JADE

Bp Premier

First in GP Software

Bp Premier Genie 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.

Bp Premier Knowledge Base

The Bp Premier Knowledge Base is the primary tool for Bp Premier users to obtain self-help. This document contains instructions that suggest searching the Bp Premier Knowledge Base for specific topics. To search for a topic on the Bp Premier Knowledge Base:

1. From the software, select Online > Help. The online knowledge base will open in your default browser.
2. In the **What are you searching for?** input at the top of the page type the name of the topic.
3. Press **Enter**.

Before you begin

The following information describes the required resources and steps to take before converting your clinical data to Bp Premier.

1. Staff training

Consider whether any staff require training. You can find details on the training that Best Practice offers on our web site.

2. Check Hardware requirements

1. All machines must meet the system requirements. Search for **System Requirements** on the Bp Premier Knowledge Base.
2. Check the size of your Genie backup.
   a. If the size of the backup exceeds 8 GB consider upgrading your edition of SQL Server. Consult with Best Practice support via phone on 1300 40 1111 or email support@bpsoftware.net for more information.
   b. If the size of the backup exceeds or is close to the free space available on your server hard drive, upgrade to a larger capacity hard drive. When performing a Bp Premier backup with **compression** then free space twice the size of the backup is required.

3. Nominate a conversion machine

A high specification machine is required. This machine must:

- Meet the System Requirements.
- Have sufficient free hard drive space. Check the size of your Genie backup and multiply by 2.5 to calculate the required size. For example, if your backup size is 7 GB, then 17.5 GB of free space is required.
- Have internet access to allow installation of the conversion utility.

4. Install Bp Premier

Install the latest version of Bp Premier on to your conversion machine. The latest version of Bp Premier is available from the downloads page under the **Program Updates** section. .

Ensure the drug database is up to date by navigating to **Help** > **About** from within Bp Premier. Check the **Data Updates** section of the downloads page, download and install any newer updates.

6. Check data condition

Ensure that your Genie data is in the best possible condition before converting to Bp Premier.

- Upload any remote data to the server.
- 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 in the holding file.

7. Move Genie data to your conversion machine.

The conversion process requires you to export XML files from Genie. These files will then be copied to your conversion machine and imported by the Bp Premier Conversion Tool.

1. Open Genie and navigate to **File** > **Maintenance** > **Reports**.
2. Choose the **Administrator** tab and click **XML Export**.
3. Select where to save the Genie XML files.

XML files that will be converted		
Practicepreference.xml	Pasthistory.xml	Outgoingletter.xml
Preference.xml	Currentproblem.xml	Incomingletter.xml
Patient.xml	Addressbook.xml	Graphic.xml
Measurement.xml	Macro.xml	Document.xmls
Investigation.xml	Recall.xml	Scriptarchive.xml
Allergy.xml	Obstetichistory.xml	Writetemplate.xml
Prescription.xml	Pregnancy.xml	Letterhead.xml
Drugindex.xml	Antenatal.xml	Referral.xml
Consult.xml	Downloadedresult.xml	Hoacirtransmission.xml
Consultationproblem.xml	Atomicresult.xml	Vaccination.xml
Loinccode.xml		

4. Copy the XML files to your conversion machine.
5. Locate the Genie image folder and copy to your conversion machine. Contact Genie support if you require help to find the image folder.
6. Note the path you copied your XML files and image folder to as these will be required later.

Install the Bp Premier Conversion Tool

Install the **Bp Premier conversion utility** on your conversion machine .

