

## Upgrade Guide

### Medtech Evolution General Practice

Version 1.14 – Build 1.14.0.25

(January 2019)



*These instructions contain important information for all Medtech Evolution users and IT Support personnel. We suggest that these notes are filed safely for future reference.*

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## Prerequisites Checklist

1	Ensure that Medtech Evolution General Practice Version Build <b>Version 1.7.0.35</b> (minimum) is installed	<input type="checkbox"/>
2	Ensure that Medtech Services <b>Version 1.7.0.35</b> (minimum) is installed	<input type="checkbox"/>
3	Ensure all users (including remote users): <ul style="list-style-type: none"> <li>○ Have logged out of Medtech Evolution General Practice Version</li> <li>○ All scheduled utilities, backup or maintenance tasks, and third party interfaces that require access to the databases have been stopped.</li> </ul>	<input type="checkbox"/>
4	Ensure all Brief casing laptops have been disconnected from the network.	<input type="checkbox"/>
5	<p>Ensure following utilities/services are stopped (services.msc):</p> <ul style="list-style-type: none"> <li>○ Medtech Message Transfer Service</li> <li>○ Medtech NIR Transfer Service</li> <li>○ Medtech Shell Service</li> <li>○ Medtech Fax Service</li> <li>○ Medtech Scheduling Service</li> <li>○ Medtech Diagnostic Service</li> </ul> <p>Ensure following services are stopped IF the practice has <u>Healthone</u> integration:</p> <ul style="list-style-type: none"> <li>○ Medtech: H1PluginService</li> <li>○ Medtech: Evo Api Service (if available – please see Note below)</li> </ul> <p><b>Please Note:</b> The Medtech: Evo Api Service will only be available in specific practices. If your practice <u>does not</u> have this service you can continue with upgrade.</p>	<input type="checkbox"/>
6	Ensure a complete backup of the SQL server database is done before performing the upgrade	<input type="checkbox"/>

### IMPORTANT NOTE

Upon upgrade to the Evolution 1.14.0.25 release, the existing Widget configuration for all users will be removed from the Role/Staff Setup. This means that existing Widget configurations in use by staff will no longer be available.

Post upgrade Widget configurations can be completed by each user themselves under their User Preferences configuration.

This will allow users to configure and setup their own Widgets without the requirement for Setup Access Privileges being assigned to their roles.

It is recommended that you note down the current Widget configurations for a user before upgrade, so that they can be re-configured post upgrade in the User Preferences.

## Locating the Installer

Medtech Evolution General Practice Version 1.14 is available for download as follows:

Installed to	32-Bit	64-Bit	Purpose
Database Server	<b>EvolutionDB_Upgrade 1.14.0.25</b>		Upgrade the database and application
Application Services Server	<b>Medtech Services Update 1.14.0.25</b>		Upgrade the Medtech Services

**NOTE:** Packages are compatible to both 32-Bit and 64-Bit environments (automatically detected)

### Important Note

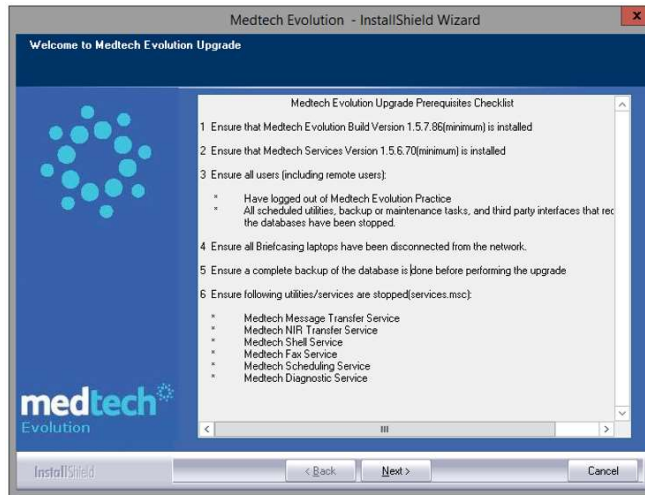
There is no separate installer provided for application as the database server installation contains both the database and application upgrade

