



J A D E

Bp Premier MD3 Conversion Guide

Legal notices

This document is classified as commercial-in-confidence. Unauthorised distribution of this information may constitute a breach of our Code of Conduct, and may infringe our intellectual property rights. This information is collected and managed in accordance with our Privacy Policy, available on our [website](#).

© Copyright 2020

Best Practice Software believe the information in this User Manual is accurate as of its publication date. The information is subject to change without notice.

You may only copy, change, or use the User Manual as required for your own use as permitted under the End User Licence Agreement or the Order Form. User Manuals are intended for reference only and do not preclude the need for training.

Best Practice Software Pty Ltd
PO Box 1911
Bundaberg Queensland Australia 4670
www.bpsoftware.net

Best Practice Software New Zealand Ltd
PO Box 1459
Hamilton New Zealand 3240

The information contained in the User Manual is intended to be a guide only. BPS does not provide any warranty in relation to its currency, accuracy or completeness and, unless otherwise required by law, will not accept any liability in relation to any loss or damage suffered by you or any third party in reliance on the information contained in the User Manual.

Last updated: 31 October 2019

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.

NOTE This is a draft guide intended for Beta and Industry Preview users of Bp Premier who are trialling electronic prescribing. The steps and screenshots described in this guide may not match the functionality included in the public release of Jade SP3.

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 Medical Director 3 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:

- 64-bit operating system. The Zedmed conversion only supports the 64-bit version of Firebird SQL Server.
- Meet the Bp Premier system requirements. Search for **System Requirements** on the Bp Premier Knowledge Base.
- Meet the hardware requirements for Medical Director 3.
- Have sufficient free hard drive space. Check the size of your Medical Director 3 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. Search for **Install the Bp Premier server** on the Bp Premier Knowledge Base.

When installing Bp Premier, ensure to install a 64-bit version of SQL Server.

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.

5. Install Medical Director 3

Follow the directions provided in the Medical Director 3 help files to install a server installation on your conversion machine. Use default options during the installation process. The version must be the same as what you use in your live environment.

6. Check data condition

Ensure that your Medical Director 3 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. Backup Medical Director 3 data

Backup your Medical Director 3 data using the method recommended in Medical Director 3 help files. Ensure any documents stored outside the backup are included.

8. Restore Medical Director 3 data

Follow the instructions provided in the Medical Director 3 help files to restore your data to the conversion machine.

8. Copy Zedmed databases to your conversion machine

On your conversion machine, do not install Zedmed, instead locate and copy the following files from your Zedmed database server to your conversion machine:

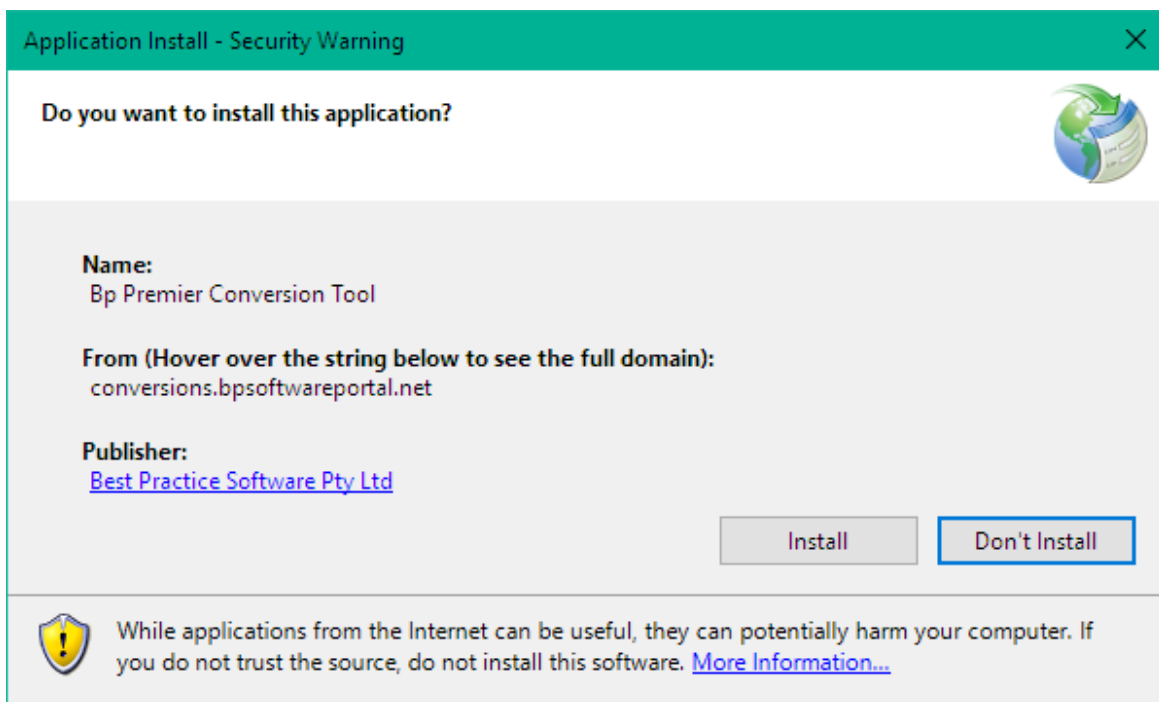
- **clinplus.fdb**
- **Superplus.fdb**

The Zedmed documents directory, typically named **Blobs** must also be copied to your conversion machine.

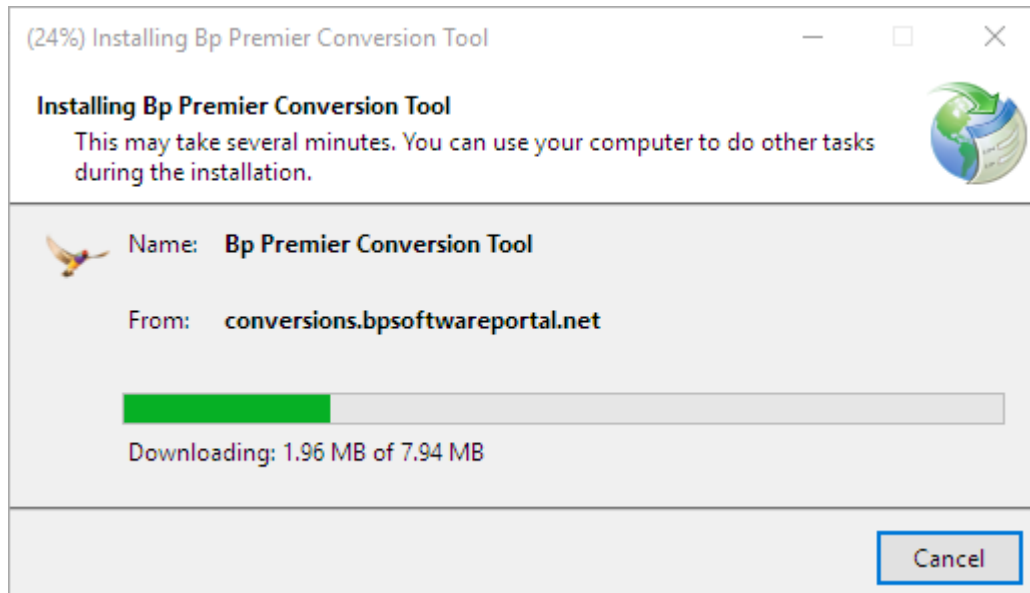
Install the Bp Premier Conversion Tool

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

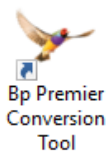
1. Download the conversion utility installation [here](#). Best Practice recommends using [Google Chrome](#) when installing this utility.
2. Double-click the downloaded file. The **Application Install** screen appears.



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.