1. Download the conversion utility installation here. Best Practice recommends using Google Chrome when installing this utility.
2. Double-click the downloaded file. The **Application Install** screen appears.
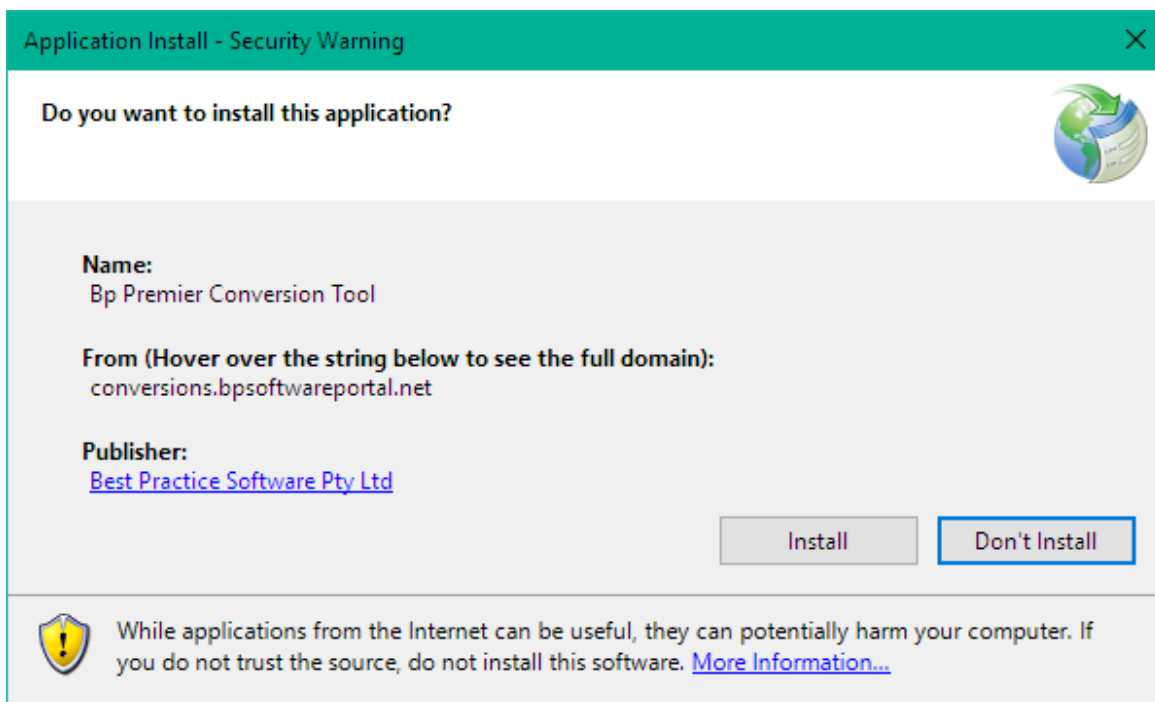
3. Click **Install**. The conversion utility is downloaded and installed.
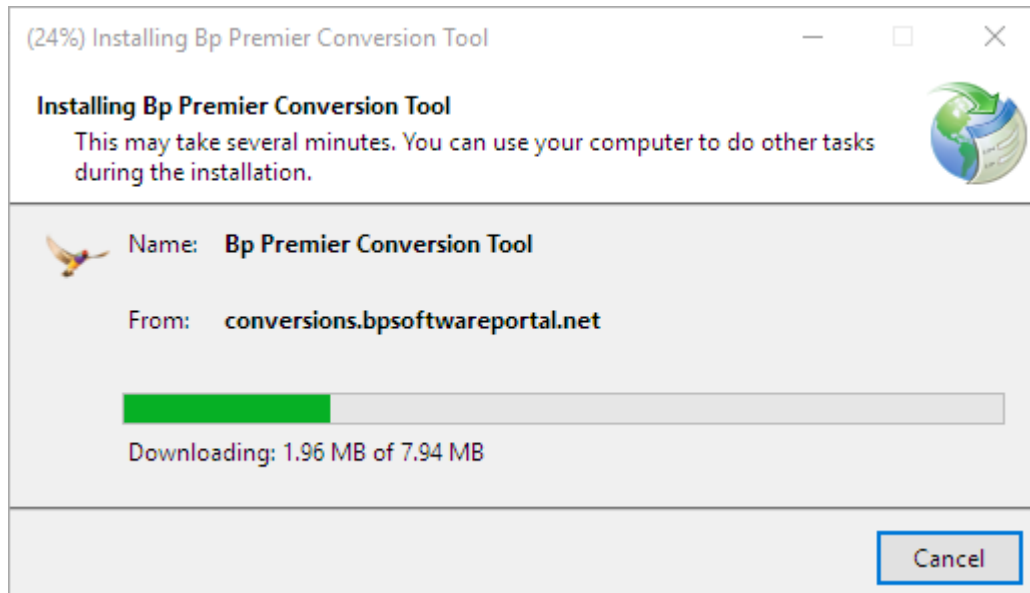
4. The **Bp Premier Conversion Tool** splash screen appears. An icon named **Bp Premier Conversion Tool** is also present on your desktop.
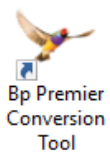
You can now perform a trial conversion.

