



Upgrading LytecMD from 9.3.1 to 9.4 on Windows Server 2008

Best Practices

Revision Date: 7/29/2010

PLEASE READ:

This installation guide will guide you through the upgrade of LytecMD 9.3.1 to 9.4. If you need assistance upgrading Lytec 2010 Practice Management, please refer to the installation guide on the disc or contact technical support for further assistance.

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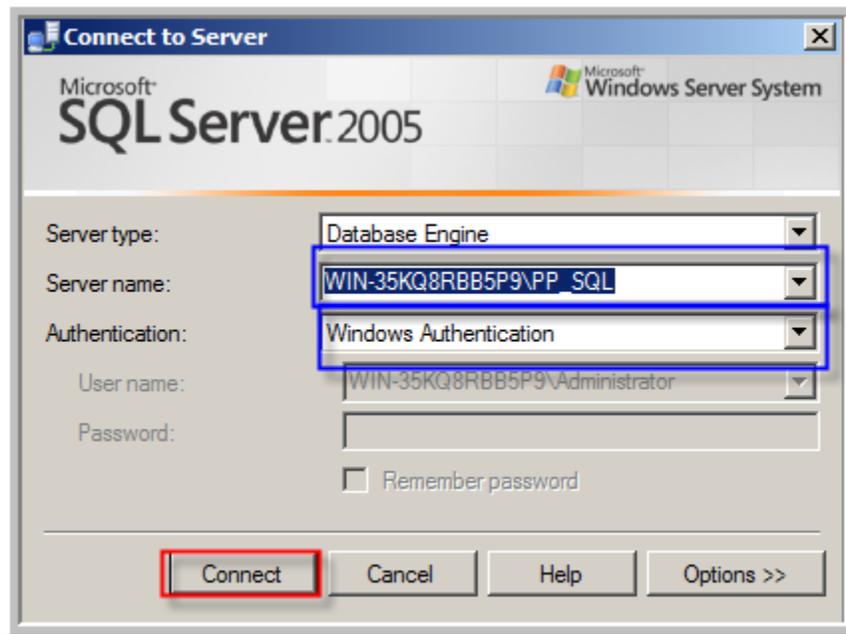
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Backup LytecMD Database and Ppart

Before starting a LytecMD database upgrade, please complete a full backup of your SQL Server database and ppart directory. This backup should include everything you need to recreate your production environment. Do not continue the conversion until the backup is complete and verified.

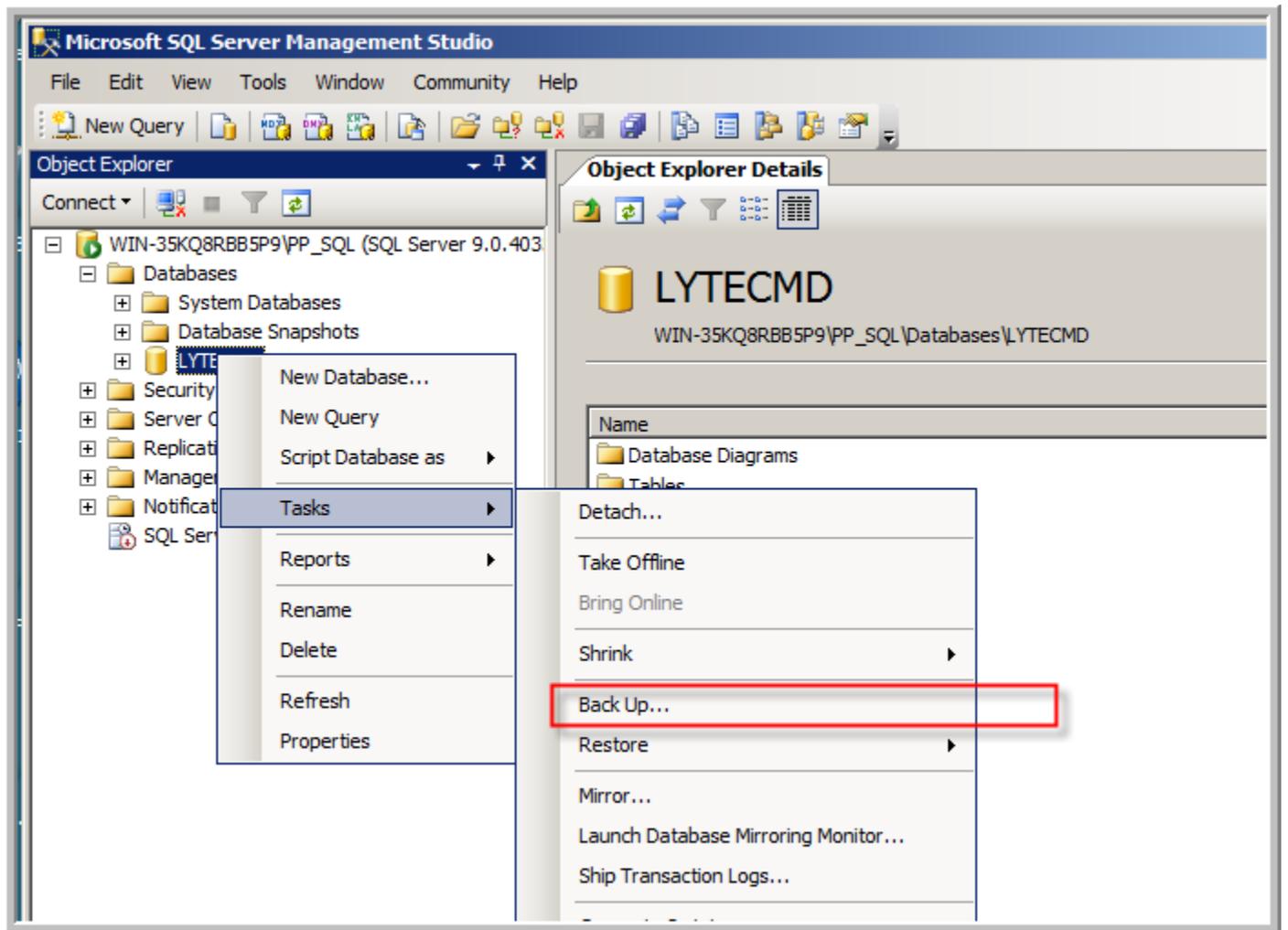
Backing up the SQL Database

1. You can manually back up your SQL Database, by opening Start > Programs > Microsoft SQL Server 2005 > SQL Server Management Studio.
2. Log into the PP_SQL instance name under your Server drop-down menu, select Windows Authentication, and then click Connect.

