JADE

Bp Premier ProMedicus
Conversion Guide

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Intended for usage with Bp Premier version Jade SP2 and later. Some features in this User Manual may be available only in versions later than Jade.

Conversion Checklist

Converting your data from one software package to another can be a daunting process. To facilitate a smooth transition to Bp Premier, the practice should prepare for both the Trial and Live conversions.

The Conversion Checklist below provides a summary of the steps involved when performing a trial and then live conversion. Read this checklist in conjunction with the detailed instructions for your clinical package to gain an overview of the conversion process.

IMPORTANT To mitigate issues, Best Practice Software insists that all sites perform a trial conversion **at least 2 weeks prior** to the expected Go Live date.

How to get assistance

Best Practice Software provide a conversion utility free of charge to enable you to convert your data to Bp Premier. The conversion process would be performed by your own staff or your IT technician. General Products Support will provide as much assistance as possible via phone on 1300 40 1111 or email support@bpsoftware.net.

The Best Practice Forum on our website **www.bpsoftware.net** is an invaluable source of information, advice, views, ideas, questions and answers from hundreds of Bp Premier users across Australia. Click on **Register** in the menu at the top to join.

To access the online knowledge base for Bp Premier, select Help > Online from inside the software.

Obtain a trial licence

Contact our relationship support team on 1300 40 1111 for a quote to install Bp Premier. You can obtain a free trial licence to evaluate the software before purchase.

Go to **www.bpsoftware.net** and select **Learning** to see the training options available for Bp Premier.

Trial conversion

To run the trial and live conversion, you will need a spare computer referred to as the conversion machine. You cannot use your practice's current live database for a trial or live conversion.

1. Confirm your server PC and network meet the hardware, hard disk space and operating system requirements.
2. Contact Best Practice Software support to obtain the required conversion utility, matching Bp Premier version and free trial licence.
3. Ensure the pre-converted data in the original software database is in good condition.
4. Back up the original practice management software database.
5. Install the original practice management software on your conversion machine and restore the backup you just made to this installation.

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6. Install the version of Bp Premier obtained from Best Practice Software on a conversion machine as a **Server** installation. This computer can be the same machine as in step 5.

7. Run the conversion utility on the conversion machine and follow the prompts.

8. Check data in the trial Bp Premier database thoroughly to ensure that all data converted correctly.

IMPORTANT   Best Practice Software recommends that the principal doctors perform a thorough check of as many patient records as possible to ensure that all data is present and accessible. We suggest opening a range of patients in your current application (long term, medium term, and new patients) and comparing the data with this same patient in Bp Premier. We also recommend checking the last patient seen before the conversion to ensure that the most recent data has been converted.

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9. Complete, sign, and fax or email the form *BP_FAQ-Trial Conversion completion form* to General Products Support on +61 7 4153 2093. Email the file *BPSConversion.log* to support@bpsoftware.net. This file can be found in the folder you installed the conversion utility in.

10. Best Practice Software Support will contact you with your 30 day activation licence key.

Live conversion

Carry out the following steps if you have successfully performed a trial conversion with no issues, and have confirmed the most recent data has been converted.

1. Ensure you have your invoice and 30 day activation licence key. If you have not received your licence key after submitting your Trial Conversion completion form, contact Best Practice Software support.

2. Compare the drug database date in Bp Premier (**Help** > **About**) with the most recent drug database update from **www.bpsoftware.net**. If your installation does not have the most recent drug database, download and install an incremental or comprehensive update.

3. On conversion day, perform a complete backup of the old practice management system and database, including any components specific to that software package, such as MD3 ManageEzy documents.

4. Install the conversion utility on the conversion machine. Run the conversion utility.

5. Enter the 30 day activation key when prompted. This will convert your trial version of Bp Premier to a licensed version.

6. Install the latest version of Bp Premier as a **server** on your live server. This is the server that will be used during daily operation.