Converting your clinical data

A **trial conversion** must be performed to ensure the conversion can complete successfully. When the **trial conversion** has completed successfully, then a **live conversion** can be performed. Both the trial and live conversions are done on your conversion machine.

Perform a trial conversion

Follow the steps in the Conversion process below section to test the conversion of your data.

Conversion process

1. Reboot your conversion machine. This ensures that unnecessary applications are closed, and as much memory as possible is available to the conversion tool.
2. Double-click the **Bp Premier Conversion Tool** icon on your desktop. If there are updates to the conversion tool, they are downloaded and installed automatically.
3. On the **Bp Premier Conversion Tool** screen, click the **Open Bp Conversion Wizard** button, the **Bp Premier Conversion Wizard** appears.

4. Enter the following on the **Welcome** screen.

Field	Description
Source	Genie
XML Export Path	Browse to your Genie XML file directory. This path was noted in **Move Genie data to your conversion machine** in the **Before you begin** section.
Load Data Into	Bp Premier
Target Server Name	(local)\BPSINSTANCE
Conversion Type	Select **Replace** if you are converting into a blank copy of Bp Premier. If you are converting into an existing database or configuring your copy of Bp Premier before the conversion, you will need to restore a pre-conversion backup before running the tool and select **Append**.

Click **Next.**

5. The **Data Selection** screen allows you to limit the size of items that are transferred during the conversion. Large images, documents or letters may cause problems in the conversion procedure. If you want to limit the size of items that are converted, check the **Only convert attachments under the size of (Mb)** check box and enter a limit. Click **Next**.

6. The **Staging** screen begins work to convert your data. When this process is complete, click **Next**.

7. On the **Scoping** screen, you can select the **Patients**, **Users** and **Contacts** to convert. All are selected by default. Check or uncheck an item to include or exclude it from the conversion process.

Selected	External Patient ID	Name	Date of Birth
☑	21	Mrs Penny ANDERSON	4/07/1993
☑	23	Mrs Maureen ANDREWS	23/06/1923
☐	31	Mrs Jennifer ANDREWS	20/04/1970

If there are existing users in your Bp Premier database, the **Users** tab allows you to map a user from your Genie data to a user in your Bp Premier data. Mapping users improves the quality of your data. To map a user:

a. Select the **Users** tab.

b. Identify the user to map and click the corresponding **Map User...** button, the **Please select a user to map to** appears.

c. Select the user to map to in the **Target Users** drop down. Click **OK**.

Please select a user to map to Dr A Practitioner ...

Target Users	Dr A Practitioner
Selected User	Dr A Practitioner
Provider No	2426621B
Prescriber No	2173711
Address	

OK   Cancel

When you have chosen which items to convert, click **Next**.

8. The **Duplicates** screen displays **Patients** and **Contacts** from your Genie data that match existing data in your Bp Premier database. Each row contains a single match: the left side of the list displays the source data; the right side of the list displays the target data. Review the list and if you want to merge the data between Genie and Bp Premier ensure that the appropriate check box is selected. If the item is not checked, then a duplicate is added.