Bp Premier Conversion Wizard - 1 of 8

1 Welcome 2 Data Selection 3 Staging 4 Scoping 5 Duplicates 6 Begin Load 7 Loading 8 Complete

Welcome

Welcome to the BP Premier Conversion Wizard.

Please ensure all other programs on this machine are closed, and that your source system and Bp Premier have been installed in a server configuration on this machine before proceeding.

Source: Medical Director 3

Source Server Name: (local)\HCNSQL07

Documents Directory: C:\HCN Live Data_FULL_20170120_0538\ManageEzy\HCN\Document

Load Data Into: Bp Premier Backup

Target Server Name: (local)\BPSINSTANCE

Conversion Type: Append

Next > Cancel

Bp Premier Conversion Wizard - 1 of 8

1 Welcome 2 Data Selection 3 Staging 4 Scoping 5 Duplicates 6 Begin Load 7 Loading 8 Complete

Welcome

Welcome to the BP Premier Conversion Wizard.

Please ensure all other programs on this machine are closed, and that your source system and Bp Premier have been installed in a server configuration on this machine before proceeding.

Source	Zedmed
Clinplus File Path	C:\Users\BpAdmin\Documents\ZedMed\Databases\clinplus.fdb
Superplus File Path	C:\Users\BpAdmin\Documents\ZedMed\Databases\Superplus.fdb
Documents Directory	C:\Users\BpAdmin\Documents\ZedMed\Blobs
Load Data Into	Bp Premier
Target Server Name	(local)\BPSINSTANCE
Conversion Type	Append

Next > Cancel

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

Field	Description
Source	Medical Director 3
Source Server Name	(local)\HCNSQL07
Documents Directory	Browse to your Medical Director 3 Document directory. This directory is typically located within a ManageEzy folder. Select the Document folder.
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 .

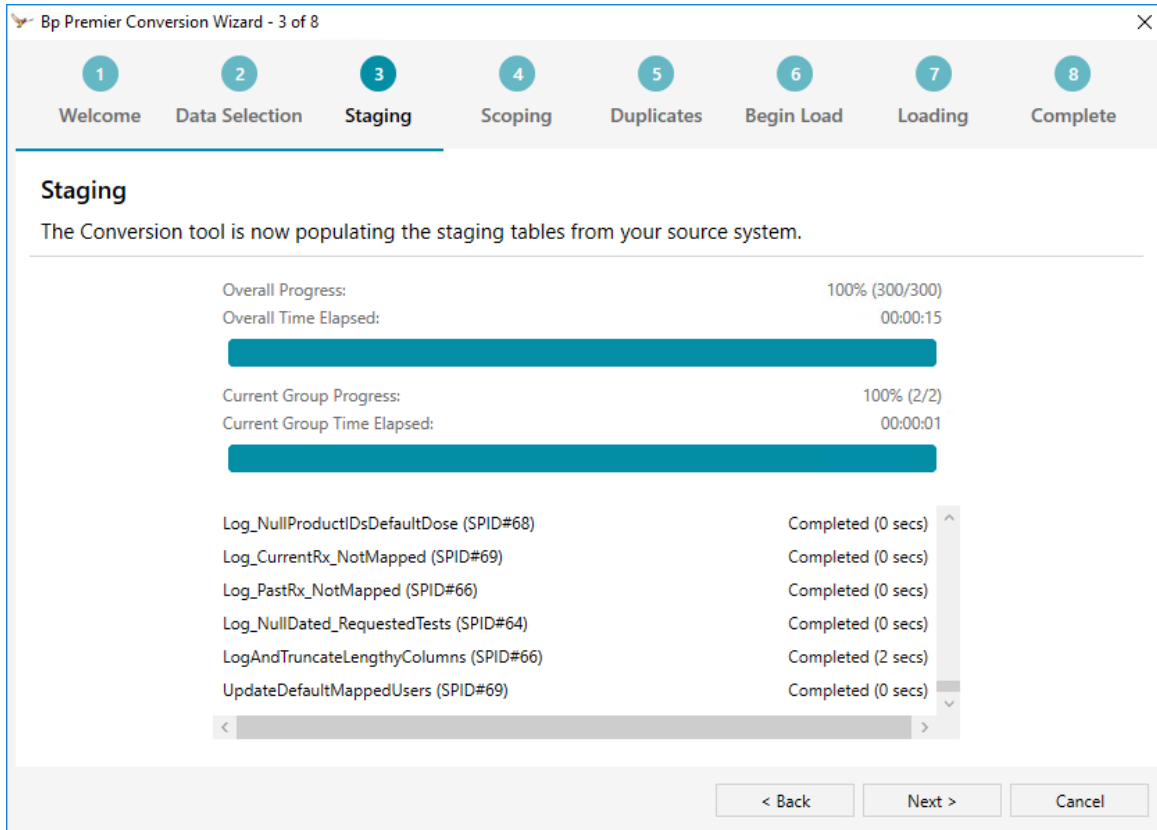
Field	Description
Source	Zedmed
Clinplus File Path	The path to the clinplus.fdb file copied from your Zedmed database server to your conversion machine.
Load Data Into	The path to the Superplus.fdb file copied from your Zedmed database server to your conversion machine.
Documents Directory	The path to the Zedmed documents directory that was copied to your conversion machine. This directory is typically called Blobs .
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. On the **Data Selection** screen, click **Next**. The **Data Selection** screen displays information regarding how much free space is available on your conversion machine. Ensure there is adequate free space on your conversion machine by adding up the size of the **clinplus.fdb**, **Superplus.fdb** and the **Blob** folder. Multiply the size of these items by three to find out how much free space you require. Click **Next** when you have confirmed you have adequate free space.

