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1. About this Guide

This guide details the steps required to configure a load balanced Meditech API environment utilizing Loadbalancer.org appliances. It covers the configuration of the load balancers and also any Meditech API configuration changes that are required to enable load balancing.

For more information about initial appliance deployment, network configuration and using the Web User Interface (WebUI), please also refer to the Administration Manual.

2. Loadbalancer.org Appliances Supported

All our products can be used with Meditech API servers. For full specifications of available models please refer to https://www.loadbalancer.org/products. Some features may not be supported in all cloud platforms due to platform specific limitations, please check with Loadbalancer.org support for further details.

3. Loadbalancer.org Software Versions Supported

- V8.3.8 and later

4. Meditech RESTful API Software Versions Supported

- Meditech RESTful API – all versions

5. Meditech RESTful API

The RESTful API Infrastructure allows MEDITECH and third party vendor software to securely access the MEDITECH EHR through APIs. Interoperability Services (or IOPS) — which is a component of the RESTful API Infrastructure and installed on the same machine(s) — adds a set of APIs to meet Meaningful Use Stage 3 (MU3) and Imaging Appropriate Use Criteria (AUC) requirements. RESTful API is independent from any other web products or interoperability interfaces MEDITECH offers and requires dedicated hardware.

RESTful API is independent from any other web products or interoperability interfaces MEDITECH offers and requires dedicated hardware.

6. Load Balancing Meditech RESTful API

Note

It's highly recommended that you have a working Meditech RESTful API environment first before implementing the load balancer.

SSL certificates must be placed either on the load balancer and/or the real servers.

DNS entries for the API and Application end-point for each MRI or HIM database are required.

SSL termination or SSL bridging are the recommended configurations for load balancing Meditech RESTful API.

Requirements

API Servers(s)

An optimal RESTful API Infrastructure configuration consists of two or more servers running the RESTful API services as well as Interoperability Services. The cluster helps to ensure better performance and failover protection for the Infrastructure. These servers host the web services which clients connect to.
Hardware
- Server Type: Physical or Virtual
- 4 Cores, 2GHz+
- 4GB RAM
- C: Partition: 60GB - used for OS and service installations
- E: Partition: 40GB - used for server logs

Software
- 64-bit Windows Server 2012 Standard Edition

Cache Server
The Redis service, which is installed on the Cache Server, reduces latency and increases performance on requests by reducing the number of hits to the database. The cache is memory-only, meaning it is never persisted to disk. It is suggested that the Redis service run on its own server. However the Redis service can be installed on one of the API servers if additional servers cannot be obtained. If combining the two servers, it is suggested you increase the RAM available to that API server by 4GB, bringing the total to 8GB for that one API server. This server caches responses and also acts as a messaging service between API Servers.

Hardware
- Server Type: Physical or Virtual
- 4 Cores, 2GHz+
- 4GB RAM
- C: Partition: 60GB - used for OS and service installations

Software
- 64-bit Windows Server 2012 Standard Edition

Database Server
The database stores the configuration and run time details of the RESTful services. It does not store patient data nor does it store any other data that is stored in the MEDITECH database.

A supported database is required. The RESTful API Infrastructure supports:

- MSSQL
- MySQL
- MariaDB

HA Load balancers
- Provides high availability and scalability of the Meditech RESTful API services
- It allows the end user to mitigate or prevent SSL vulnerabilities and to configure the SSL parameters according to their regulatory and corporate requirements
- It allows the end user to install and maintain their SSL certificates in a single location instead of across multiple servers/services
• Using DNS round-robin for failover does not provide graceful failover to the client - the client software needs to be smart enough to retry the connection using another IP, depending on the client’s technology, this can take seconds or minutes, whereas failover with a load balancer or proxy is nearly instantaneous.

• When configured for SSL Termination, this reduces the CPU load on the RESTful API Infrastructure servers.

Persistence (aka Server Affinity)

No persistence is required.