Use newest data	The newest data from either Bp Premier or Genie is used.
Use target system data	The data from Bp Premier is used.
Use source system data	The data from Genie is used.

NOTE It is essential to merge pathology contacts, so they do not duplicate on the laboratory preferences screen in Bp Premier. The pathology contacts appear first in the **Contacts** list of merge items.

Click **Next**.

9. The **Begin Load** screen displays a summary of the conversion actions. Review the summary and click **Next** when ready.
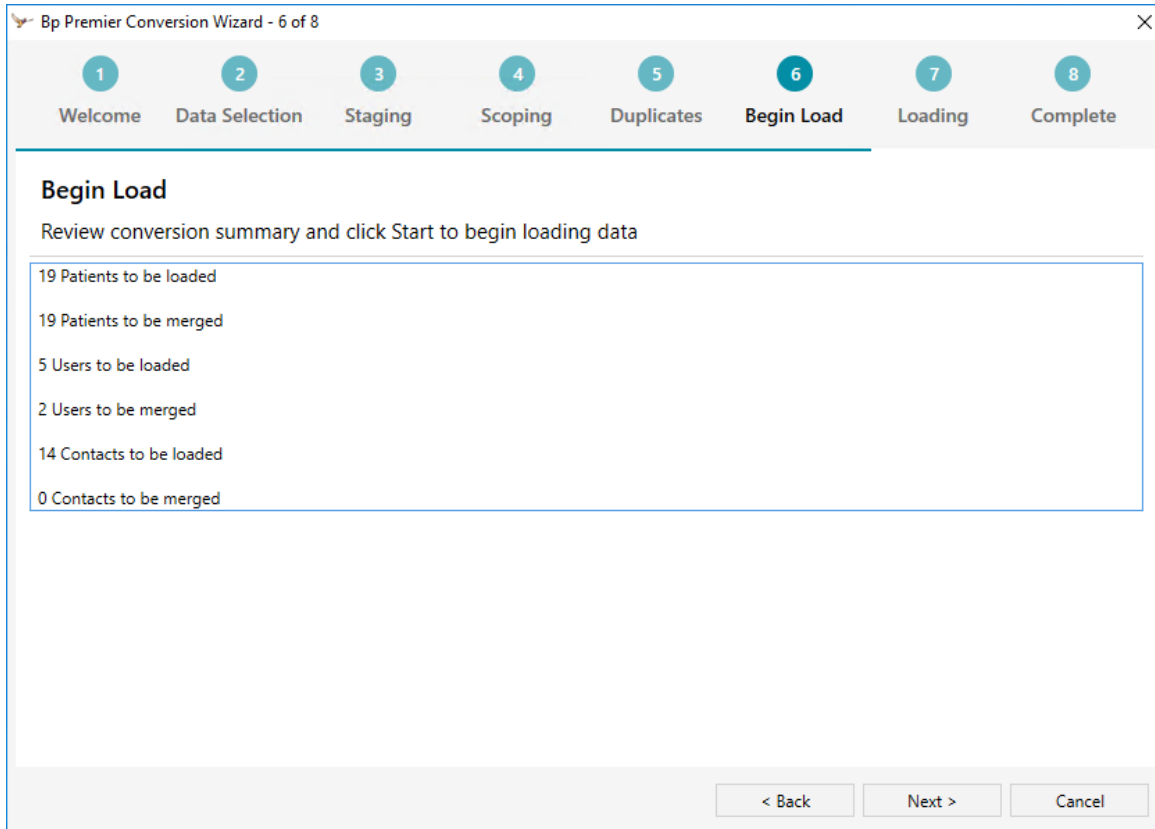
10. The **Loading** screen completes the remainder of the conversion process. This step takes some time to complete depending upon how much data is converted. Click the **Next** button when the **Loading** step completes.
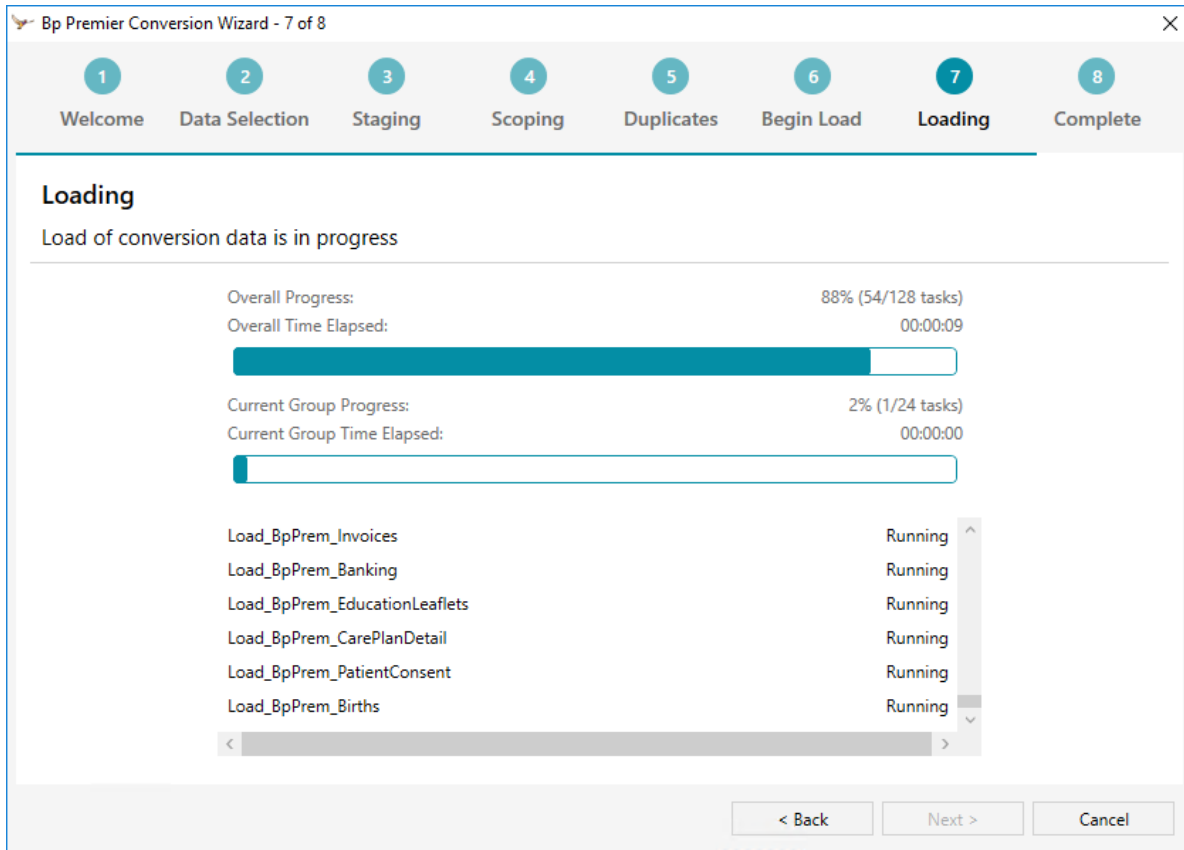
11. The **Complete** screen displays a summary of the conversion process. Click **Finish**.
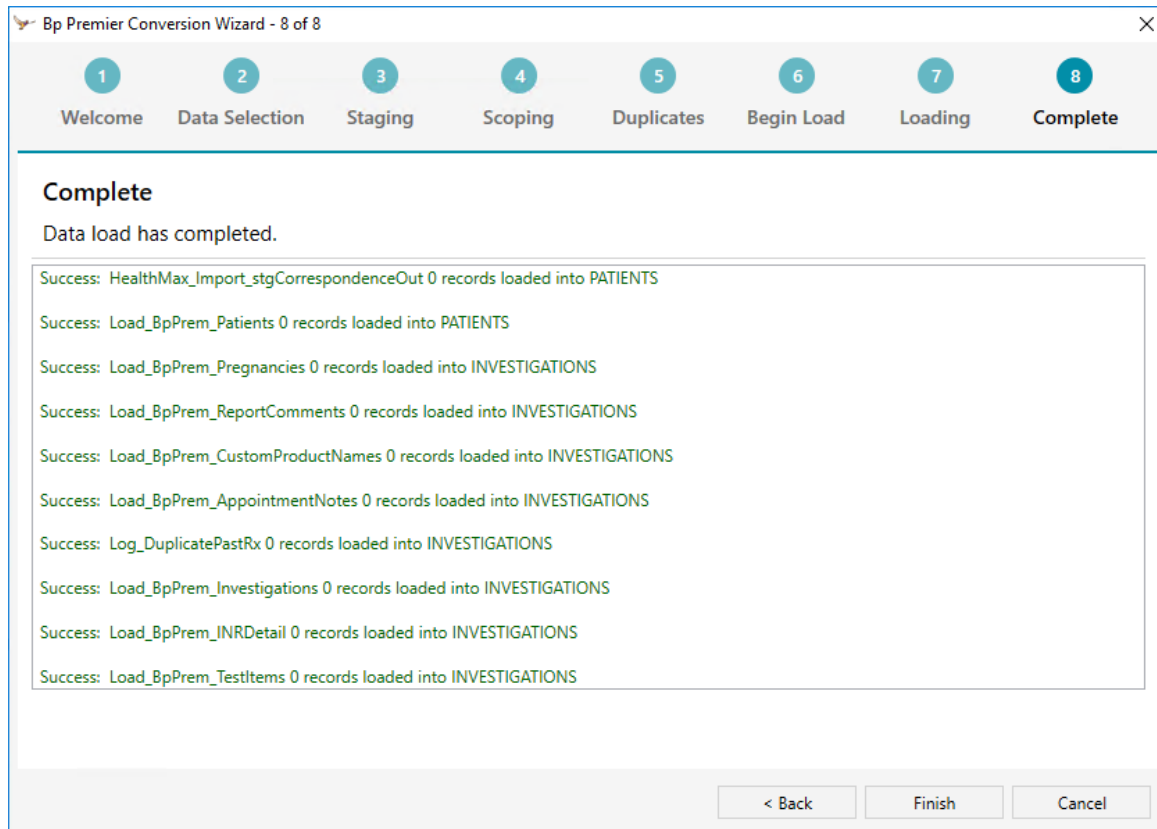
Run Update Database Utility

