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1. About this Guide

This guide details the steps required to configure a load balanced Epic EHR environment utilizing Loadbalancer.org appliances. It covers the configuration of the load balancers and also any Epic EHR 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 Epic EHR. 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

- V8.6.1 and later

Note: The screenshots used throughout this document aim to track the latest Loadbalancer.org software version. If using an older software version, note that the screenshots presented here may not match the WebUI exactly.

4. Epic EHR Software Versions Supported

- Epic EHR – all versions

5. Epic EHR

The Epic EHR (Electronic Health Records) software suite brings together essential tools for clinicians and patients in the healthcare space.

Epic Hyperspace is a clinician-facing platform. It's a front-end client used to access most parts of the Epic software suite, including patient charts, prescribing, and even print services.

Epic MyChart is a patient-facing web portal. It gives patients the ability to view their medical records and test results, manage their appointments and prescriptions, and more.

6. Load Balancing Epic EHR

Note: It's highly recommended that you have a working Epic EHR environment first before implementing the load balancer.

Persistence (aka Server Affinity)

The Epic EHR applications require sessions to stick to the same real server. Source IP address affinity is used to achieve this.
Virtual Service (VIP) Requirements
To provide load balancing and HA for Epic EHR, the following VIPs are required:

- Hyperspace
- Hyperspace redirect (to force inbound HTTP traffic to use HTTPS)

 Optionally, additional VIPs may be required as follows:

- MyChart
- MyChart redirect (to force inbound HTTP traffic to use HTTPS)

Port Requirements
The following table shows the ports that are load balanced:

<table>
<thead>
<tr>
<th>Port</th>
<th>Protocols</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>80</td>
<td>TCP/HTTP</td>
<td>Redirect to HTTPS (not strictly load balanced)</td>
</tr>
<tr>
<td>443</td>
<td>TCP/HTTPS</td>
<td>Web Services</td>
</tr>
</tbody>
</table>

7. Deployment Concept

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 the section Configuring HA - Adding a Secondary Appliance in the appendix for more details on configuring a clustered pair.

8. Loadbalancer.org Appliance – the Basics
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>
To change the password, use the WebUI menu option: *Maintenance > Passwords.*

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

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, simply click **Dismiss**.

**Main Menu Options**

**System Overview** - Displays a graphical summary of all VIPs, RIPS and key appliance statistics
Local Configuration - Configure local host settings such as IP address, DNS, system time etc.
Cluster Configuration - Configure load balanced services such as VIPs & RIPS
Maintenance - Perform maintenance tasks such as service restarts and taking backups
View Configuration - Display the saved appliance configuration settings
Reports - View various appliance reports & graphs
Logs - View various appliance logs
Support - Create a support download, contact the support team & access useful links
Live Chat - Start a live chat session with one of our Support Engineers

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 the section Configuring HA - Adding a Secondary Appliance of the appendix.

9. Appliance Configuration for Epic EHR

Configuring VIP 1 – Hyperspace

Configuring the Virtual Service (VIP)
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. Hyperspace.
3. Set the Virtual Service IP Address field to the required IP address, e.g. 192.168.85.150.
4. Set the Ports field to 443.
5. Set the Layer 7 Protocol to TCP Mode.
6. Click Update to create the virtual service.

7. Click Modify next to the newly created VIP.
8. In the Persistence section click Advanced to expand the menu.
9. Set Timeout to 60 (the default units are minutes).
10. Click Update.
Defining the Real Servers (RIPs)

1. Using the web user interface, navigate to Cluster Configuration > Layer 7 – Real Servers and click on Add a new Real Server next to the newly created VIP.
2. Define the Label for the real server as required, e.g. Hyperspace_Srv_1.
3. Set the Real Server IP Address field to the required IP address, e.g. 192.168.85.200.
4. Click Update.
5. Repeat these steps to add additional servers as required.

Configuring VIP 2 – Hyperspace Redirect

Configuring the Virtual Service (VIP)

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. Hyperspace_redirect.
3. Set the Virtual Service IP Address field to the same IP address used for the Hyperspace VIP, e.g. 192.168.85.150.
4. Set the Ports field to 80.
5. Set the Layer 7 Protocol to HTTP Mode.
6. Click Update to create the virtual service.
7. Click Modify next to the newly created VIP.
8. In the Other section click Advanced to expand the menu.
9. Set Force to HTTPS to Yes.
10. Click Update.

---

**Configuring VIP 3 – MyChart (Optional)**

**Configuring the Virtual Service (VIP)**

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. MyChart.
3. Set the Virtual Service IP Address field to the required IP address, e.g. 192.168.85.151.
4. Set the Ports field to 443.
5. Set the Layer 7 Protocol to TCP Mode.
6. Click Update to create the virtual service.
7. Click **Modify** next to the newly created VIP.

8. In the **Persistence** section click **Advanced** to expand the menu.

9. Set **Timeout** to 60 (the default units are minutes).

10. Click **Update**.

---

### Defining the Real Servers (RIPs)

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

2. Define the **Label** for the real server as required, e.g. **MyChart_Srv_1**.

3. Set the **Real Server IP Address** field to the required IP address, e.g. **192.168.85.210**.

4. Click **Update**.

5. Repeat these steps to add additional servers as required.
Configuring VIP 4 – MyChart Redirect (Optional)

Note
If the optional MyChart VIP has been configured then this redirect VIP must also be configured to ensure proper operation of the load balanced MyChart service.

Configuring the Virtual Service (VIP)
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. MyChart_redirect.
3. Set the Virtual Service IP Address field to the same IP address used for the MyChart VIP, e.g. 192.168.85.151.
4. Set the Ports field to 80.
5. Set the Layer 7 Protocol to HTTP Mode.
6. Click Update to create the virtual service.

7. Click Modify next to the newly created VIP.
8. In the Other section click Advanced to expand the menu.
9. Set Force to HTTPS to Yes.
10. Click Update.

Finalizing the Configuration
To apply the new settings, HAProxy must be reloaded. This can be done using the button in the blue box at the top of the screen or by using the Restart Services menu option:

1. Using the WebUI, navigate to: Maintenance > Restart Services.
2. Click Reload HAProxy.
10. 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 Hyperspace and MyChart servers) 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 servers of both services are healthy and available to accept connections:

11. 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.

12. Further Documentation


13. Conclusion

Loadbalancer.org appliances provide a very cost effective solution for highly available load balanced Epic EHR environments.
14. 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**.
15. 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>22 February 2022</td>
<td>Initial version</td>
<td></td>
<td>AH</td>
</tr>
</tbody>
</table>
About Loadbalancer.org

Loadbalancer.org's mission is to ensure that its clients' businesses are never interrupted. The load balancer experts ask the right questions to get to the heart of what matters, bringing a depth of understanding to each deployment. Experience enables Loadbalancer.org engineers to design less complex, unbreakable solutions - and to provide exceptional personalized support.

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