Virtual Service (VIP) Requirements

To provide load balancing and HA for Meditech API and Application, 2 VIPS are required:

• VIP1: Meditech API
• VIP2: Meditech Application

Port Requirements

The following table shows the ports that are load balanced:

<table>
<thead>
<tr>
<th>Port</th>
<th>Protocols</th>
<th>Uses</th>
</tr>
</thead>
<tbody>
<tr>
<td>80</td>
<td>TCP/HTTP</td>
<td>This will respond to API requests that originate from the proxy. Requests directly to the server or from an untrusted proxy will be issued a redirect to HTTPS.</td>
</tr>
<tr>
<td>8081</td>
<td>TCP/HTTPS</td>
<td>This will respond to Application requests that originate from the proxy. Requests directly to the server or from an untrusted proxy will be issued a redirect to HTTPS.</td>
</tr>
<tr>
<td>443</td>
<td>TCP/HTTPS</td>
<td>This is the connection clients make to access the API and/or Application services proxied by the load balancer/proxy.</td>
</tr>
</tbody>
</table>

Note: Ports displayed are default and can be configured to ports applicable to the customer’s environment.

TLS/SSL Termination

There are two suggested configurations concerning the Meditech RESTful API and Application, both of which are supported on the load balancer.

1. SSL Termination - this is when the connection to the load balancer is encrypted with SSL but the connection from the load balancer to the RESTful services is not encrypted.

2. SSL Bridging - this is when the connection to the load balancer is encrypted with SSL and the connection from the load balancer to the RESTful services is also encrypted, sometimes using different certificates.

Note: SSL Pass-through is not a recommended configuration as it directly exposes the SSL implementation included in the RESTful services to the Internet.

7. Deployment Concept

Meditech RESTful API can be load balanced in two different ways, as shown in the diagrams that follow:
• **Recommended deployment:** Uses two virtual services to load balance the Meditech API servers which then make a connection to the Cache servers and any other Meditech related server, such as Platform Service, File Library, Monitor Service on the backend.

• **Minimum deployment:** Uses two virtual services to load balance the Meditech API servers which have both the API and Cache services installed on the same server. The server then makes a connection to the other Meditech related servers, such as Platform Service, File Library, Monitor Service on the backend.

### Scenario 1 – Recommended Deployment Using SSL Offloading

```
Encrypted → Unencrypted
```

VIPS = Virtual IP Addresses

**Note**
The load balancer can be deployed as a single unit, although Loadbalancer.org recommends a clustered pair for resilience & high availability. Please refer to Configuring HA - Adding a Secondary Appliance for more details on configuring a clustered pair.

In this deployment, two virtual services are used in addition to a TLS/SSL termination. The virtual services use layer 7 SNAT mode. An SSL certificate is uploaded and associated to the Virtual Service. Data is encrypted from the client to the load balancer, but is unencrypted from the load balancer to the backend servers as shown above.

### Scenario 2 – Recommended Deployment Using SSL Bridging

```
Encrypted → (Internal Only) → Encrypted
```

In this deployment, two virtual services are used in addition to a TLS/SSL termination. The virtual services use layer 7 SNAT mode. An SSL certificate is uploaded and associated to the Virtual Service. Data is encrypted from the client to the load balancer, but is unencrypted from the load balancer to the backend servers as shown above.
VIPs = Virtual IP Addresses

Note

The load balancer can be deployed as a single unit, although Loadbalancer.org recommends a clustered pair for resilience & high availability. Please refer to Configuring HA - Adding a Secondary Appliance for more details on configuring a clustered pair.

In this deployment, two virtual services are used in addition to a TLS/SSL termination. The virtual services use layer 7 SNAT mode with re-encrypt to backend enabled. An SSL certificate is uploaded and associated to the Virtual Service. Data is encrypted from the client to the load balancer and is also encrypted from the load balancer to the backend servers as shown above.

8. Load Balancer Deployment Methods

The load balancer can be deployed in 4 fundamental ways: Layer 4 DR mode, Layer 4 NAT mode, Layer 4 SNAT mode, and Layer 7 SNAT mode.

For Meditech RESTful API, using layer 7 SNAT mode is recommended due to it being a full proxy meaning the load balanced Real Servers do not need to be changed in any way.

This load balancing mode is described below and is used for the configurations presented in this guide.

Layer 7 SNAT Mode

Layer 7 SNAT mode uses a proxy (HAProxy) at the application layer. Inbound requests are terminated on the load balancer and HAProxy generates a new corresponding request to the chosen Real Server. As a result, Layer 7 is typically not as fast as the Layer 4 methods. Layer 7 is typically chosen when either enhanced options such as SSL termination, cookie based persistence, URL rewriting, header insertion/deletion etc. are required, or when the network topology prohibits the use of the layer 4 methods.