7. Install the latest version of Bp Premier as a **client** installation on all workstations.

8. Open Bp Premier on each workstation and connect to the Bp Premier server.

Post-conversion check

1. Check ALL data carefully to ensure that conversion has been successful. Access the last patient updated in the old system prior to the conversion to ensure the visit record is present.

2. Set up practice details and ensure that the licence key is for the correct number of users. Ensure that only valid locations are displayed in practice details.

3. Review user permissions and reset user passwords. Ensure one trusted user has full permissions, and that the password for this user is secured in a fireproof safe for emergency access.

4. Back up the converted live data from your conversion machine.
5. Restore the converted data to your live Bp Premier server.
6. Disable all shortcuts to the old software to ensure staff can't accidentally use the wrong system.
7. Have each user log into their Bp Premier workstation and configure their printer settings and preferences.
8. Undertake training for staff new to Bp Premier.

Converting from ProMedicus

The following instructions describe how to convert data from ProMedicus practice management software. Read the checklist summary in Conversion Checklist on page 3 before following the instructions.

1. Read all documentation

To assist you in the conversion process, we have provided comprehensive documentation to guide you through the steps required such as installing the Bp Premier product, performing a trial conversion, checking the converted data, configuring your system and then going live with the software in your practice.

2. Check prerequisites

Obtain up-to-date version of Bp Premier

Please check with Best Practice support via phone on 1300 40 1111 or email support@bpsoftware.net.

NOTE If an (old) previous installation of Bp Premier is present on the server, you should either upgrade to the latest version or uninstall completely and reinstall if the version is too old to upgrade.

Obtain latest conversion utility

Please check with Best Practice support via phone on 1300 40 1111 or email support@bpsoftware.net prior to running the conversion to ensure that you have the most update to date ProMed Conversion utility to use.

Confirm Hardware Requirements

Ensure all machines that will run Bp Premier meet the System Requirements.

Confirm Hard Disk space

By default, Bp Premier program files and databases are installed to the C:\ drive. It is recommended that prior to GO LIVE that an estimate of the disk space requirements is made to ensure that there is sufficient space on the server on the C:\ drive to cater for:

- Size of the Bp Premier databases (following the import of your clinical data)
- Sufficient room for expansion of the databases due to normal operation.

If **compressed** backups are to be performed, there will need to be free space approximately twice the size of the Bp Premier databases to allow for temporary files to be created during the backup process (i.e. 6 GB of databases will need approximately 18GB free space to perform compressed backups)

To check the size of the databases following the data import, check the size of the databases stored in the folders. These are the default locations. You may have installed your data to another folder during installation:

- **SQL Express 2008 Installations** - C:\Program Files\Microsoft SQL Server-\MSSQL10.BPSINSTANCE\MSSQL\DATA

- **SQL Express 2008R2 Installations** - C:\Program Files\Microsoft SQL Server\MSSQL10_50.BPSINSTANCE\MSSQL\DATA
- **SQL Express 2012 Installations** - C:\Program Files\Microsoft SQL Server\MSSQL11.BPSINSTANCE\MSSQL\DATA
- **SQL Express 2014 Installations** - C:\Program Files\Microsoft SQL Server\MSSQL12.BPSINSTANCE\MSSQL\DATA
- **SQL Express 2016 Installations** - C:\Program Files\Microsoft SQL Server\MSSQL14.BPSINSTANCE\MSSQL\DATA

3. Will staff require training?

Consider whether any staff will require training. You will find details on the training that Best Practice offer on our web site **www.bpsoftware.net/learning**.

4. Check data condition

Make sure your ProMed data is in the best possible condition 'BEFORE' converting to Bp Premier.

- Synchronise your data with any third party billing package
- Run any maintenance functions that might be required
- Ensure that there are no unallocated results and documents.

5. Perform a Trial Conversion

A Trial conversion must be performed a minimum of two weeks prior to the date you wish to go live with Bp Premier. If you are unsure how to perform any of the processes, contact your IT technician for assistance.

Why a trial conversion?