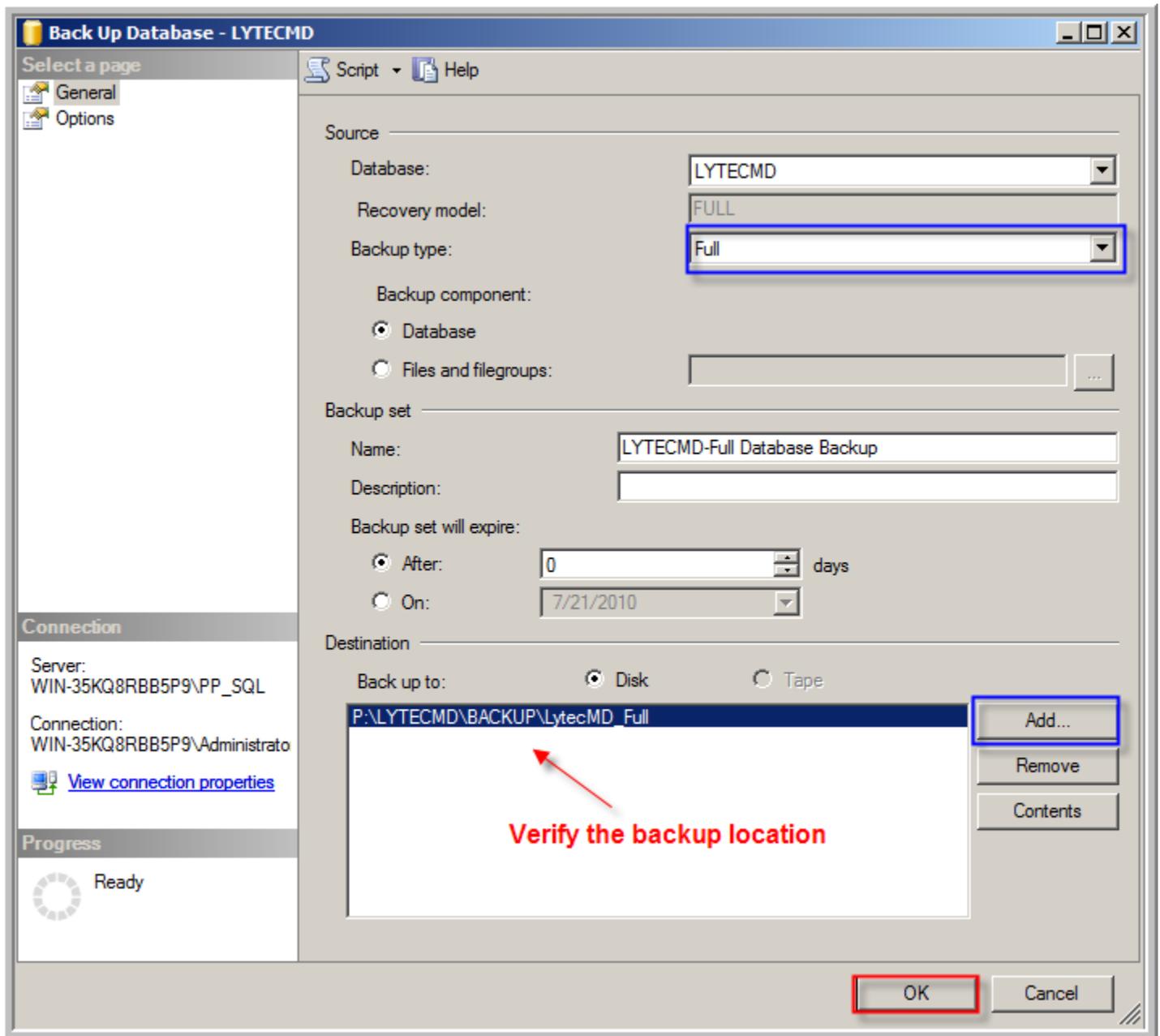


3. Expand "Databases" on the left panel under the Object Explorer window and select your LytecMD named database.

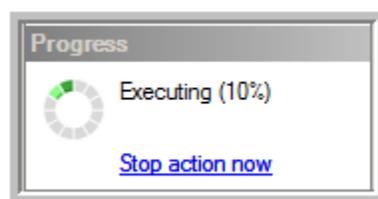
4. Right-click on your database and select Tasks > Backup



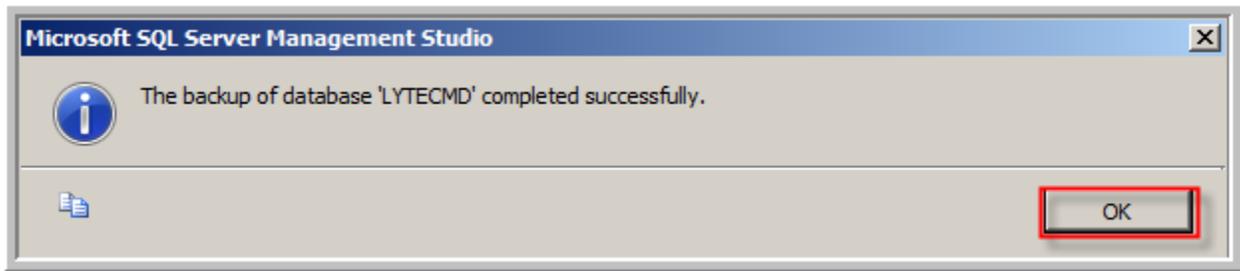
- From the Backup Database window, be sure the correct database is selected and that you have the Full Backup option selected. Under the destination, select the correct destination of your backup files – to change the destination, click Add. Otherwise, you can click Ok to start the backup.



