



Medtech32 Australia Version 9.2.2 Build 4566 Release

Installation Checklist



IMPORTANT NOTE

WARNING: This checklist contains **MANDATORY** pre-requisites which **MUST BE COMPLIED WITH** prior to installing Medtech32 Version 9.2.2 Build 4566. The consequences of not meeting these pre-requisite requirements could possibly lead to application malfunction and data corruption, and as a result – data loss and system downtime.








Please ensure this checklist is circulated amongst all your internal IT staff or external IT service provider, and ensure the IT technician(s) responsible for the installation submit the completed checklist to the practice manager.

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For further information on this release, or any other queries regarding Medtech32 Version 9.2.2 Build 4566 Release, please contact the Medtech Helpdesk on 1800 148 165 → Option 1, or email support@medtechglobal.com.

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Server Installation Checklist

Server Pre-requisite Checklist	Tick	Date / Time	Action By	Time Spent
 <p>Has the minimum version (VERSION 9.2.1 OR ABOVE) build requirements been met?</p> <p>This can be checked by logging onto Medtech32 and selecting <i>Help ► About Medtech32</i>.</p>				
 <p>Have you READ THROUGH the document "<u>Medtech32 Technical Release Notes – Version 9.2.2 Build 4566?</u>"</p> <p>See: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/</p> <p>This document contains valuable information that, if not read, could seriously affect the upgrade process and possible downtime of your network.</p>				
 <p>Have ALL Briefcasing Laptop data been Checked In before being disconnected from the network?</p>				
 <p>Have you logged in with Windows ADMINISTRATIVE RIGHTS?</p>				
 <p>Have you DISABLED "User Account Control" (UAC) policy across ALL Server and Client computers that are running on Windows Vista or Windows 7 or Windows 2008 or Windows 2008 R2?</p>				
 <p>To avoid unnecessary problems during installation, upgrade, or maintenance, preferably you must ALWAYS log onto Windows in "Console Mode" – i.e. not through Remote Desktop or Citrix, but via alternative means that allows remote connection to the Console such as VNC, TeamViewer, etc.</p>				
 <p>If the Medtech32/Interbase Server is also serving as Microsoft Remote Desktop Services (formerly Terminal Services) and/or Citrix XenApp (formerly Presentation Server), ensure it is switched to INSTALL MODE.</p>				

Server Pre-requisite Checklist (cont'd)	Tick	Date/ Time	Action By	Time Spent
 <p>Have you completed a backup of the MT32 directory, and <u>ALL</u> databases located in the MT32\Data directory?</p> <p><u>Prior To</u> backing up (including copy or paste or move or rename) <u>ANY</u> database file, it is important that <u>Interbase Guardian and Server</u> have been <u>STOPPED</u> in order to avoid corruptions.</p> <p>Once the File Copy backup has been completed, Interbase Guardian and Server can be restarted.</p>				
 <p>You have a completed a <u>SUCCESSFUL</u> Database Backup copy (i.e. Interbase Backup) on <u>ALL</u> databases?</p> <p>Note: Scheduling this upgrade to be actioned immediately after your usual Daily Backup and ensuring that you also have a File Copy backup of your Database(s) and a File Copy of your Medtech32 Folder is the minimum that must be completed, prior to running this Medtech32 upgrade.</p> <p>Backups - By default this must include both <u>MT32.IB</u> and <u>BLOB.IB</u>, PLUS ALL other databases you would like to upgrade (e.g. <u>Training.IB</u> and <u>TrainBLOB.IB</u> databases if you would like to keep them for training/testing, and ALL additional pair of databases for each additional site/department).</p> <p>Note: It is important to ensure that All Briefcasing data has been Checked In and included in the Backups.</p>				
 <p>ALL Users <u>LOGGED OUT</u> of Medtech32 on <u>ALL</u> Server(s) and Clients – including remote users and idle users in Remote Desktop or Citrix sessions?</p>				
 <p>ALL Services that require access to the databases have been <u>STOPPED</u>?</p> <p>– e.g. Medtech Services (for ManageMyHealth SMS and Portal), Medtech Data Transfer Service (for RxSQL Clinical Link), IIS Server (for Medtech Clinical Audit Tool), eRx Services, MediSecure Services, etc.</p>				

 <p>ALL Applications that require access to the databases have been STOPPED –</p> <p>e.g. MedtechGlobalHIService (for NEHTA HI Service, SMD, PCEHR), eClinic SMSC Desktop, Pen Clinical Audit Tool, other Custom/Third-party Applications and Reporting Utilities not supplied by Medtech, etc.</p>				
 <p>ALL Scheduled Tasks that require access to the databases have been STOPPED –</p> <p>e.g. Message Transfer Utility, Auto Scan from Folder, NPS RADAR Update/Submit, etc.</p>				
 <p>ALL Routine Backup and Maintenance Tasks that require access to the databases have been STOPPED</p> <p>e.g. Daily: Database File Backup, Interbase Database Sweep. Monthly: Interbase Backup and Restore, etc.</p>				
 <p>ALL Briefcase Laptops with OUTSTANDING Briefcased data have been CHECKED-IN prior to running the update on the Server.</p>				