The screenshot shows the 'Bp Premier Conversion Wizard - 2 of 8' window. At the top, there is a progress bar with eight steps: 1 Welcome, 2 Data Selection (highlighted), 3 Staging, 4 Scoping, 5 Duplicates, 6 Begin Load, 7 Loading, and 8 Complete. Below the progress bar, the 'Data Selection' section is titled 'Data Selection' and contains the text 'Please use the following criteria to restrict data to import.' and 'Only matching data will be brought across during the migration.' There is a checkbox labeled 'Only convert attachments under the size of (Mb)' which is checked, and a text input field next to it containing the number '20'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

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
<input checked="" type="checkbox"/>	21	Mrs Penny ANDERSON	4/07/1993
<input checked="" type="checkbox"/>	23	Mrs Maureen ANDREWS	23/06/1923
<input type="checkbox"/>	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 Medical Director 3 data to a user in your Bp Premier data. Mapping users improves the quality of your data. To map a user:

- Select the **Users** tab.
- Identify the user to map and click the corresponding **Map User...** button, the **Please select a user to map to** appears.
- 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 Medical Director 3 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 Medical Director 3 and Bp Premier ensure that the appropriate check box is selected. If the item is not checked, then a duplicate is added.

<input checked="" type="checkbox"/> Select All	External ID	Patient Details	DOB	Target ID	Target Patient Details	Target DOB
<input checked="" type="checkbox"/>	1	Christopher Ashley	7/10/1954	1	Christopher Ashley	7/10/1954

Use newest data	The newest data from either Bp Premier or Medical Director 3 is used.
Use target system data	The data from Bp Premier is used.
Use source system data	The data from Medical Director 3 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.

Bp Premier Conversion Wizard - 5 of 8

1 Welcome 2 Data Selection 3 Staging 4 Scoping 5 **Duplicates** 6 Begin Load 7 Loading 8 Complete

Duplicates

Potential duplicate patients were identified between the source and target databases.

Please review each potential duplicate below and confirm the patient it has been mapped to. When loading the mapped patients, any documents or past history with the same data will not be loaded.