- The backup progress can be located in the bottom left part of the window:

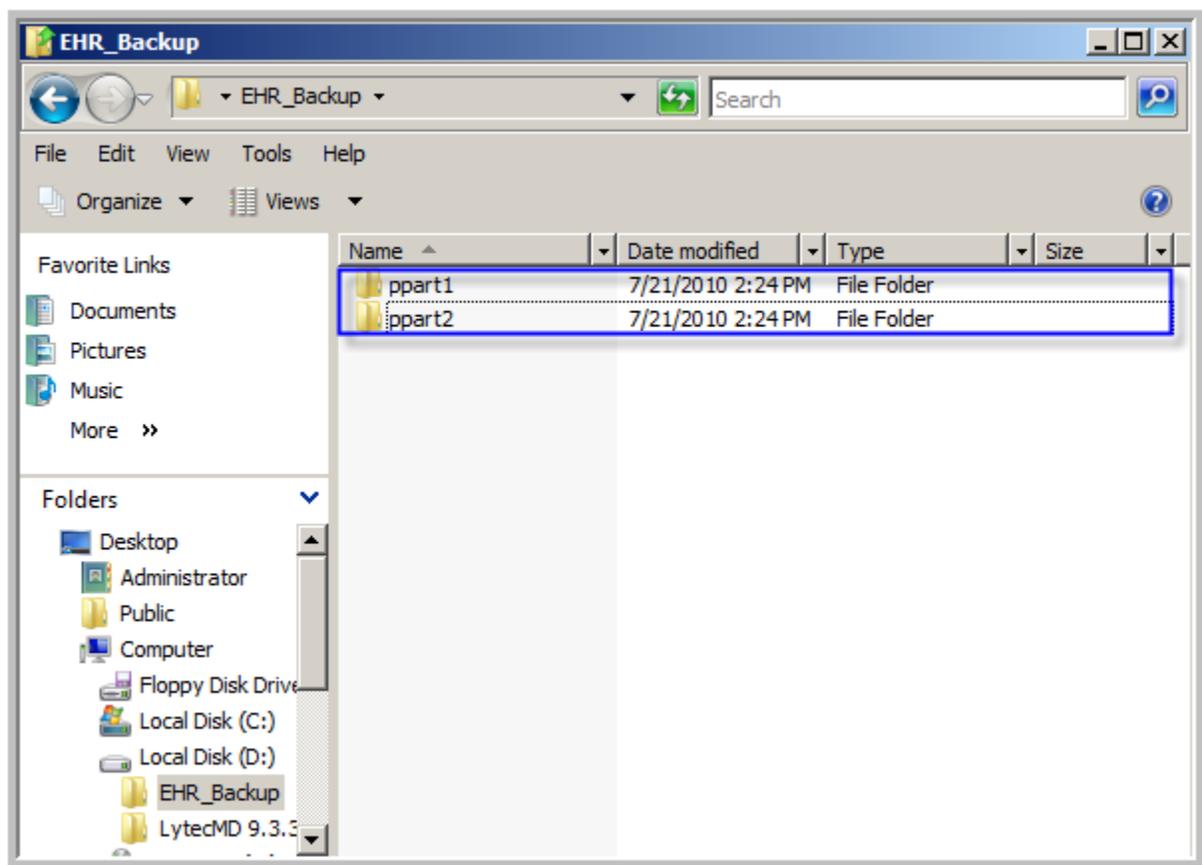


7. You will receive confirmation when the backup is complete, click Ok. Close SQL Management Studio.



Backup the Ppart Directory

1. Browse to you P:\ directory and locate your Ppart folder from Windows Explorer.
2. Right-Click on the Ppart folder and select Copy
3. Locate a backup location, like an external hard drive, tape backup, flash drive, or network resource. Once selected right-click within the drive (i.e. Z:\EHR_Backup) and Paste the copy of Ppart into the folder. It is suggested you rename the backup, something unique as you may copy more instances of Ppart to this directory.



Pre-Installation Steps for All Upgrades

Before upgrading to Lytec MD version 9.4 SQL Server you must save the files located in the files folder on Lytec MD SQL Server 9.4 Conversion CD to the Microsoft SQL Server folder on the computer that has SQL Server installed. The Microsoft SQL Server folder you save the file in depends on whether your site is using a 32-bit or 64-bit operating system and whether your site is using Microsoft SQL Server 2005 or 2008.

If your site is using a 32-bit operating system:

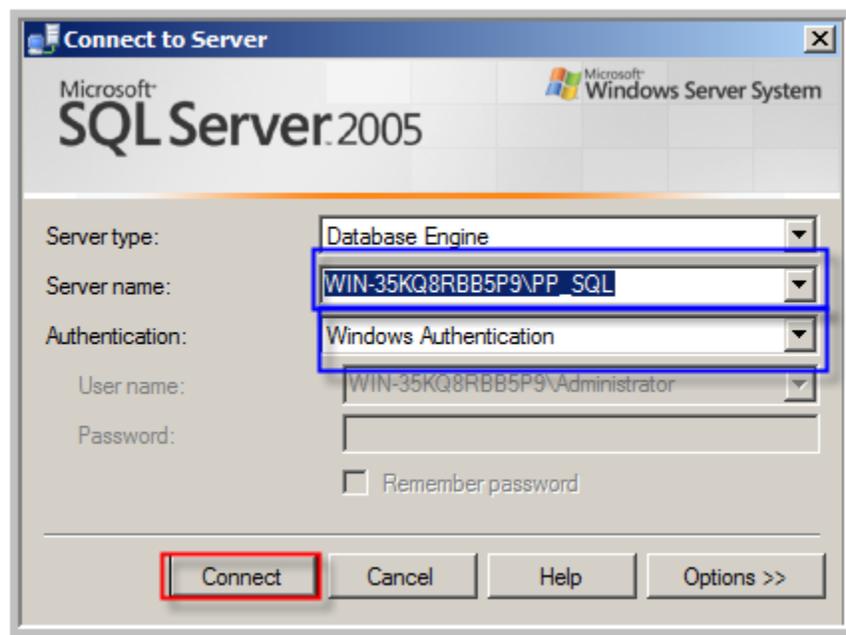
1. Insert the Lytec MD SQL Server 9.4 Conversion CD (or later) into the CD-ROM drive.
 2. Open Windows Explorer and browse to your CD-ROM drive.
 3. Open the Files folder:
- SQL Server 2005 sites only: Copy the PracticePartnerSQL93Convert.dll file to C:\Program Files\Microsoft SQL Server\90\Tools Binn
 - SQL Server 2008 sites only: Copy the PracticePartnerSQL93Convert.dll file to C:\Program Files\Microsoft SQL Server\100\Tools Binn