# Upgrade Guide

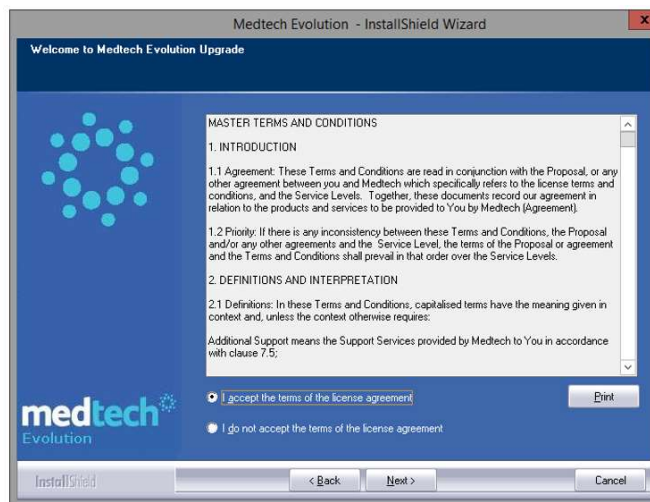
## Preparing to upgrade the Database Server

### Database Upgrade

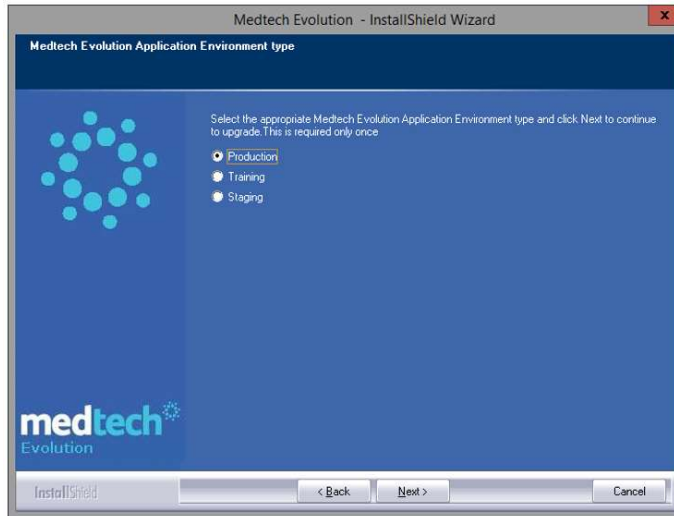
1. Log on to the Database Server.
2. Locate and double click on the **EvolutionDB\_Upgrade 1.14.0.25.exe** to launch the installation wizard.
3. Please read and ensure the following Upgrade prerequisites checklist before starting the installation



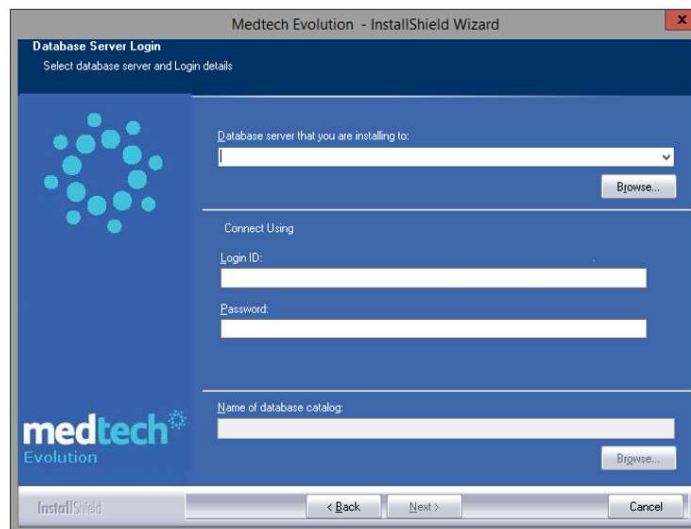
4. Click the 'Next' button to continue
5. The License Agreement screen will appear



6. Read through the terms and click I accept in order to proceed with the upgrade



7. Select the appropriate Medtech Evolution Application Environment type and click next to continue to upgrade. This is required only once.
8. Click the 'Browse' button to select the Database Server from the list or manually type the Database Server Name.
9. Type in the SQL login credentials for the corresponding SQL server.
10. Click the 'Browse' button and select the database name.
11. Click the 'Next' button

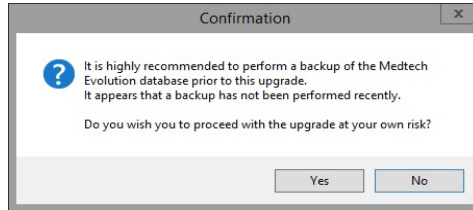


**Important Note**

Once the information is provided, database server login inputs are retained in the cache. Subsequent upgrades do not require these inputs