Ensure your Bp Premier database has the latest composition by running the **Update Database** utility.

1. Open Update Database. You can do this by either:
    a. Click the Start button and finding **Update Database**.
    b. Opening Windows Explorer and navigate to your Bp Premier installation folder, this is typically C:\Program Files\Best Practice Software\BPS. Locate the **Update Database** icon.
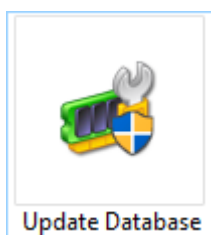

2. Double click **Update Database**.
3. If User Account Control asks if you want to proceed, click **Yes**.

4. The **Update Bp databases** screen appears.

5. Click **Run**. The process takes several minutes to complete.

Rebuild SQL Indexes

Rebuild the SQL indexes after the conversion has completed. Indexes are used by the database to speed up the retrieval of data by Bp Premier.

1. Open BP Utilities. You can do this by either:

    a. Click the **Start** button and finding **BP Utilities**.

    b. Opening Windows Explorer and navigate to your Bp PremierBp Premier installation folder, this is typically C:\Program Files\Best Practice Software\BPS. Locate the **BPS Utilities** icon.
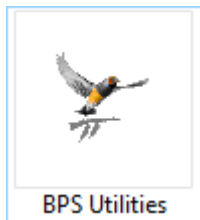
2. Double click the **Rebuild SQL Indexes** icon. The **Rebuild Indexes** window opens.