Conflicting data (name, address details, etc) Use newest data

Patients Contacts

54 selected Search

<input checked="" type="checkbox"/> Select All	External ID	Patient Details	DOB	Target ID	Target Patient Details	Target DOB
<input checked="" type="checkbox"/>	1	Christopher Ashley	7/10/1954	1	Christopher Ashley	7/10/1954
<input checked="" type="checkbox"/>	122	Neville Bamshoe	21/05/1973	122	Neville Bamshoe	21/05/1973
<input checked="" type="checkbox"/>	110	Alison Banks	24/05/1998	110	Alison Banks	24/05/1998
<input checked="" type="checkbox"/>	98	Jennie Barefoot	24/04/1997	98	Jennie Barefoot	24/04/1997
<input checked="" type="checkbox"/>	101	Barnett Becky	27/02/1997	101	Barnett Becky	27/02/1997

Click **Next**.

9. The **Begin Load** screen displays a summary of the conversion actions.

Check the **Assign Location to converted prescriptions with LocationId = 0** checkbox to assign prescriptions with no location to a location. Select the location to map to in the **Location** selection list.

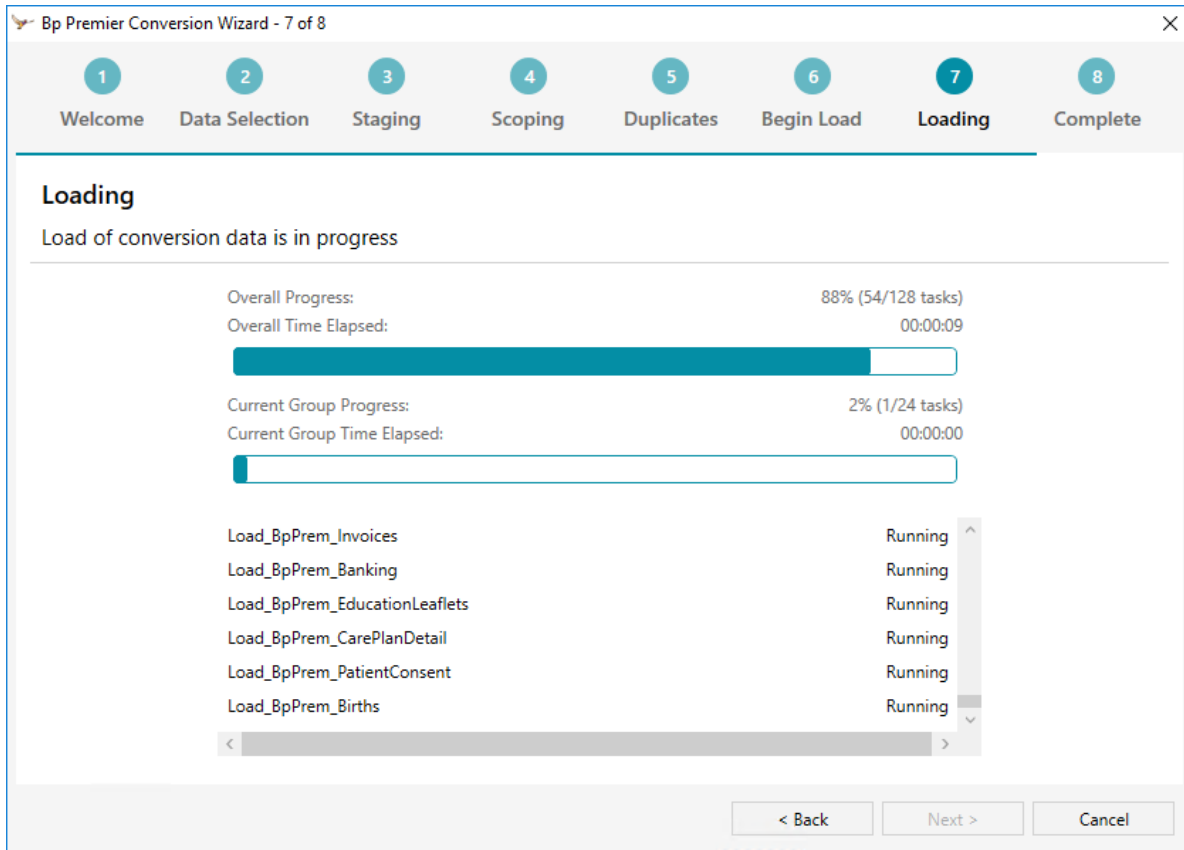
Review the summary and click **Next** when ready.

