Bp Premier Saffron SP2 Upgrade Checklist

About this Guide

This guide summarises the activities required to upgrade from any version of Bp Premier Summit or later to Saffron SP2. If you are upgrading from versions Summit, Lava, or Indigo, you will need to note updated system requirements. Use this brief guide in conjunction with the full **Bp Premier Saffron SP2 Upgrade Guide**.

To view the version you are on, select **Help** > **About** in Bp Premier.

If you are upgrading from Summit

Version Lava introduced adjustments, deposits, and write-offs to the management module, and new management reports to accommodate the database changes. Best Practice Software strongly recommend upgrading at the end of a disbursement or financial reporting period. The new management reports cannot be run on financial data recorded before the upgrade (you will need to use Historical reports instead).

If you are running version Lava, Indigo, or Jade, you can upgrade at any time outside of normal practice hours.

Information for IT service providers and practice managers

Large practices that have to upgrade multiple workstations can take advantage of Bp Premier silent installations. Instead of running the upgrade through the upgrade wizard, you create a configuration file, deploy the file to all upgrading computers, and run from the command line.

IMPORTANT Silent installations require experience with Windows batch files, the command line, and access to the C:\ drive.

System requirements

As of May 2021, system requirements for Bp Premier are:

Microsoft Windows

Version	Windows 8	Windows 8.1	Windows 10
Saffron SP2	✗	✓ See note	✓

NOTE Saffron SP2 can run on Windows 8.1, however, you must install this Windows 8.1 update before installing or upgrading to Saffron SP2.

Microsoft Windows Server

Version	Windows Server 2008 R2 SP1	Windows Server 2012	Windows Server 2012 R2	Windows Server 2016	Windows Server 2019
Saffron SP2	✗	✓	✓	✓	✓

Microsoft SQL Server

Version	SQL Server 2008 R2	SQLServer 2012	SQL Server 2014	SQL Server 2016	SQL Server 2017	SQL Server 2019
Saffron SP2	✗	✓	✓	✓	✓	✓

End of extended support

In 2017, Microsoft ended extended support for Windows XP, Windows Server 2003, and SQL Server 2005. In January 2020, Microsoft ended extended support for Windows 7, Windows Server 2008, and SQL Server 2008.

If you are running Bp Premier on an operating system or SQL Server version no longer supported by Microsoft, Best Practice Software strongly recommend upgrading before you upgrade to Bp Premier Saffron SP2. Your instance of Bp Premier will continue to run on unsupported versions. However, your operating system and database will no longer be receiving security patches or general updates from Microsoft.

This knowledge base article contains instructions on upgrading your version or edition of SQL Server. This Microsoft Support article provides more information on the Microsoft product lifecycle and extended support.

Steps to upgrade

Before you upgrade

Step	Upgrade item
1.	Back up your Bp Premier database. Best Practice Software also recommend testing that the backup restores successfully to a test (trial) server
2.	Synchronise any remote laptops with the Bp Premier database and log out.
3.	Log all users out of the server and all workstations

Step	Upgrade item
4.	Download the Saffron SP2 upgrade file and copy the file to the Bp Premier server and all workstations (remote and local), ready to run.
5.	Review the Saffron SP2 Release Notes.
6.	Download the most recent Data Update to the Bp Premier server and run the Data Update **NOTE** If you have installed the data update immediately prior to the most recent, you only need to install the incremental data update. If you are more than a month behind, install the comprehensive data update. If you have gone some time without running a data update, you may be asked to install an interim data update before you are able to install the most recent.

Upgrade

Step	Upgrade item
1.	Run the upgrade file on the Bp Premier server first. Select the 'Server' option at the start of upgrade.
2.	At the end of the upgrade, the Upgrade Wizard will show the **Setup third-party integrations** panel. Select any database integrations that your practice uses and proceed with the upgrade. This knowledge base article provides more information on the Bp Partner Network. If you are running a silent install, after the upgrade is complete, go to **Configuration** > **Setup** > **Database** > **Setup third-party integrations** and select the database integrations for your practice.
3.	Run the upgrade on each workstation immediately after the server upgrade. Select the 'Client' option at the start of upgrade. **IMPORTANT** Workstations that are not upgraded will be unable to access new features and may not be able to connect to the server.

After you upgrade

Step	Upgrade item
1.	If your practice links to billing software, or exchanges files between Bp Premier and other software, check that the linking is working as expected after the upgrade.
2.	If you did not select database integrations to enable during the upgrade process, go to **Setup** > **Database** > **Setup third-party integrations**, select the database integrations for your practice, and click **OK**. **IMPORTANT** All legacy database integrations, such as the BPSAppointments account, are disabled after upgrade to Saffron. You **must** enable the partner specific role for any third-party integrations your practice uses after upgrading, or these integrations will cease to function.
3.	Select **Management** > **Reports** to view all of the reports added in the latest program and data updates. You will have to grant access to any new reports to users that will be running those reports. Cloning another user's reports will make this process easier. This knowledge base article explains how.
4.	Review the new **user permissions** and **user preferences** described in the following tables. You will need to update your users' permissions to control access to new features. New permissions are normally disabled by default.
6.	Review the Known Issues for Saffron SP2 to see all issues resolved since Summit and any outstanding issues

Permissions, preferences and configuration settings

New user permissions

The following user permissions for new functionality have been added since Summit. Set permissions from **Setup** > **Users** > **Edit** > **Set permissions**. This knowledge base article provides more information about user permissions.