If your site is using a 64-bit operating system:

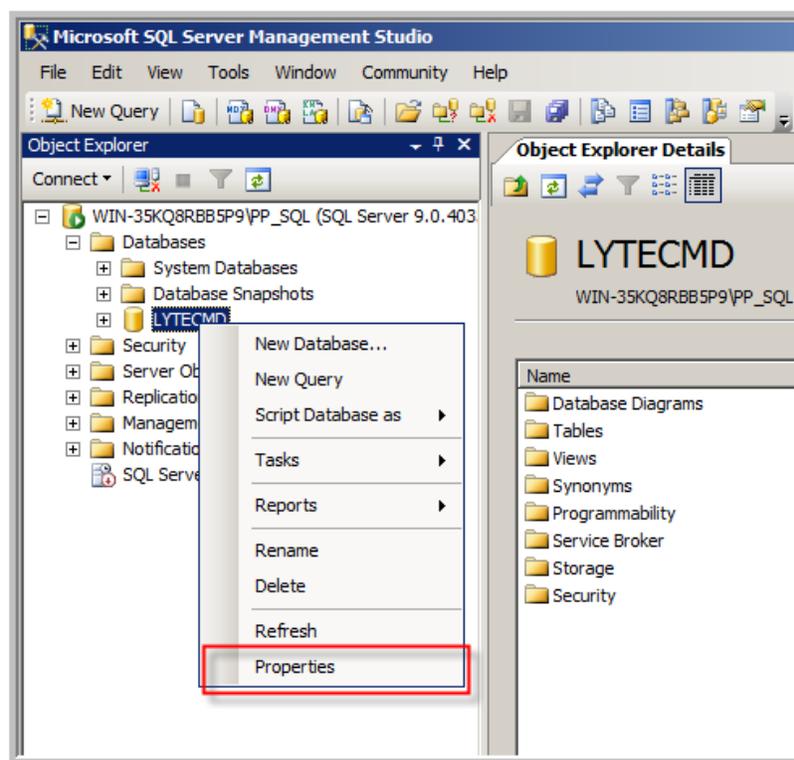
1. Insert the Lytec MD SQL Server 9.4 Conversion CD (or later) into the CD-ROM drive.
 2. Open Windows Explorer and browse to your CD-ROM drive.
 3. Open the Files folder:
- SQL Server 2005 sites only: Copy the PracticePartnerSQL93Convert_x64.dll file to C:\Program Files (x86)\Microsoft SQL Server\90\Tools Binn
 - SQL Server 2008 sites only: Copy the PracticePartnerSQL93Convert_x64.dll file to C:\Program Files (x86)\Microsoft SQL Server\100\Tools Binn

Change the SQL Database Recovery Model

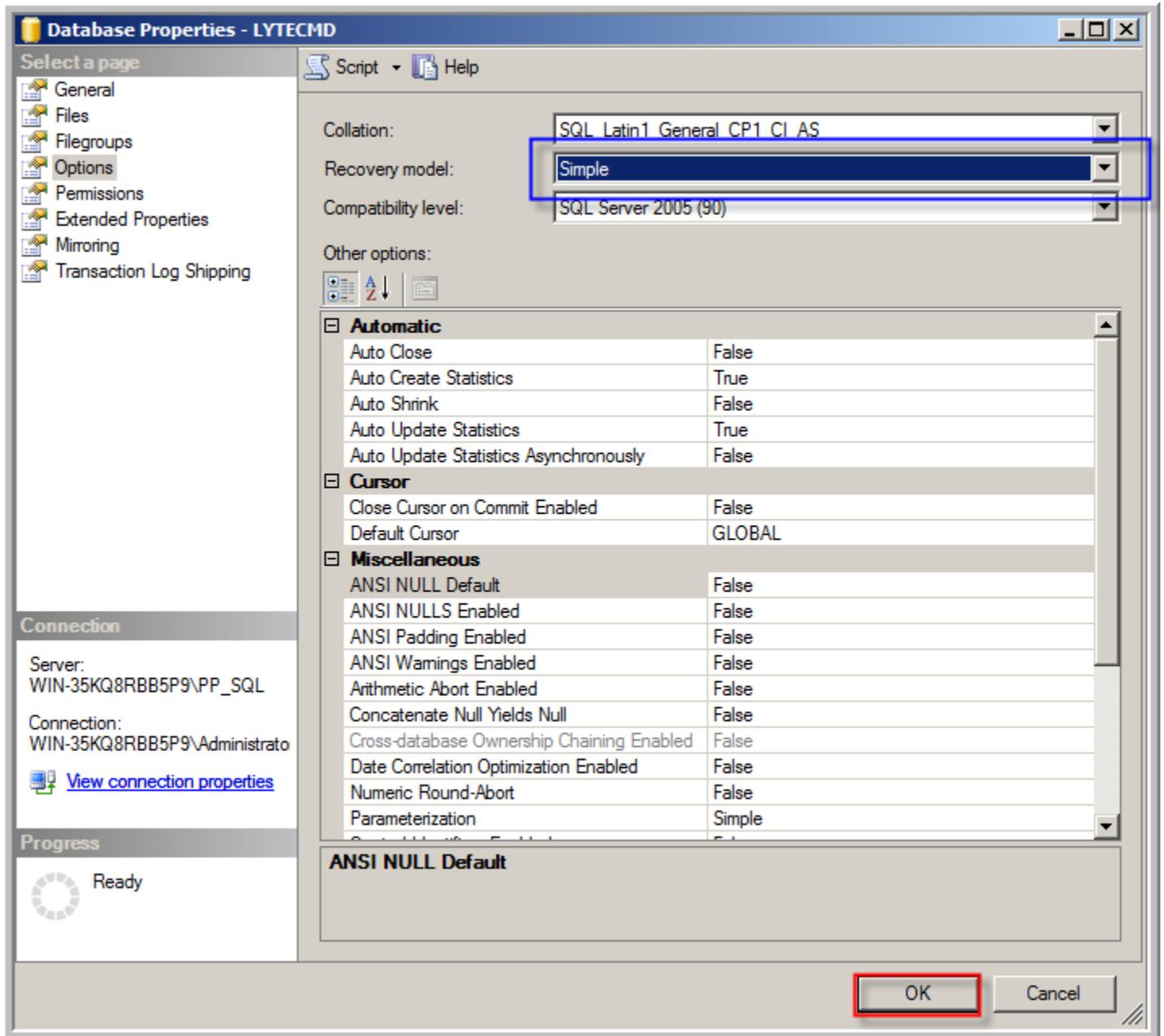
1. Log into the PP_SQL instance name under your Server drop-down menu, select Windows Authentication, and then click Connect.