- To ensure that the source data converts successfully and correctly
- To resolve any issues related to the conversion prior to the GO LIVE
- To allow you to understand the process and identify the time required to complete the conversion
- To ensure that Bp Premier meets your surgery's clinical and / or management requirements prior to purchase.

IMPORTANT When running the conversion on a virtual machine, the utility must be executed through a console connection, for example, TeamViewer, LogMeIn.

Start trial conversion

1. Ensure that you have read all the documentation and have addressed all the Prerequisites listed at the beginning of this document.

2. Identify a secondary computer that can be used for the conversion machine:
    - Must meet System Requirements.
    - Must also meet the hardware requirements recommended for ProMed.
    - Check that the hard drive (c:\ drive) on the conversion machine has free space equal to at least 2.5 times the size of the ProMed uncompressed backup. A Solid State Drive with high read and write speeds is recommended.

3. Ensure that the live version of ProMed is closed on all workstations and the server.

4. Backup your ProMed data as per the recommended method. Ensure that documents are included in the backup if they are stored outside of the database.

5. Install ProMedicus on the conversion machine and restore the latest backup

    - Install ProMedicus as per the recommended method
    - Restore the ProMedicus backup made above including your documents.
    - Install a Firebird ODBC driver
    - Identify the location of the ProMedicus .GDB databse (i.e. c:\promeddata\)

6. Restore the ProMed backup taken above. Make a note of the name of the instance and the location of the documents folder (if stored outside of the database).

7. Install Bp Premier as a **Server** installation on your conversion machine.
    - A reboot may be required at the end of the installation
    - If using a **Terminal Server**, you must always install applications & updates via Add/Remove Programs

8. Check that the drug database date in Best Practice is up to date. Check this against the Best Practice Software website www.bpsoftware.net/resources/bp-premier-downloads/ and download and install any more recent data updates. See Updating the drug database for more information.

TIP To check the drug (data) database version you are currently using, log into Bp Premier on the server and select **Help** > **About**.

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9. Ensure that the machine does not have any scheduled tasks that could affect the performance of the machine or the network (i.e. scheduled backups, router reboots, server reboots, windows updates, etc).

10. Turn off any background processes such as results importing, backups, etc.

11. Install the ProMed conversion utility. This will put an Icon on the desktop.

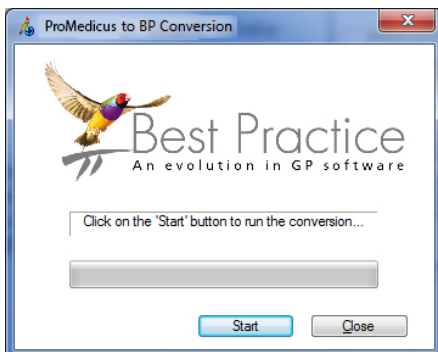12. Double click on the ProMed conversion icon to start the conversion.

Conversion instructions

1. The **ProMedicus to BP Conversion** screen will appear providing a brief overview on the conversion, please read the overview. Click **Continue** to proceed with the conversion.
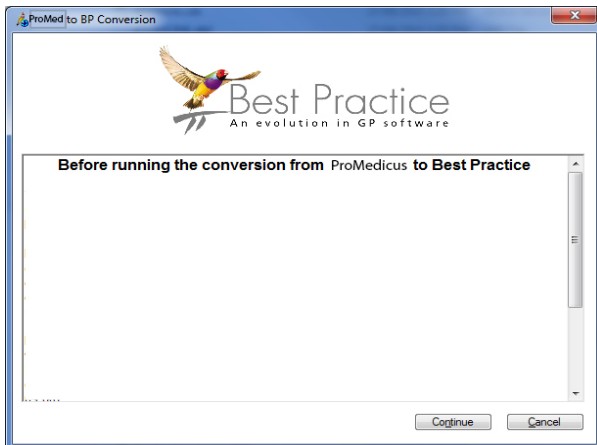
2. The **Start** screen will appear. Click **Start** to continue with the conversion.