Permission	Description
Clinical Notes - Add / Edit	Restricts ability to delete clinical notes.
Bp Backup	Restricts ability to access the backup function
BDI	Restricts access to Bulk Document Importer. Previously controlled by Correspondence In.
HealthLink	Restricts access to HealthLink forms.
Printers	Restricts access to printer configuration.
Word Processor - Allow Clinical access	New option to allow access to clinical data in the Word Processor. The 'Allow' access level now restricts the user to non-clinical data only.
Subpoena Tool	Restricts access to the Subpoena Tool function.
Send Bp Comms Messages	Previously called 'Send SMS Messages'. Now restricts access to all Bp Comms messages.
Prescribe on behalf of	Restricts ability to nominate another provider to prescribe on behalf of in the New Rx function.
Medicare refunds	Restricts access to Medicare refund functionality.
PRODA setup	Restricts access to the PRODA section in Setup > Configuration.

New user preferences

The following user preferences have been added since Summit. Set user preferences from Setup > Preferences. This knowledge base article provides more information about user preferences.

Preference	Description
Clinical > Usual visit type	Set the Default Visit type.

Preference	Description
Letters > Default address book	Set the default online directory to use (HealthLink, HealthShare, or local contacts).
Prescribing > Enable real-time prescription monitoring	Enable real-time prescription monitoring for this provider.
General > Resize patient photo if larger than	Resize a patient photo if larger than the specified dimensions.
Clone	You can now clone the preferences of an existing user.
General > Enable NCSR functionality	Set National Cancer Screening Register (NCSR) use at an individual level.

New configuration settings

The following configuration settings have been added since Summit. You may need to turn on settings to access new functionality in **Setup** > **Configuration**.

Configuration Option	Description
Billing > Check the Credit Payments box when reversing payments	Sets the default for the **Credit payments...** checkbox when payments are reversed, indicating how refunds should be credited. This knowledge base article provides more information.
Appointments > Show Invoiced and Paid Status	Displays appointments with the new Invoiced and Paid statuses. This knowledge base article explains the appointment book statuses.
Appointments > Display record number on appointment	Displays the patient's record number in bookings
Reminders > Reminder reason > Clinically significant	Indicates the reminder is clinically significant. This knowledge base article explains what this option might mean for your practice.
Bp Comms	New tab for setting up Bp Comms messaging. Previously SMS reminders were set up from the Appointments tab.

Configuration Option	Description
Appointment Reminders > Configure replies	Can now specify custom reply messages instead of the default 'Yes' or 'No'. This knowledge base article describes how.
Msg Queue	New tab for setting up the Bp Messaging Service, required for Bp Comms.
Database > Backup drug database at the end of a data update	Backs up the drug database automatically after running a monthly data update. This knowledge base article provides more information.
Templates	New tab for the maintenance of all message templates. This knowledge base article describes how to set up Bp Comms templates.
Bp Service	New tab for managing Bp Service, which replaced Bp Link in version Lava. This knowledge base article provides more information on switching to Bp Service for practices running older versions.
FHIR	New tab for managing third party access to Bp Premier via FHIR. This knowledge base article provides more information on FHIR connections.
General > Enable National Cancer Screening Registry Integration	Allows users to download the National Cancer Screening Registry (NCSR) integration. This knowledge base article provides more information in setting up NCSR integration
Security	New tab for configuring security settings. This knowledge base article describes the new security settings available
General > Enable ePrescriptions	Enables the use of electronic prescriptions, or eScripts, at the practice. This knowledge base article provides more information about setting up eScripts.
General > Online Directory for Contacts, Online Directory for Messaging Provider	Online Directory for contacts enables an online directory to be selected. Online Directory Messaging Provider enables a messaging provider to use when sending messages to members of the online directory to be selected. This knowledge base article provides more information.
General > Import certificates	New drop-down menu for selecting a location to import a NASH certificate for. This knowledge base article provides more information.

Configuration Option	Description
General > Max document database size	New drop down menu for selecting the Max document database size. This knowledge base article provides more information.
PRODA	New tab for managing connection to Medicare Web Services via PRODA. This knowledge base article provides more information.
Bp Service > Use Bp Service for automatically deploying the data update.	Select this option and click Configure Data Update to set up data updates to download and apply automatically. This knowledge base article provides more information.
Lists > Configure visit types	You can now remove items from the visit types list. This knowledge base article provides more information.