Server Installation Checklist	Tick	Date /Time	Action By	Time Spent
1. Install Medtech32 VERSION 9.2.2 Build 4566 Update on the Server by following the step by step instructions in the document " <i>Medtech32 Technical Release Notes - Version 9.2.2 Build 4566</i> ". This document can be downloaded from the Medtech Support web site: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/				
Upgrade Installed and Completed				
2. If the Medtech32/Interbase Server is also serving as Microsoft Remote Desktop Services (formerly Terminal Services) and/or Citrix XenApp (formerly Presentation Server), ensure it is switched back to EXECUTE MODE .				
3. Restart ALL Services that have been STOPPED prior to the installation – e.g. Medtech Services (for ManageMyHealth SMS and Portal), Medtech Data Transfer Service (for RxSQL Clinical Link), IIS Server (for Medtech Clinical Audit Tool), eRx Services, MediSecure Services, etc.				

Server Installation Checklist	Tick	Date /Time	Action By	Time Spent
<p>4. Restart ALL Applications that have been <u>STOPPED</u> prior to the installation – e.g. Medtech MedtechGlobalHIService (for NEHTA HI Service, SMD, PCEHR), eClinic SMSC Desktop, Pen Clinical Audit Tool, other Custom/Third-party Applications and Reporting Utilities not supplied by Medtech, etc.</p>				
<p>5. Resume ALL Scheduled Tasks that have been <u>STOPPED</u> prior to the installation – e.g. Message Transfer Utility, Auto Scan from Folder, NPS RADAR Update/Submit, etc.</p>				
<p>6. Resume ALL Routine Backup and Maintenance Tasks that have been <u>STOPPED</u> prior to the installation – e.g. Daily Database File Backup, Daily Interbase Database Sweep, Monthly Interbase Backup and Restore, etc.</p>				
<p>7. Ensure you can <u>SUCCESSFULLY</u> logon to the Medtech32 application from the Medtech32 Server <u>WITHOUT ANY ERRORS.</u></p> <p>It is also recommended to briefly test the key features within Medtech32 to ensure you can view future Appointments (press F7), patient clinical records (press F6), patient accounts records (press Shift + F9), Medicare claiming records (press Ctrl + B), etc.</p>				

Client Pre- and Post-Installation Checklist

Client Pre-requisite Checklist	Tick	Date/Time	By	Time Spent
1. Ensure ALL Users have <u>LOGGED OUT</u> of Medtech32 on <u>ALL</u> Clients – including remote users and idle users in Remote Desktop or Citrix sessions.				

Client Installation Checklist	Completed Date/Time	Completed By	Time Spent
No changes required.	–	–	–

Client Post-requisite Checklist	Tick	Date /Time	Action By	Time Spent
1. Ensure you can <u>SUCCESSFULLY</u> logon to the Medtech32 application from <u>EACH TYPE</u> of Clients <u>WITHOUT ANY ERRORS</u> . Including standard client workstations (i.e. fat clients), and connections via Remote Desktop or Citrix sessions (i.e. thin clients).				

Medicare Online Checklist

Client Installation Checklist	Completed Date/Time	Completed By	Time Spent
No changes required if you have the latest PKI Certificate Version	–	–	–

MedtechGlobalHIServices Checklist

MedtechGlobalHIServices	Completed Date/Time	Completed By	Time Spent
No change required if already on Medtech32 V9.2.1 B4494	–	–	–