• Layer 7 SNAT mode is a full proxy and therefore load balanced Real Servers do not need to be changed in any way.
• Because layer 7 SNAT mode is a full proxy, any server in the cluster can be on any accessible subnet including
across the Internet or WAN.

- Layer 7 SNAT mode is not transparent by default, i.e. the Real Servers will not see the source IP address of the client, they will see the load balancer’s own IP address by default, or any other local appliance IP address if preferred (e.g. the VIP address). This can be configured per layer 7 VIP.

If required, the load balancer can be configured to provide the actual client IP address to the Real Servers in 2 ways. Either by inserting a header that contains the client’s source IP address, or by modifying the Source Address field of the IP packets and replacing the IP address of the load balancer with the IP address of the client. For more information on these methods please refer to Transparency at Layer 7.

- Layer 7 SNAT mode can be deployed using either a one-arm or two-arm configuration.
- Port translation is possible with Layer 7 SNAT mode, e.g. VIP:80 → RIP:8080 is supported.
- You should not use the same RIP:PORT combination for layer 7 SNAT mode VIPs and layer 4 SNAT mode VIPs because the required firewall rules conflict.

9. Configuring Meditech RESTful API for Load Balancing

Some changes must be made to the Meditech RESTful API server environment in order for them to be correctly load balanced. These changes need to be configured by in-house IT staff or a vendor.

DNS Entries

A DNS entry is needed for the API and Application end-point for each MRI or HIM database (both TEST and LIVE). These records should all point to VIPs on your Load Balancer - you may use one or multiple VIPs when configuring your Load Balancer.

It is suggested that the API services use different VIP(s) from Application services. This makes it easier to restrict access to the Application to only those clients that are on your network. If they shared a VIP, your firewall would need to be able to do deep packet inspection and disallow access to the hostnames for the Application services when accessed over the Internet.

Example

If you have 3 LIVE rings with 1 HIM database each and 3 TEST rings with 1 HIM database each, we would expect the following DNS entries:

```
mtrestapis-live01.CUSTOMER-DOMAIN
mtrestapis-live02.CUSTOMER-DOMAIN
mtrestapis-live03.CUSTOMER-DOMAIN
mtrestapis-test01.CUSTOMER-DOMAIN
mtrestapis-test02.CUSTOMER-DOMAIN
mtrestapis-test03.CUSTOMER-DOMAIN
mtrestapps-live01.CUSTOMER-DOMAIN
mtrestapps-live02.CUSTOMER-DOMAIN
mtrestapps-live03.CUSTOMER-DOMAIN
mtrestapps-test01.CUSTOMER-DOMAIN
mtrestapps-test02.CUSTOMER-DOMAIN
mtrestapps-test03.CUSTOMER-DOMAIN
```

When not exposing the Application to the Internet, only the `mtrestapis-*` entries would resolve on your public DNS. The DNS entries allow the infrastructure to differentiate requests as it is possible that an identifier may be reused in one or more databases. Additionally, the API and Application services run on different ports and within different processes because the workloads are significantly different.
Virtual Appliance

A fully featured, fully supported 30 day trial is available if you are conducting a PoC (Proof of Concept) deployment. The VA is currently available for VMware, Virtual Box, Hyper-V, KVM, XEN and Nutanix AHV and has been optimized for each Hypervisor. By default, the VA is allocated 2 vCPUs, 4GB of RAM and has a 20GB virtual disk. The Virtual Appliance can be downloaded here.

Note
The same download is used for the licensed product, the only difference is that a license key file (supplied by our sales team when the product is purchased) must be applied using the appliance’s WebUI.

Note
Please refer to The Virtual Appliance - Hypervisor Deployment and the ReadMe.txt text file included in the VA download for more detailed information on deploying the VA using various Hypervisors.

Note
For the VA, 4 NICs are included but only eth0 is connected by default at power up. If the other NICs are required, these should be connected using the network configuration screen within the Hypervisor.

Initial Network Configuration

After boot up, follow the instructions on the console to configure the IP address, subnet mask, default gateway, DNS and other network settings.