**Important Note**

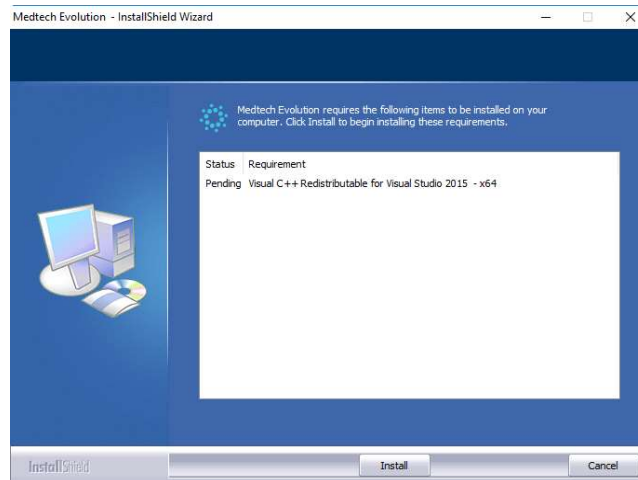
A warning message will be displayed when the time limit to take backup of database exceeds a particular time limit.



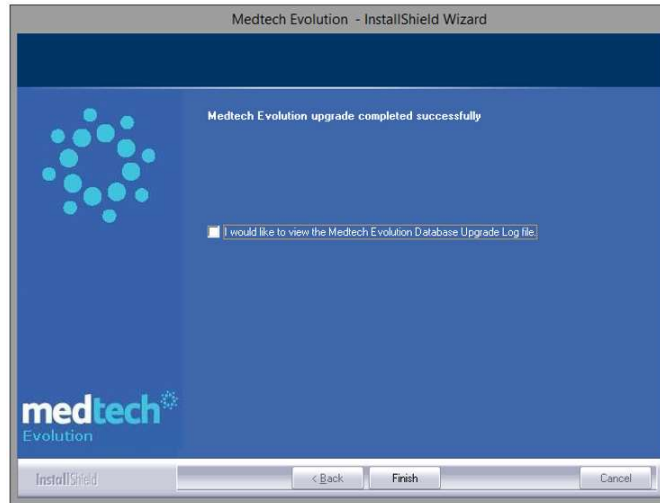
**Important Note**

The installation will be terminated if there are any users or Services actively connected to the Database.

12. If the below message is displayed, please click on Install to complete the installation of the redistributable file for Crystal Reports



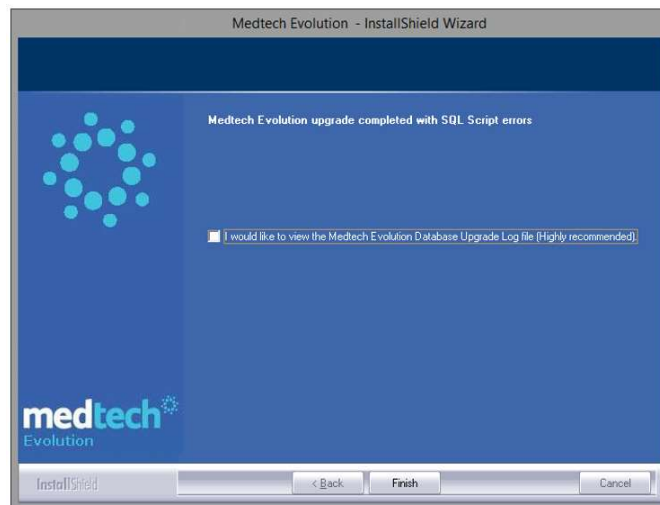
13. Please select the checkbox below to verify the log files and click Finish.



**Important Note**

If the upgrade encounters any database script error while performing upgrade, the below screen will appear. Please contact **Medtech Support** immediately. Email us at [support@medtechglobal.com](mailto:support@medtechglobal.com)