3. Click **Run**.

4. When the indexing process is complete, click the **Close** button.

Check conversion results

When the conversion is complete, check the results to ensure the data is correct. When logging in to Bp Premier after the conversion, the password for all users is **password**. You must change the password from the default before using Bp Premier in a live environment.

A principal doctor should:

1. Open a range of new to long term patients from Genie and compare that the same data is available in Bp Premier. Use the following table as a guide.

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	

2. Check that the last patient seen before the conversion has been transferred over correctly.

Submit conversion logs to Bp Premier support

When you are confident that the data from the **trial conversion** has converted correctly:

1. Email all conversion logs to support@bpsoftware.net. These logs files are in the **C:\Users\<*YourUserName*>\Documents\bp-conversions** folder. Include your contact details and practice name in the email.
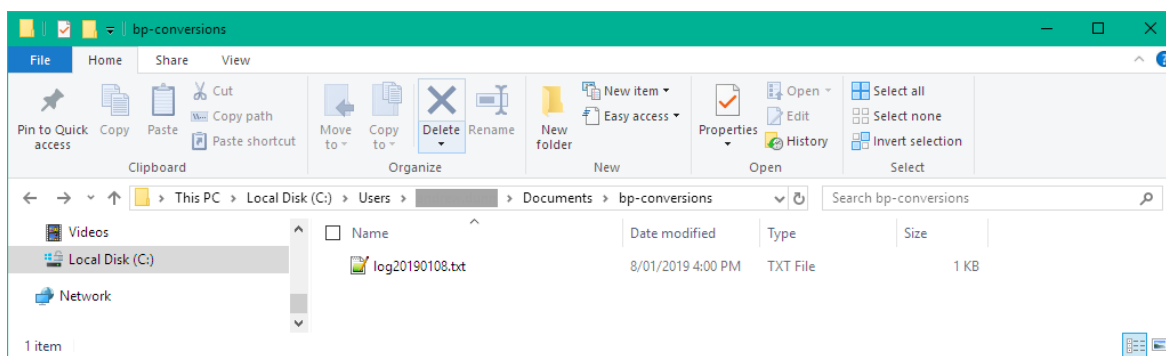
2. Bp Premier support will review the conversion logs.

3. If Bp Premier support do not identify any issues in the log files, the Bp Premier sales team will send the appropriate forms to allow you to receive a Site ID and 30-day Key.

4. Schedule a date to perform the **live conversion** and start using Bp Premier at your practice. Inform Bp Premier support of this date to ensure staff are available to assist you.

Perform a live conversion

Once the **trial conversion** has completed successfully, conversion logs submitted and a Site ID and 30-day Key received, then a **live conversion** can be completed.

1. Install the latest data updates on your conversion machine.
2. Follow the steps in the Conversion process on page 7 to perform the **live conversion**.
3. Follow the instructions in the Check conversion results on page 16 to ensure the **live conversion** has been successful.

You can now setup Bp Premier in your live environment.

Setting up Bp Premier in your live environment

After the **live conversion** has completed successfully on the conversion machine, you can start to use Bp Premier in your live environment.

1. Install the latest version of Bp Premier on your server. Install the Bp Premier server
2. Backup your converted data from your conversion machine and restore to your server.
3. Install the latest version of Bp Premier on all your workstations.
4. When logging in to Bp Premier after the conversion, the password for all users is **password**. You must change the password from the default before using Bp Premier in a live environment.
5. If you use a third party billing package, you must configure the link options with Bp Premier.
   a. Log in to Genie and remove any links to your third-party billing package.
   b. Turn off all results importing and background processes that were set up in Genie.
6. If you use Bp Premier management module,

Appendix

Converted data

This conversion process includes clinical data only. For information on how to transition to Bp Premier billing, see Convert to Bp Premier from other billing software.