Important
Be sure to set a secure password for the load balancer, when prompted during the setup routine.

Accessing the WebUI

The WebUI is accessed using a web browser. By default, user authentication is based on local Apache .htaccess files. User administration tasks such as adding users and changing passwords can be performed using the WebUI menu option: Maintenance > Passwords.

Note
A number of compatibility issues have been found with various versions of Internet Explorer and Edge. The WebUI has been tested and verified using both Chrome & Firefox.

Note
If required, users can also be authenticated against LDAP, LDAPS, Active Directory or Radius. For more information please refer to External Authentication.

1. Using a browser, access the WebUI using the following URL:


2. Log in to the WebUI:

   Username: loadbalancer
   Password: <configured-during-network-setup-wizard>
Note | To change the password, use the WebUI menu option: Maintenance > Passwords.

Once logged in, the WebUI will be displayed as shown below:

![WebUI screenshot]

**Note** | The WebUI for the VA is shown, the hardware and cloud appliances are very similar. The yellow licensing related message is platform & model dependent.

3. You’ll be asked if you want to run the Setup Wizard. If you click **Accept** the Layer 7 Virtual Service configuration wizard will start. If you want to configure the appliance manually, simple click **Dismiss**.

**Main Menu Options**

**System Overview** - Displays a graphical summary of all VIPs, RIPs and key appliance statistics
HA Clustered Pair Configuration

Loadbalancer.org recommend that load balancer appliances are deployed in pairs for high availability. In this guide a single unit is deployed first, adding a secondary unit is covered in Configuring HA - Adding a Secondary Appliance.

11. Appliance Configuration for Meditech API – Using Layer 7 SNAT Mode (Scenario 1: Recommended Deployment Using SSL Offloading)

Configuring the API Virtual Service (VIP1)

1. Using the web user interface, navigate to Cluster Configuration > Layer 7 – Virtual Services and click on Add a new Virtual Service.

2. Define the Label for the virtual service as required, e.g. MeditechAPI.

3. Set the Virtual Service IP Address field to the required IP address, e.g. 192.168.86.140.

4. Set the Ports field to 80.

5. Leave the Protocol set to HTTP mode.

6. Click Update to create the virtual service.

7. Now click Modify next to the newly created VIP.

8. Set Balance mode to Weighted Round Robin.

9. Scroll down to the Persistence section and set Persistence Mode to None.
10. In the Health Checks section set _Health Checks_ to **Negotiate HTTP (HEAD)**.

11. Leave **Response expected** blank, which will configure the load balancer to look for a ‘**200 OK**’ response.

12. Scroll down to the Other section and click **[Advanced]**.

13. Enable (check) the Timeout checkbox and set both **Client Timeout & Real Server Timeout** to **5m**.

14. Ensure that **Set X-forwarded-For Header** is enabled (checked).

15. Set **Force to HTTPS** to **Yes**.

16. Click **Update**.

**Defining the Real Servers (RIPs)**

1. Using the WebUI, navigate to **Cluster Configuration > Layer 7 – Real Servers** and click **Add a new Real Server** next to the newly created VIP.

2. Enter an appropriate label for the RIP, e.g. **MeditechAPI1**.

3. Change the **Real Server IP Address** field to the required IP address, e.g. **192.168.86.50**.

4. Leave the real server port field empty.

5. Click **Update**.

6. Repeat the above steps to add additional MeditechAPI Server(s).

7. Click **Reload HAProxy** to commit the configuration.

**Configuring the Application Virtual Service (VIP2)**

1. Using the web user interface, navigate to **Cluster Configuration > Layer 7 – Virtual Services** and click on **Add a new Virtual Service**.