2. Expand "Databases" on the left panel under the Object Explorer window and select your LytecMD named database.
3. Right-click on your database name and select Properties.

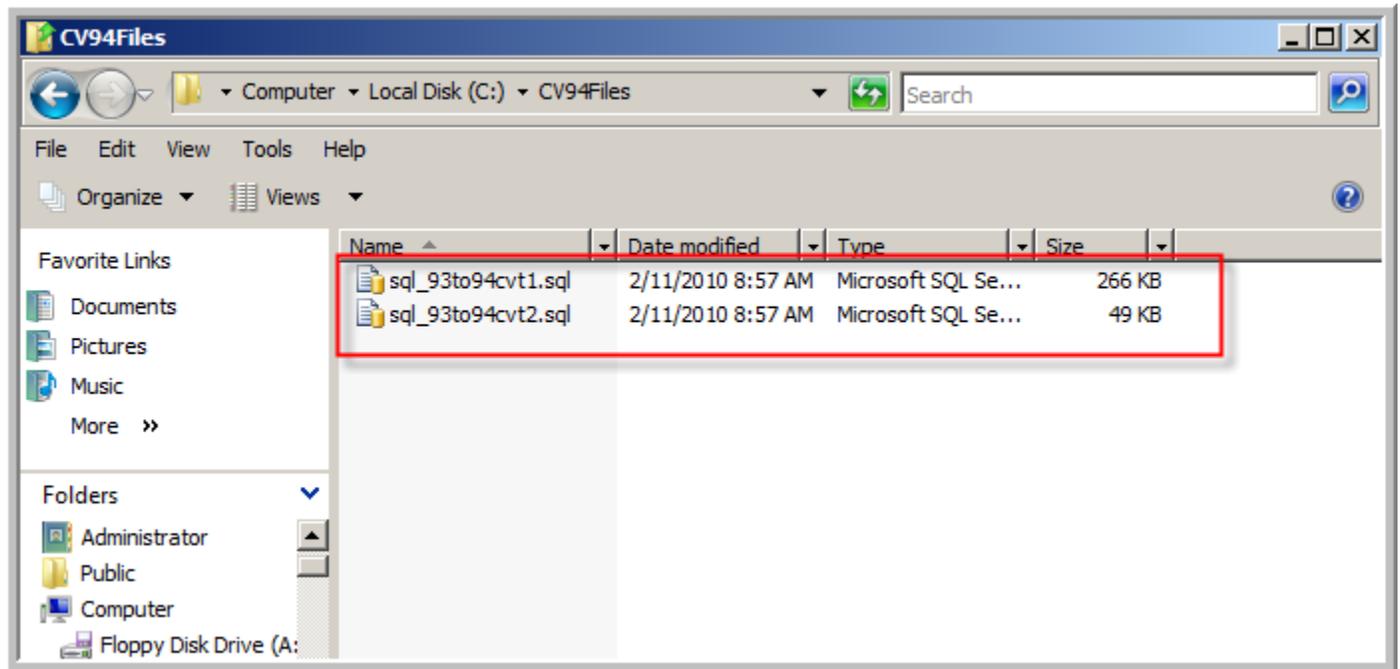


4. Within the Database Properties Window select Options.
5. Select "Simple" from the Recovery List drop-down menu and then click Ok.