3. The system will now ask for the location your ProMedicus data. This will be the folder that the database files with the extension .GDB reside in. Click **Ok** to continue.

d. You will be prompted for your Best Practice Software licence details. As you are running a Trial conversion, tick the box **Evaluation only**. Click **Continue**.
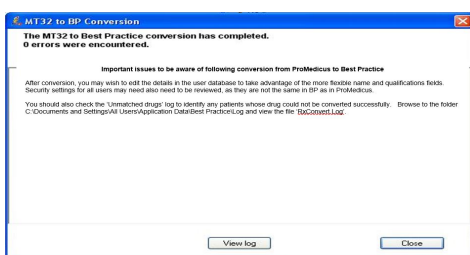
5. The conversion from ProMedicus to Bp Premier will now take place. Depending upon the size of the data this may take some time. Overall times can range from a few hours to 6 days with an average being 24 hours.

Complete trial conversion

A screen will appear to indicate that the conversion is complete and whether any errors were encountered. Check each log to confirm whether any errors occurred.
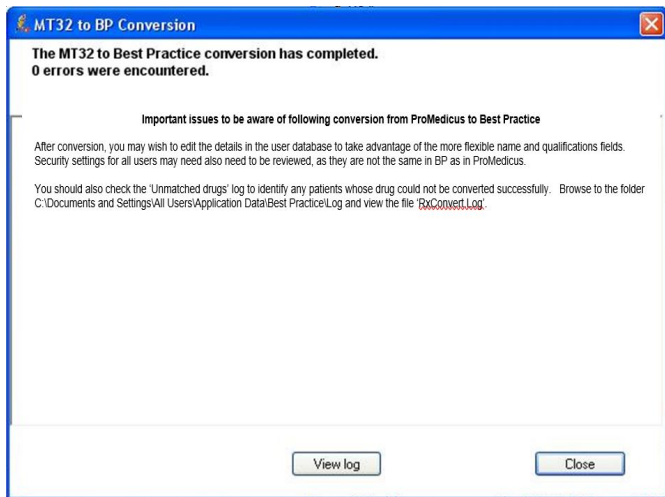
Conversion order

| Order that data is converted from ProMedicus		
1. Practice details	Immunisations	Measurements
2. Doctors	History	Pathology results
3. Patients	Past Prescriptions	Requests
4. Next of Kin	Autotext	Reminders
5. Clinical / Social history	Pregnancies	Categories
6. Reactions	Past prescriptions	Address book
7. Progress Notes	Pregnancies	Letters
8. Current RX	Clinical details	Documents

IMPORTANT Financial data is not converted.

Before continuing any further:

1. Close the **Conversion complete** screen.
2. Browse to the folder **C:\Program Files\Best Practice Software\BPS**
3. Run the file called **Attach databases.EXE**. The **Attach databases** screen will appear .
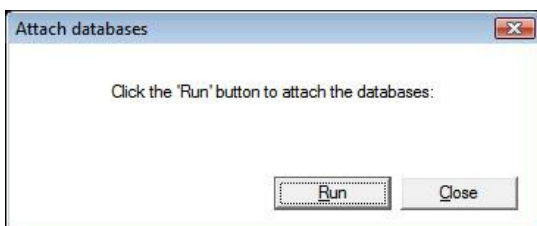
4. Click the **Run** button to continue. The Attach database process can take from 1–15 minutes depending upon the number of document databases. When complete a screen will appear showing all the databases that have been affected. Click **Ok** to close this screen.

6. What to check

Check conversion logs

After performing a Trial conversion, please check the log files generated during the conversion process. These will be found in the folder 'C:\Documents and Settings\All Users\Application Data\Best Practice\Log' or 'C:\ProgramData\Best Practice\Log' (depending on the windows version). There will be a number of files such as BPSConversion.log, UnmatchedCurrentRx, UnmatchedPrescriptions, etc.

IMPORTANT It is important to check these logs carefully to identify what could not be converted and ensure that there have been no errors recorded during the conversion that need to be addressed.