2. Define the **Label** for the virtual service as required, e.g. **Meditech_APP**.

3. Set the **Virtual Service IP Address** field to the required IP address, e.g. **192.168.86.65**.

4. Set the **Ports** field to **8081**.

5. Leave the **Protocol** set to **HTTP mode**.
6. Click **Update** to create the virtual service.

7. Now click **Modify** next to the newly created VIP.

8. Set *Balance mode* to **Weighted Round Robin**.

9. Scroll down to the Persistence section and set *Persistence Mode* to **None**.

10. In the Health Checks section set *Health Checks* to **Negotiate HTTP (HEAD)**.

11. Leave *Response expected* blank, which will configure the load balancer to look for a '200 OK' response.

12. Scroll down to the Other section and click **[Advanced]**.

13. Enable (check) the Timeout checkbox and set both *Client Timeout*_ and *Real Server Timeout* to **5m**.

14. Ensure that *Set X-forwarded-For Header* is enabled (checked).

15. Set *Force to HTTPS* to **Yes**.

16. Click **Update**.

**Defining the Real Servers (RIPs)**

1. Enter an appropriate label for the RIP, e.g. *Meditech_APP1*.

2. Change the *Real Server IP Address* field to the required IP address, e.g. *192.168.86.50*.

3. Leave the real server port field empty.
4. Click Update.
5. Repeat the above steps to add your other Meditech_APP Server(s).
6. Click Reload HAProxy to commit the configuration.

12. Appliance Configuration for Meditech API – Using Layer 7 SNAT Mode (Scenario 2: Recommended Deployment Using SSL Bridging)

Configuring the API Virtual Service (VIP1)
1. Using the web user interface, navigate to Cluster Configuration > Layer 7 – Virtual Services and click on Add a new Virtual Service.
2. Define the Label for the virtual service as required, e.g. MeditechAPI.
3. Set the Virtual Service IP Address field to the required IP address, e.g. 192.168.86.140.
4. Set the Ports field to 80.
5. Leave the Protocol set to HTTP mode.
6. Click **Update** to create the virtual service.

7. Now click **Modify** next to the newly created VIP.

8. Set **Balance mode** to **Weighted Round Robin**.

9. Scroll down to the Persistence section and set **Persistence Mode** to **None**.

10. In the Health Checks section set **Health Checks** to **Negotiate HTTP (HEAD)**.

11. Leave **Response expected** blank, which will configure the load balancer to look for a '200 OK' response.

12. Scroll down to the SSL section and check the **Enable Backend Encryption** box.

13. Scroll down to the Other section and click [**Advanced**].

14. Enable (check) the Timeout checkbox and set both **Client Timeout & Real Server Timeout** to **5m**.

15. Ensure that **Set X-forwarded-For Header** is enabled (checked).

16. Set **Force to HTTPS** to **Yes**.

17. Click **Update**.

**Defining the Real Servers (RIPs)**

1. Enter an appropriate label for the RIP, e.g. **Meditech_API1**.

2. Change the **Real Server IP Address** field to the required IP address, e.g. **192.168.86.50**.

3. Enter **443** in the real server port field.

4. Click **Update**.

5. Repeat the above steps to add your other Meditech_API Server(s).

---

**Layer 7 Modify Real Server - MeditechAPI / MeditechAPI1**

<table>
<thead>
<tr>
<th>Label</th>
<th>MeditechAPI1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Real Server IP Address</strong></td>
<td>192.168.86.50</td>
</tr>
<tr>
<td><strong>Real Server Port</strong></td>
<td>443</td>
</tr>
<tr>
<td><strong>Re-Encrypt to Backend</strong></td>
<td>✔</td>
</tr>
</tbody>
</table>

---

**Configuring the Application Virtual Service (VIP2)**

1. Using the web user interface, navigate to **Cluster Configuration > Layer 7 – Virtual Services** and click on **Add a new Virtual Service**.
2. Define the *Label* for the virtual service as required, e.g. **Meditech_APP**.