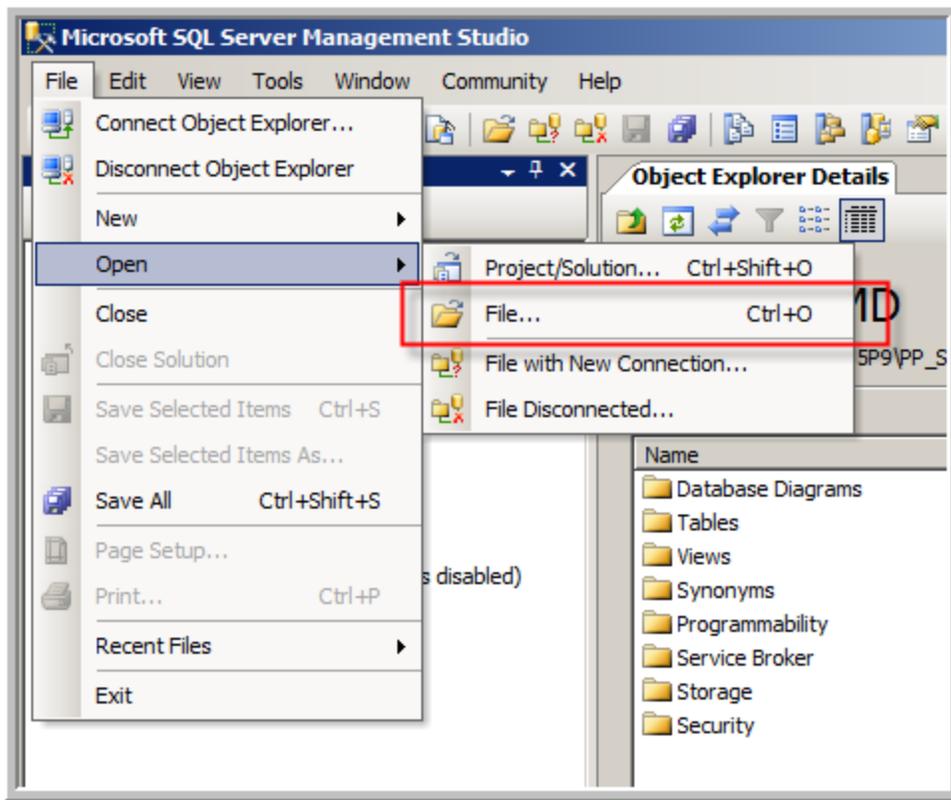


Starting the Upgrade Installation

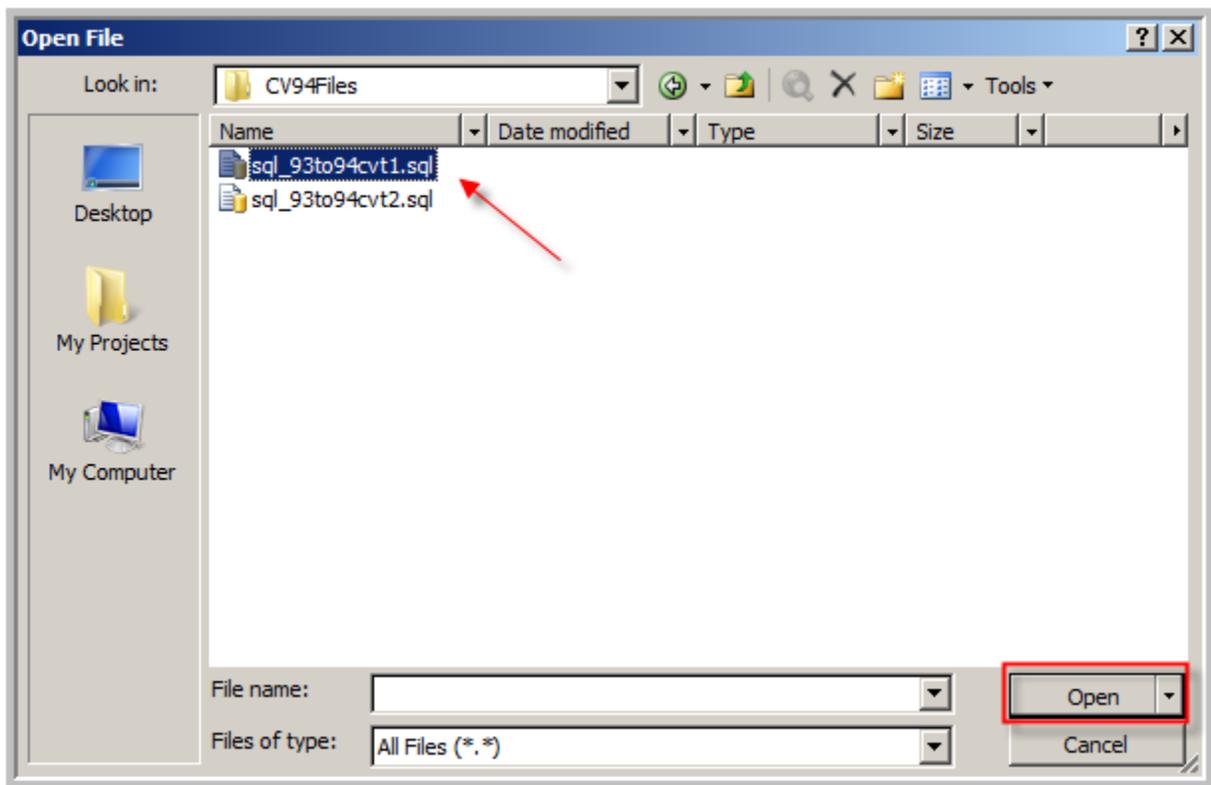
1. Insert the Lytec MD SQL Server 9.4 Conversion CD (or later) into the CD-ROM drive.
2. Open Windows Explorer and browse to your CD-ROM drive.
3. Copy the 93to94 folder to a directory other than the Lytec MD directory. For example, use C:\CV94Files. These folders contain the scripts and files needed for conversion.



4. Open SQL Server Management Studio and connect to the PP_SQL Instance.
5. Locate the database under the Object Explorer window. In this case, the database name is LYTECMD.
6. Go to File > Open > File

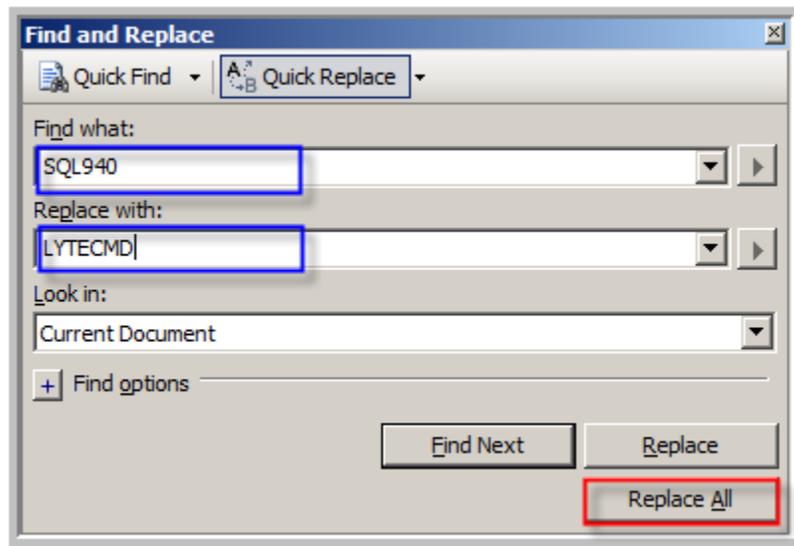


7. On the Open File window, browse to the location where you saved the CVT.sql scripts. In this case they are located under C:\CV94Files. Select the “sql_93to94cvt1.sql” file and then click Open.

