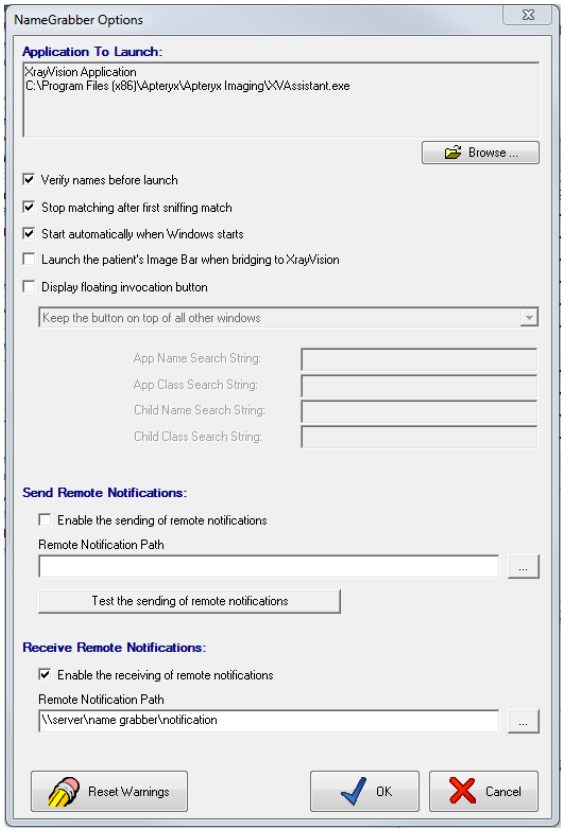
Basic Setup

The following information is approached from the perspective that NameGrabber is installed only on the server, and every location is launching NameGrabber from the same directory, however, these steps should be identical in other scenarios where NameGrabber is installed in various locations.

On each local computer, start NameGrabber and set it up to start automatically at Windows startup.

Follow the instructions below to setup NameGrabber on the local computers:

Right-click the NameGrabber icon and select **Options**. The 'NameGrabber Options' dialog box displays.



Select **Enable the receiving of remote notifications** under the Receive Remote Notifications section.

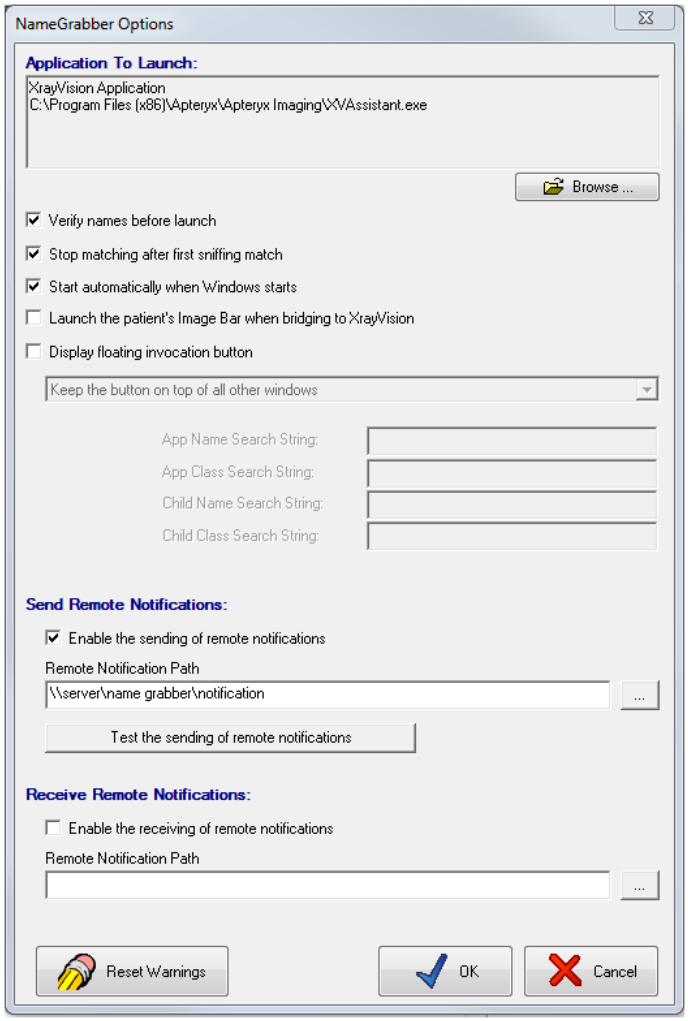
Specify a path on the server where the notifications should be communicated (e.g. ***\\server\NameGrabber\Notification)***.

Click **OK** to save the settings on the local computer.

From the local computer, access the server through a remote desktop connection, start NameGrabber, and set it up to start automatically at Windows startup.

Follow the steps below to set up NameGrabber on the remote server:

Right-click the NameGrabber icon and select **Options**. The 'NameGrabber Options' dialog box displays.



Select **Enable the sending of remote notifications** under the 'Send Remote Notifications' section.

Specify the same path in 8.2.2.3 (e.g. ***\\server\NameGrabber\Notification***).

Click **OK** to save the settings on the remote server.

Using NameGrabber in a Remote Desktop Environment

Follow the steps below to invoke the bridge in a remote access environment.

Open the proper patient window in the PM application.

Click on the NameGrabber icon *located inside the remote desktop window*.

Note that the imaging software launches on the local workstation.

Technical description: NameGrabber will temporarily store the patient information in a text document that is named specifically after the "Client Name" value reported by Windows, which should typically be the local computer's name. Likewise, the local computer's NameGrabber monitors that directory for a text file containing its local computer name. When it finds the text file, it will read the patient information from the file, remove the text file, and send the patient information to the imaging software.

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