3. Set the *Virtual Service IP Address* field to the required IP address, e.g. **192.168.86.65**.

4. Set the *Ports* field to **8081**.

5. Leave the *Protocol* set to **HTTP mode**.

6. Click **Update** to create the virtual service.

7. Now click **Modify** next to the newly created VIP.

8. Set **Balance mode** to **Weighted Round Robin**.

9. Scroll down to the Persistence section and set **Persistence Mode** to **None**.

10. In the Health Checks section set **Health Checks** to **Negotiate HTTP (HEAD)**.

11. Leave **Response expected** blank, which will configure the load balancer to look for a '200 OK' response.

12. Scroll down to the SSL section and check the **Enable Backend Encryption** box.

13. Scroll down to the Other section and click [Advanced].

14. Enable (check) the Timeout checkbox and set both **Client Timeout & Real Server Timeout** to **5m**.

15. Ensure that **Set X-forwarded-For Header** is enabled (checked).

16. Set **Force to HTTPS** to **Yes**.

17. Click **Update**.

**Defining the Real Servers (RIPs)**

1. Enter an appropriate label for the RIP, e.g. **Meditech_APP1**.

2. Change the *Real Server IP Address* field to the required IP address, e.g. **192.168.86.50**.

3. Enter **443** in the real server port field.
4. Click Update.

5. Repeat the above steps to add your other Meditech_APP Server(s).

Setting Up the TLS/SSL Termination

Uploading a Certificate

An appropriate certificate must be present on the load balancer for TLS/SSL termination to work. Typically, a valid certificate is uploaded to the load balancer for use. The process for doing this is as follows:

1. Using the web user interface, navigate to Cluster Configuration > SSL Certificate and click on Add a new SSL Certificate.
2. Press the Upload prepared PEM/PFX file radio button.
3. Define the Label for the certificate as required, e.g. Meditech_Certificate.
4. Click on Browse and select the appropriate PEM or PFX style certificate.
5. If uploading a PFX certificate, enter the certificate’s password in the PFX File Password field.

6. Click Upload certificate.

In the absence of a valid certificate, it is also possible to create a Certificate Signing Request (CSR) on the load
balancer. A CSR can be submitted to a certificate authority for the issuance of a certificate. For more information please refer to Generating a CSR on the Load Balancer

Creating the TLS/SSL Termination (SSL Offloading)

1. Using the web user interface, navigate to Cluster Configuration > SSL Termination and click on Add a new Virtual Service.

2. Using the Associated Virtual Service drop-down list, select the MeditechAPI service which was created previously.

   **Note** Once the VIP is selected, the Label field will be auto-populated with SSL-MeditechAPI. This can be changed if preferred.

3. Set the Virtual Service Port field to 443.

4. From the SSL Certificate drop-down list, select the appropriate certificate.

```
<table>
<thead>
<tr>
<th>Label</th>
<th>SSL-MeditechAPI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associated Virtual Service</td>
<td>MeditechAPI</td>
</tr>
<tr>
<td>Virtual Service Port</td>
<td>443</td>
</tr>
<tr>
<td>SSL Operation Mode</td>
<td>High Security</td>
</tr>
<tr>
<td>SSL Certificate</td>
<td>Meditech_Certificate</td>
</tr>
</tbody>
</table>
```

5. Click **Update** to create the TLS/SSL termination service.

6. Repeat the above steps to configure TLS/SSL termination for your other Meditech_API virtual service.

Creating the TLS/SSL Termination (SSL Bridging)

1. To configure SSL bridging (SSL with re-encryption to the backend) follow the steps in Appliance Configuration for Meditech API – Using Layer 7 SNAT Mode (Scenario 2: Recommended Deployment Using SSL Bridging) and enable re-encrypt to backend on the VIP.

2. Ensure that the real servers have port 443 defined with an SSL certificate installed.

3. Next upload an SSL certificate to the load balancer as per the step above.

4. Then create an SSL termination as per the steps above.

5. The system overview page will display real servers with re-encrypt to backend padlock icon.

Finalizing the Configuration

To apply the new settings, HAProxy and STunnel must both be reloaded as follows:

1. Using the WebUI, navigate to: Maintenance > Restart Services.
2. Click Reload STunnel.
3. Click Reload HAProxy.

13. Testing & Verification

Note For additional general guidance please also refer to Testing Load Balanced Services.

Using System Overview
The System Overview can be viewed in the WebUI. It shows a graphical view of all VIPs & RIPs (i.e. the Meditech nodes) and shows the state/health of each server as well as the state of the cluster as a whole. The example below shows that all Meditech nodes are healthy and available to accept connections:

14. Technical Support
For more details about configuring the appliance and assistance with designing your deployment please don’t hesitate to contact the support team using the following email address: support@loadbalancer.org.

15. Further Documentation

16. Conclusion
Loadbalancer.org appliances provide a very cost effective solution for highly available load balanced Meditech RESTful API environments.
17. Appendix

Configuring HA - Adding a Secondary Appliance

Our recommended configuration is to use a clustered HA pair of load balancers to provide a highly available and resilient load balancing solution.