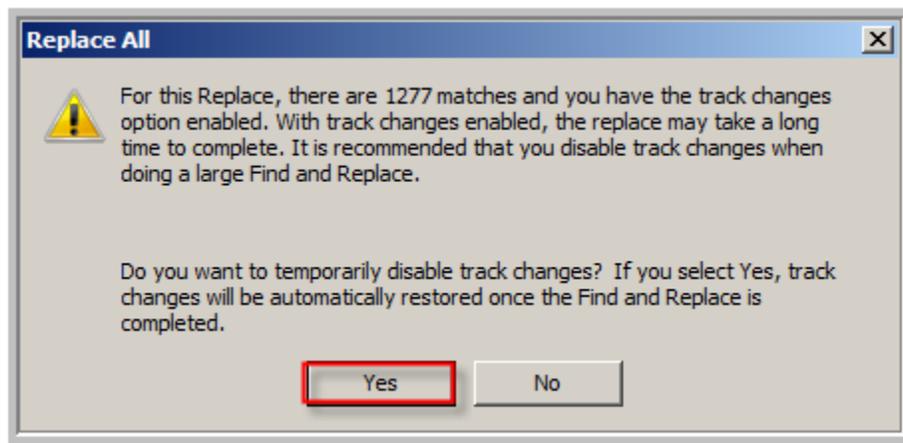


8. **IMPORTANT:** You will need to replace the SQL940 with your database name. In this case, SQL940 will be replaced to LYTECMD. Be sure to acknowledge if your database name is case-sensitive. You

can run a “Find and Replace” by hitting: Ctrl + H on your keyboard. Enter SQL940 in the “find what” selection and “replace with” you can place the database name, and then click Replace All.



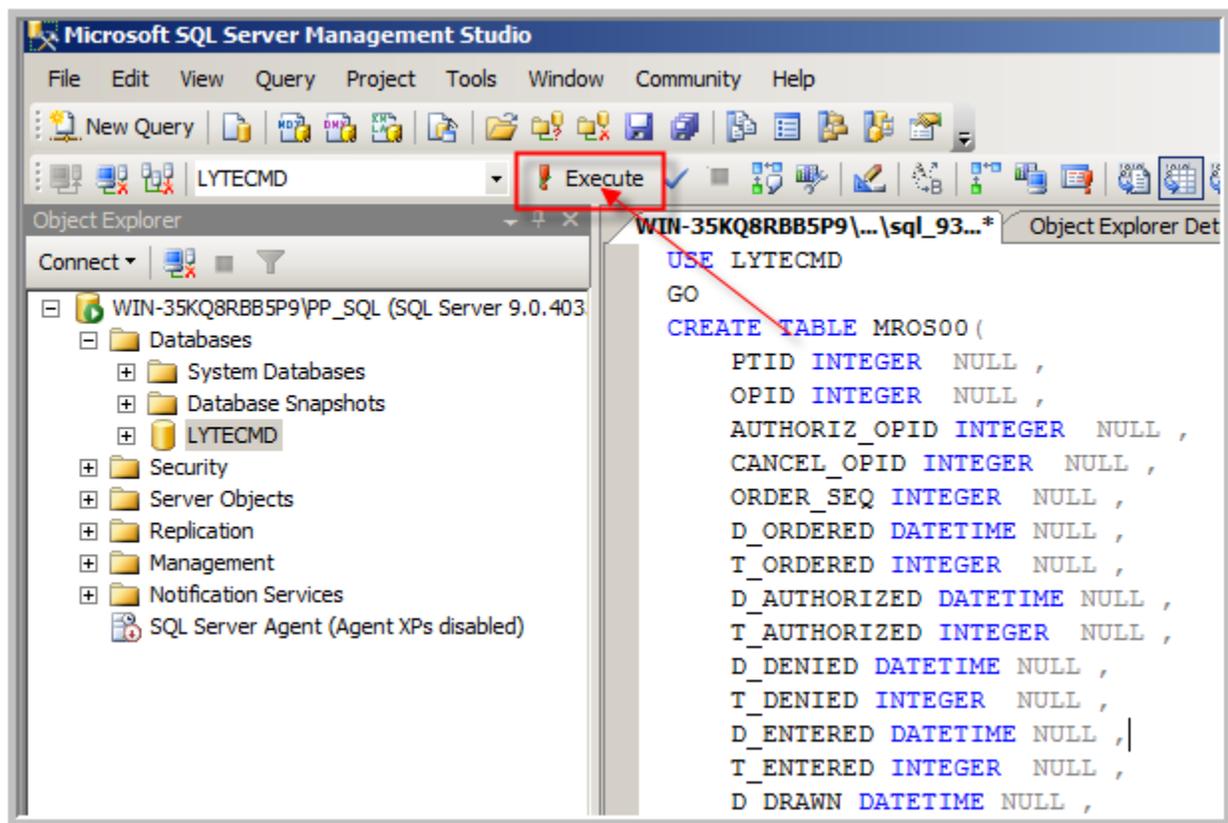
9. On the Replace all window, click Yes to the track changes.