IMPORTANT Best Practice Software recommends that the principal doctors perform a thorough check of as many patient files as possible to ensure that data is present and accessible. Open a range of new to long term patients from your current software application and compare that the same data is available in Bp Premier. Also check that the last patient seen before the conversion has been transferred over correctly.

Check data

Patient demographics correct	Correspondence In and Out present and accessible
Past Visit records present and accessible	Reminders present, correct and accessible
Current and Past RX are present and correct	Autotext present and accessible
Investigation results present and accessible	Custom Templates present and correct
Immunisation records present and accessible	Contacts address book correct
Reminders	Appointments

Prepare Go Live plan

Now that your Bp Premier system contains your clinic data, prepare your GO LIVE plan.

TIP Best Practice Software recommended that you identify any configuration options or preferences that are required to set up the system so that decisions can be made within the practice prior to GO LIVE. Any settings made in the Trial conversion data will be overwritten when you perform the Live conversion. Remember to make note of all the settings you decide upon so they can be quickly re-entered after the Live conversion.

Submit logs and conversion form

When you are confident that all the data has been converted correctly:

1. **Email all the log files** generated from the latest trial conversion to support@bpsoftware.net and the Best Practice Software Support team member who is assisting you with your conversion. Include your contact details and the practice name.
2. Once both of these have been received, we will issue your practice a Site ID and a **30 day key and invoice** to enable you to perform a LIVE conversion. This will be emailed to the email address for the main contact on the Trial Conversion completion form.

Obtain licence key

Shortly after you submit the conversion log and completion form to Best Practice Software you will be issued with an invoice and 30 day licence key. If you have not received your licence key and are ready to start the Live conversion, please contact General Products Support to check on the progress of your application.

7. Start Live Conversion

Once the Trial Conversion process is completed and you have received the 30 day key and invoice, you can perform a LIVE conversion.

1. Update the conversion machine to the latest drug database update identified during the trial conversion. Check the Best Practice Software website bp-premier-downloads to see if there are any newer data updates that need to be applied.
2. Commence the Live conversion following the same trial conversion steps.
3. When prompted for the site ID and licence key, enter details as per the email you would have received from Best Practice Software after submitting the Trial conversion information.

During conversion

1. Ensure the latest release of Bp Premier**server** version is installed on your live server. This is the Bp Premier server that will be used during daily operation.
2. Install the latest release of Bp Premier client (select **Client** when installing) on all workstations. Terminal server users can disregard workstation installation if the data is stored on the terminal server.
3. Open each client installation in turn. When prompted, select the Bp Premier server from the list of servers then close the application.

NOTE If the list of services box is not populated, check that no firewall hardware or software is blocking ports between server and workstations. A utility is available here to assist you in opening the required ports on your server machine.

When the conversion is complete

1. When the Live conversion is completed, **check ALL data carefully prior to going LIVE** to ensure that data has converted correctly.
    1. Check the BPSConversion.log file again to ensure there are no errors indicated.
    2. Perform another check of the data to ensure that all data is present and accessible. We suggest opening a range of patients in your current application (long term, medium term and new patients) and comparing the data with this same patient in Best Practice. We also recommend checking the last patient seen before the conversion to ensure that the most recent data has been converted.
    3. Ensure that only valid locations are displayed in **Setup** > **Practice details**.

Once you have confirmed that the conversion is complete and the data is correct:

1. If you have not already entered the licence key, do so now.
2. from your conversion machine and restore to your live server.
3. Work through your Go Live plan to set up the various areas that you will be using.

Set up Clinical module

If you are continuing to use a third party billing package you will need to configure the Link options with Best Practice.

Set up Management module

1. Log into ProMed and remove any links that existed to your third party billing package to eliminate any conflicts with Best Practice.
2. Ensure that you have turned off any result importing and background process in ProMed so that documents are not imported in the old application rather than Bp Premier.
3. Set up the management module.

NOTE All doctors should be made aware of the patients listed in any unmatched lists as they will need to correct the patient record when that patient is first seen.