We recommend that the Primary appliance should be configured first, then the Secondary should be added. Once the Primary and Secondary are paired, all load balanced services configured on the Primary are automatically replicated to the Secondary over the network using SSH/SCP.

Note
For Enterprise Azure, the HA pair should be configured first. In Azure, when creating a VIP using an HA pair, 2 private IPs must be specified – one for the VIP when it’s active on the Primary and one for the VIP when it’s active on the Secondary. Configuring the HA pair first, enables both IPs to be specified when the VIP is created.

The clustered HA pair uses Heartbeat to determine the state of the other appliance. Should the active device (normally the Primary) suffer a failure, the passive device (normally the Secondary) will take over.

Note
A number of settings are not replicated as part of the Primary/Secondary pairing process and therefore must be manually configured on the Secondary appliance. These are listed by WebUI menu option in the table below:

<table>
<thead>
<tr>
<th>WebUI Main Menu Option</th>
<th>Sub Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Configuration</td>
<td>Hostname &amp; DNS</td>
<td>Hostname and DNS settings</td>
</tr>
<tr>
<td>Local Configuration</td>
<td>Network Interface Configuration</td>
<td>All network settings including IP address(es), bonding configuration and VLANs</td>
</tr>
<tr>
<td>Local Configuration</td>
<td>Routing</td>
<td>Routing configuration including default gateways and static routes</td>
</tr>
<tr>
<td>Local Configuration</td>
<td>System Date &amp; time</td>
<td>All time and date related settings</td>
</tr>
<tr>
<td>Local Configuration</td>
<td>Physical – Advanced Configuration</td>
<td>Various settings including Internet Proxy, Management Gateway, Firewall connection tracking table size, NIC offloading, SMTP relay, logging and Syslog Server</td>
</tr>
<tr>
<td>Local Configuration</td>
<td>Security</td>
<td>Appliance security settings</td>
</tr>
<tr>
<td>Local Configuration</td>
<td>SNMP Configuration</td>
<td>Appliance SNMP settings</td>
</tr>
<tr>
<td>Local Configuration</td>
<td>Graphing</td>
<td>Appliance graphing settings</td>
</tr>
<tr>
<td>Local Configuration</td>
<td>License Key</td>
<td>Appliance licensing</td>
</tr>
<tr>
<td>Maintenance</td>
<td>Software Updates</td>
<td>Appliance software update management</td>
</tr>
<tr>
<td>Maintenance</td>
<td>Firewall Script</td>
<td>Appliance firewall (iptables) configuration</td>
</tr>
<tr>
<td>Maintenance</td>
<td>Firewall Lockdown Wizard</td>
<td>Appliance management lockdown settings</td>
</tr>
</tbody>
</table>

To add a Secondary node - i.e. create a highly available clustered pair:
1. Deploy a second appliance that will be the Secondary and configure initial network settings.

2. Using the WebUI on the Primary appliance, navigate to: *Cluster Configuration > High-Availability Configuration.*

3. Specify the IP address and the *loadbalancer* user's password for the Secondary (peer) appliance as shown above.

4. Click *Add new node.*

5. The pairing process now commences as shown below:

6. Once complete, the following will be displayed on the Primary appliance:
7. To finalize the configuration, restart heartbeat and any other services as prompted in the blue message box at the top of the screen.

**Note**
Clicking the **Restart Heartbeat** button on the Primary appliance will also automatically restart heartbeat on the Secondary appliance.

**Note**
For more details on configuring HA with 2 appliances, please refer to [Appliance Clustering for HA](Appliance Clustering for HA).
## 18. Document Revision History

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Change</th>
<th>Reason for Change</th>
<th>Changed By</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0.0</td>
<td>1 October 2019</td>
<td>Initial version</td>
<td></td>
<td>IG</td>
</tr>
<tr>
<td>1.0.1</td>
<td>11 February 2021</td>
<td>New title page</td>
<td>Branding update</td>
<td>AH</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Updated Canadian contact details</td>
<td>Change to Canadian contact details</td>
<td></td>
</tr>
<tr>
<td>1.1.0</td>
<td>1 December 2021</td>
<td>Converted the document to AsciiDoc</td>
<td>Move to new documentation system</td>
<td>AH, RJC, ZAC</td>
</tr>
</tbody>
</table>
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