The screenshot shows the 'Begin Load' step of the Bp Premier Conversion Wizard. The wizard has 8 steps: 1 Welcome, 2 Data Selection, 3 Staging, 4 Scoping, 5 Duplicates, 6 Begin Load (current), 7 Loading, and 8 Complete. The 'Begin Load' section displays a summary of conversion actions:

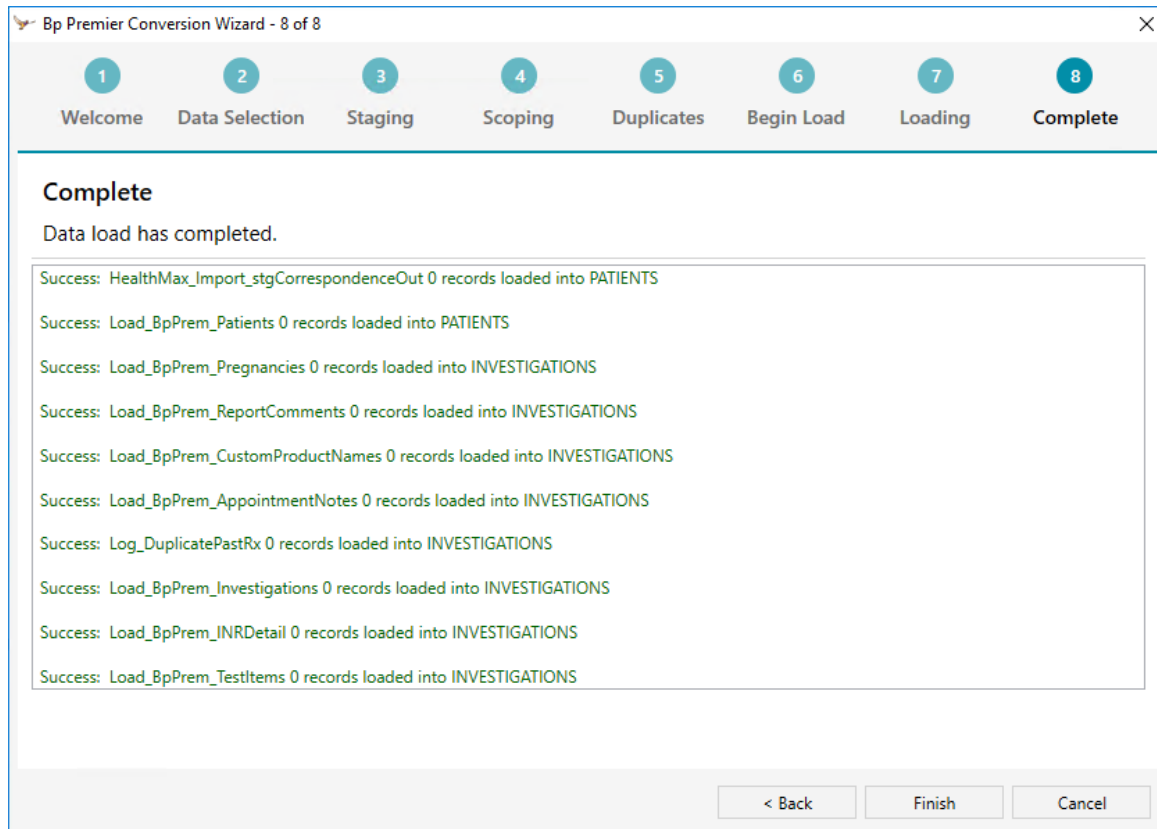
- 133829 Patients to be loaded
- 0 Patients to be merged
- 205 Users to be loaded
- 0 Users to be merged
- 6858 Contacts to be loaded
- 0 Contacts to be merged

Below the summary, there is a checkbox labeled 'Assign Location to converted prescriptions with LocationId = 0' which is checked. To the right of the checkbox is a 'Location:' dropdown menu with a list of location options. At the bottom of the wizard, there are three buttons: '< Back', 'Next >', and 'Cancel'.