Briefcase Installation Checklist

Briefcase Pre-requisite Checklist	Tick	Date /Time	Action By	Time Spent
<p>1. Ensure the minimum version and build requirements are met.</p> <p>Your Briefcase Laptops MUST be on Medtech32 <u>VERSION 9.2.1 OR ABOVE</u> to install this Update. If you <u>ARE NOT</u> currently on this version or higher, please <u>DO NOT</u> continue.</p> <p>This can be checked by logging onto Medtech32 and selecting <i>Help ► About Medtech32</i>.</p>				
<p>2. Ensure the person(s) who will be performing the installation have <u>READ THROUGH</u> the document "<i>Medtech32 Technical Release Notes - Version 9.2.2 Build 4566</i>", which can be downloaded from the Medtech Support web site: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/</p> <p>This document contains valuable information that, if not read, could seriously affect the upgrade process and possible downtime of your network.</p>				
<p>3. Ensure you are <u>ALWAYS</u> logged onto Windows with <u>ADMINISTRATIVE RIGHTS</u> when performing <u>ANY</u> installation, update or maintenance tasks.</p>				
<p>4. "<u>User Account Control</u>" (UAC) MUST be <u>DISABLED</u> as a policy across <u>ALL</u> Briefcase Laptops that are running on <u>Windows Vista or Windows 7 or Windows 2008 or Windows 2008 R2</u>.</p>				
<p>5. To avoid unnecessary problems during installation, upgrade, or maintenance, preferably you should <u>ALWAYS</u> log onto Windows in "<u>Console Mode</u>" – i.e. not through Remote Desktop or Citrix, but via alternative means that allows remote connection to the Console such as VNC, TeamViewer, etc.</p>				
<p>6. Ensure you have <u>LOGGED OUT</u> of Medtech32 on <u>ALL</u> Briefcase Laptops.</p>				

Briefcase Pre-requisite Checklist	Tick	Date /Time	Action By	Time Spent
<p>7. Ensure <u>ALL</u> Briefcase Laptops with OUTSTANDING Briefcased data has been CHECKED-IN to the main Medtech32 Server before running the update on the Briefcase Laptops.</p> <p>All Briefcase Laptops MUST ALWAYS be on the SAME Medtech32 Version and Build and SAME Interbase Version as the Main Medtech32 Server. Otherwise data corruptions, and thus data loss, might occur during check-ins.</p>				
<p>8. Disconnect the Briefcase Laptops from the Network.</p>				
<p>9. Backup the existing <u>MT32.ini</u> configuration file on <u>EACH</u> Briefcase Laptop, which can be found under the "<u>MT32\Bin</u>" directory.</p> <p>(If applicable): Modify the <u>MT32.ini</u> configuration file by adding a leading Semicolon (;) to comment out the [IBx] section that points to <u>ANY Databases</u> on the Main Medtech32 Server, e.g. from [IB0] to ;[IB0].</p> <p>Order the remaining [IBx] sections that point to <u>ANY LOCAL Databases</u> on the Briefcase Laptop in SEQUENTIAL ORDER, stating from [IB0], [IB1], [IB2] ... [IBn].</p>				

Briefcase Installation Checklist	Tick	Date /Time	Action By	Time Spent
<p>1. Install Medtech32 VERSION 9.2.2 Build 4566 Update on <u>EACH</u> Briefcase Laptop by following step by step in the document "<u>Medtech32 Technical Release Notes - Version 9.2.2 Build 4566</u>", which can be downloaded from the Medtech Support web site: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/</p>				

Briefcase Post-requisite Checklist	Tick	Date /Time	Action By	Time Spent
1. Reconnect the Briefcase Laptops to the Network.				
2. Revert back to the ORIGINAL COPY of <u>MT32.ini</u> configuration file on <u>EACH</u> Briefcase Laptop.				
<p>3. Once you have <u>SUCCESSFULLY</u> updated the Briefcase Laptops to the <u>SAME Medtech32 Version and Build</u> as the Main Medtech32 Server, you <u>MUST</u> then perform a COMPLETE CHECK-OUT on <u>EACH</u> Briefcase Laptop.</p> <p>All Briefcase Laptops <u>MUST ALWAYS</u> be on the SAME Medtech32 Version and Build and SAME Interbase Version as the Main Medtech32 Server. Otherwise data corruptions, and thus data loss, might occur during check-outs.</p>				
<p>4. Ensure you can <u>SUCCESSFULLY</u> logon to the Medtech32 application from <u>EACH</u> Briefcase Laptop WITHOUT ANY ERRORS. This includes logging onto both the <u>LOCAL Briefcased Database</u> on the Briefcase Laptop, and <u>ALL Databases</u> on the Main Medtech32 Server.</p> <p>It is also recommended to briefly test the key features within Medtech32 in the <u>LOCAL Briefcased Database</u> on <u>EACH</u> Briefcase Laptop to ensure you can view future appointments (press F7), patient clinical records (press F6), patient accounts records (press Shift + F9), Medicare claiming records (press Ctrl + B), etc.</p>				
<p>5. Once logged onto the <u>LOCAL Briefcased Database</u> on <u>EACH</u> Briefcase Laptop, verify that it is running in 'Briefcase Mode' by checking the description of the <u>Main Application Title</u> at the very top of the Medtech32 application, which should display: "Customer Name [Briefcasing]".</p> <p>If the <u>Main Application Title</u> does not display [Briefcasing] after the Customer Name, it could mean that the Briefcase Check-out has failed. Please contact the Medtech Helpdesk for assistance.</p>				