14. Click Finish to exit the wizard





## Application Upgrade

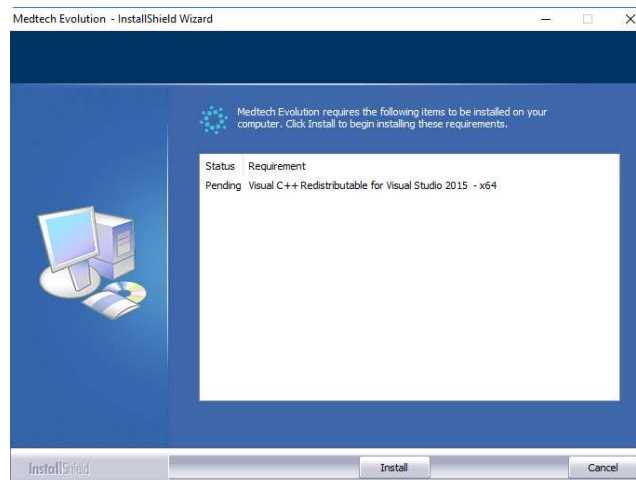
### Important Note

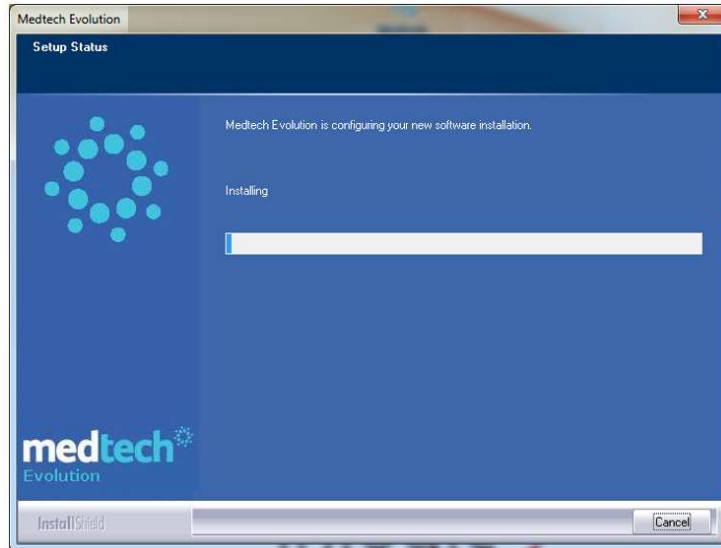
The Application upgrade can be done only when the DB upgrade has been completed successfully

1. Log on to the Client Desktop/Citrix/Terminal server.
2. Login to Medtech evolution application to initiate the application upgrade process  
Upon successful logon, the below information will be displayed

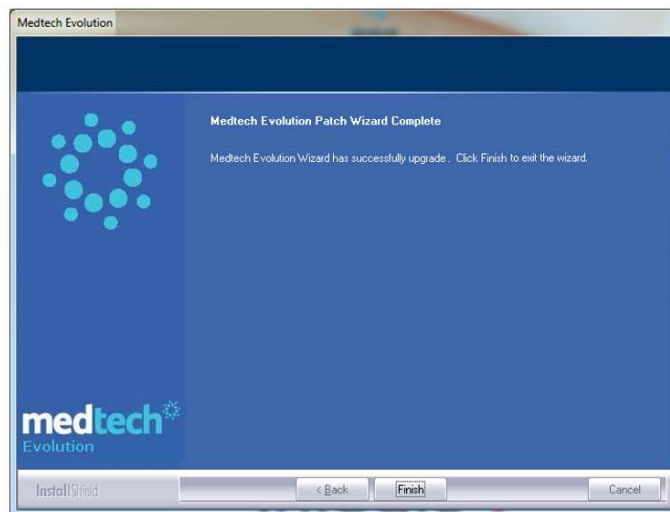


3. Click the 'OK' button to upgrade the Medtech Evolution application.
4. If the below message is displayed, please click on Install to complete the installation of the redistributable file for Crystal Reports

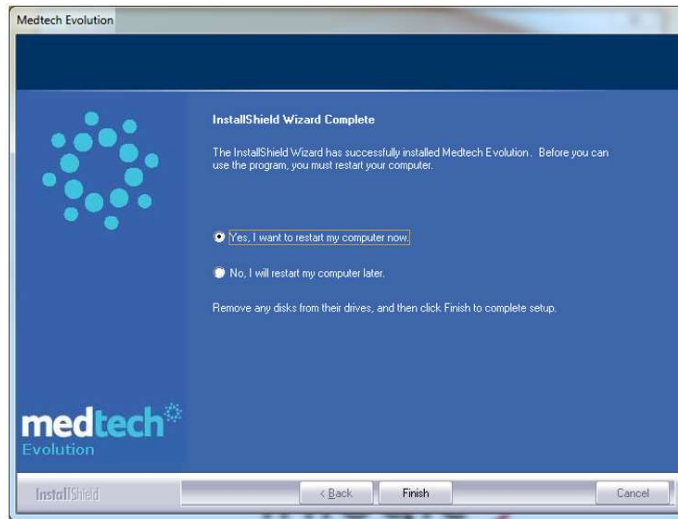




- 5. Click 'Finish' to complete the installation.