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.



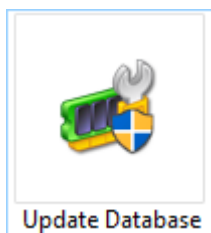
11. The **Complete** screen displays a summary of the conversion process. Click **Finish**.



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.



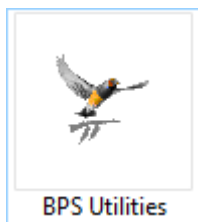
2. Double click **Update Database**.
3. If User Account Control asks if you want to proceed, click **Yes**.

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 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 **samples**. 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 Medical Director 3 and compare that the same data is available in Bp Premier. Use the following table as a guide.

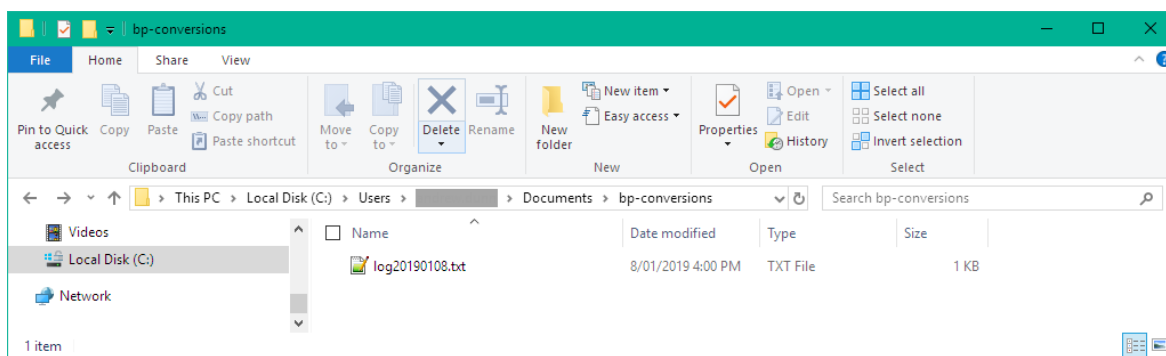
Patient demographics correct	Correspondence In and Out present and accessible
Past Visit records present and accessible	Reminders present, correct and accessible
Current and Past RX are present and correct	Autotext present and accessible
Investigation results present and accessible	Custom Templates present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

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\ 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 18 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. Back up 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. Set up Bp Premier Clinical and Management functions, such as billing preferences and online claiming :
 - a. Set up the Clinical module
 - b. Set up the Management module

Search for set up clinical and management in the Knowledge Base for your version of Bp Premier. Select Help > Online to open the Knowledge Base.

5. If you use a third party billing package, you must configure the link options with Bp Premier.
 - a. Log in to Medical Director 3 and remove any links to your third-party billing package.
 - b. Turn off all results importing and background processes that were set up in Medical Director 3.

Appendix

Converted data

This conversion process includes clinical data only.

The following table lists data included in the conversion process.

Doctors	Auto text	Health Assessments
Patients	Pathology Requests	Diabetes assessments
Heads of family	Pregnancies	Patient Education
Social history	Antenatal visits	Asthma plans
Reactions	Antenatal results	Graphics
Allergies	Clinical details	Inbox
Templates	cervical screens	ECGs
Letters	Measurements	Patient photos
EPC Reports	INR values	Atomised Values
Recipes	Recall protocols	Pathology Results
Current Rx	Reminders	Appointments & Sessions
Default doses	Actions	Documents
Progress notes	Categories	
History	Address book	
Immunisations	Complex instructions	
Past prescriptions	Custom fields	