6. In certain scenarios, instead of the above window, you may see the following screen

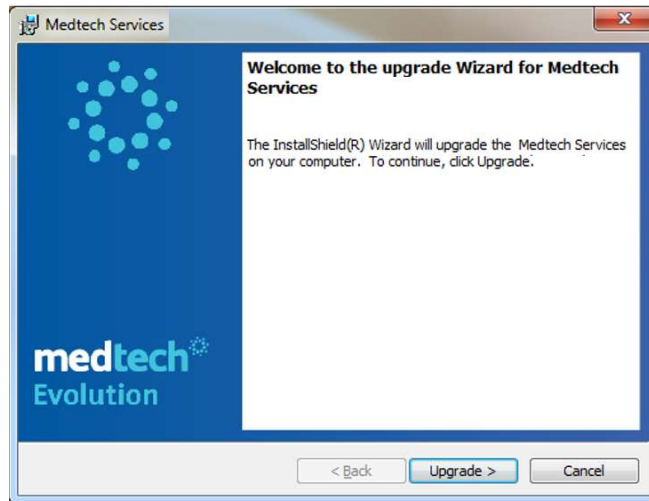


7. In such a scenario, please ensure you to choose to restart the computer

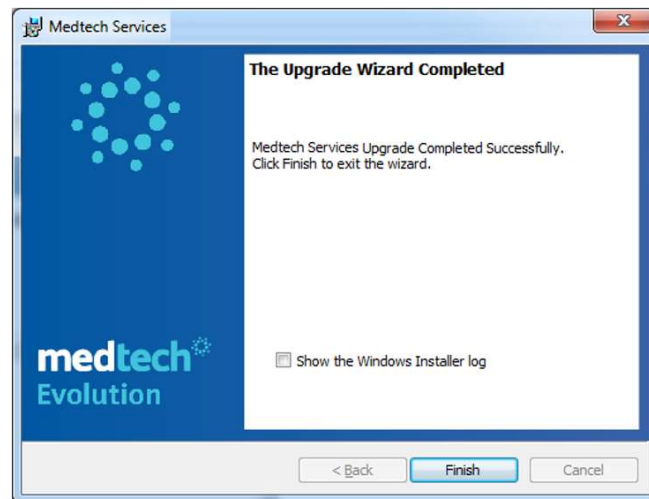
## Application Services Upgrade

### Medtech Services

1. Log on to the application services server.
2. Locate and double click on the **Medtech Services\_Update 1.14.0.25.exe** to launch the installation wizard
3. The '**Welcome to Install Shield Wizard for Medtech Services**' window is displayed.



4. Click the 'Upgrade' button to proceed further.



5. Click the '**Finish**' button to complete the installation.

## Post-Installation Checklist

1	Any errors encountered during the post-installation process have been recorded and provided to Medtech Support for assistance.	<input type="checkbox"/>
2	If prompted to do so after application server installation, confirm that a reboot of the server has been completed.	<input type="checkbox"/>
3	Check that the upgrade has been run on all laptops and clients that are used for Briefcasing and has completed without errors.	<input type="checkbox"/>
4	Login to Medtech Evolution and ensure the database connection is successful.	<input type="checkbox"/>
5	Check the current Medtech Evolution installed version [ <b>Help ▶ About Medtech Evolution</b> ]. After the upgrade has been run, this should read <b>1.14.0.25</b>	<input type="checkbox"/>
6	<p>Ensure following utilities/services are started (services.msc):</p> <ul style="list-style-type: none"> <li>○ Medtech Message Transfer Service</li> <li>○ Medtech NIR Transfer Service</li> <li>○ Medtech Shell Service</li> <li>○ Medtech Fax Service</li> <li>○ Medtech Scheduling Service</li> <li>○ Medtech Diagnostic Service</li> </ul> <p>Ensure following services are started IF the practice has <u>Healthone</u> integration:</p> <ul style="list-style-type: none"> <li>○ Medtech: H1PluginService</li> <li>○ Medtech: Evo Api Service (if available – please see Note below)</li> </ul> <p><b>Please Note:</b> The Medtech: Evo Api Service will only be available in specific practices.</p>	<input type="checkbox"/>
7	Ensure that all staff can successfully log into Medtech Evolution without any issues.	<input type="checkbox"/>

For further information, please contact Medtech Support via one of the follow options:

- **Insight:** Register for the Insight Customer Portal at <https://insight.medtechglobal.com/> and Log a Support Ticket
- **Online Chat:** [www.medtechglobal.com](http://www.medtechglobal.com)