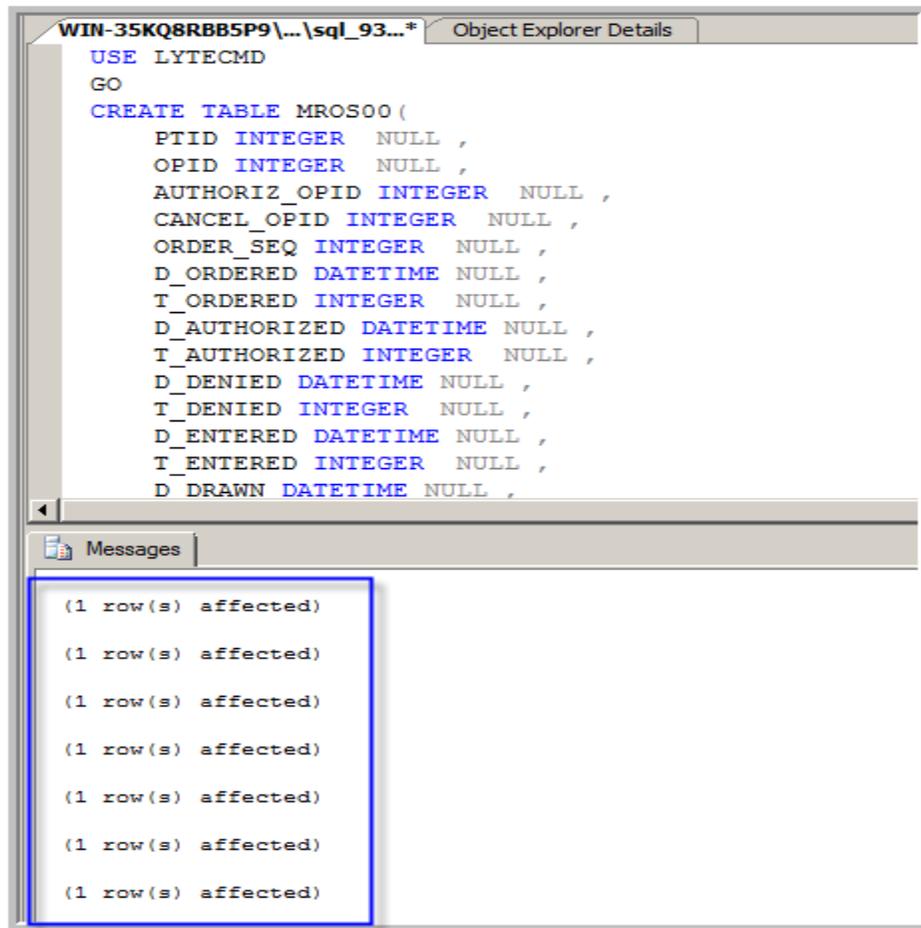
10. Close the Find and Replace window, by clicking the little “X” in the upper right corner of the Find and Replace window.

11. Verify that SQL940 has been updated to the database name.

12. Execute the script, by clicking execute on the toolbar. Make sure your cursor is at the very beginning of the script before clicking Execute.



13. Once the script has ran, you should see that the rows were affected in the Message Status window below.

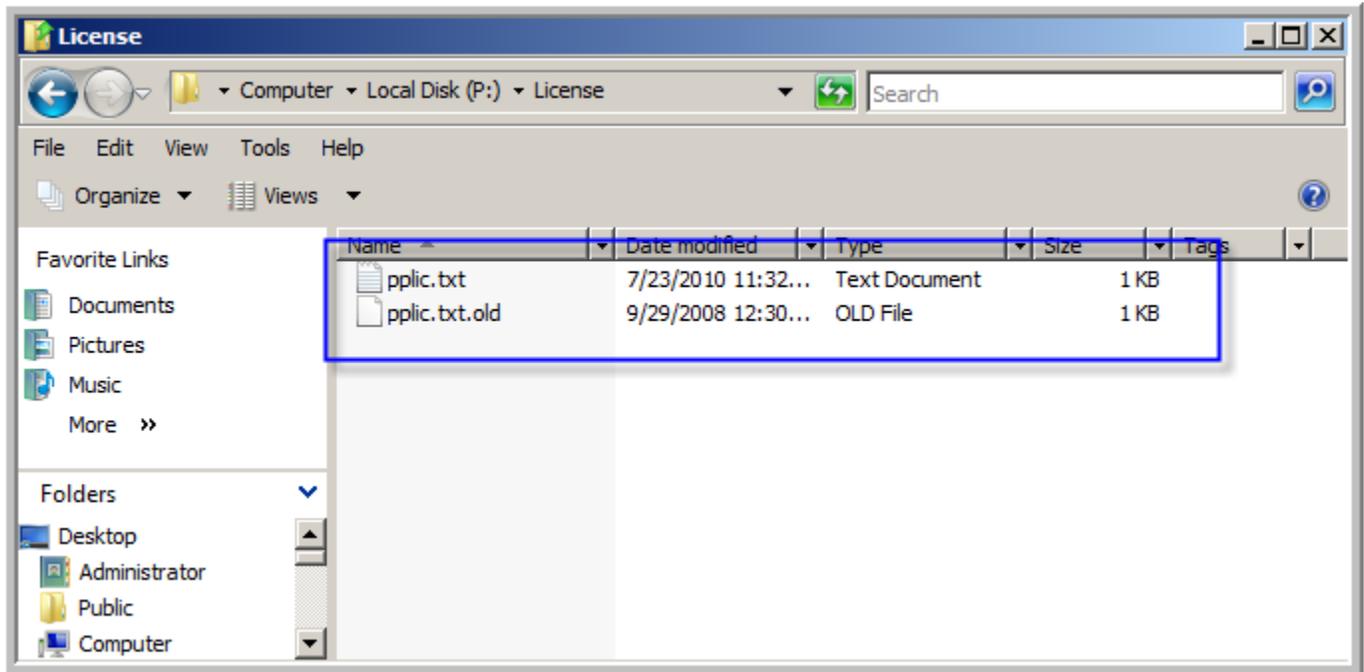


Please note any errors found at this point indicate a problem. Please ask for support from Lytec MD's SQL Server Implementation Specialist or Technical Support Representative.

Install the LytecMD 9.4 Patient Records

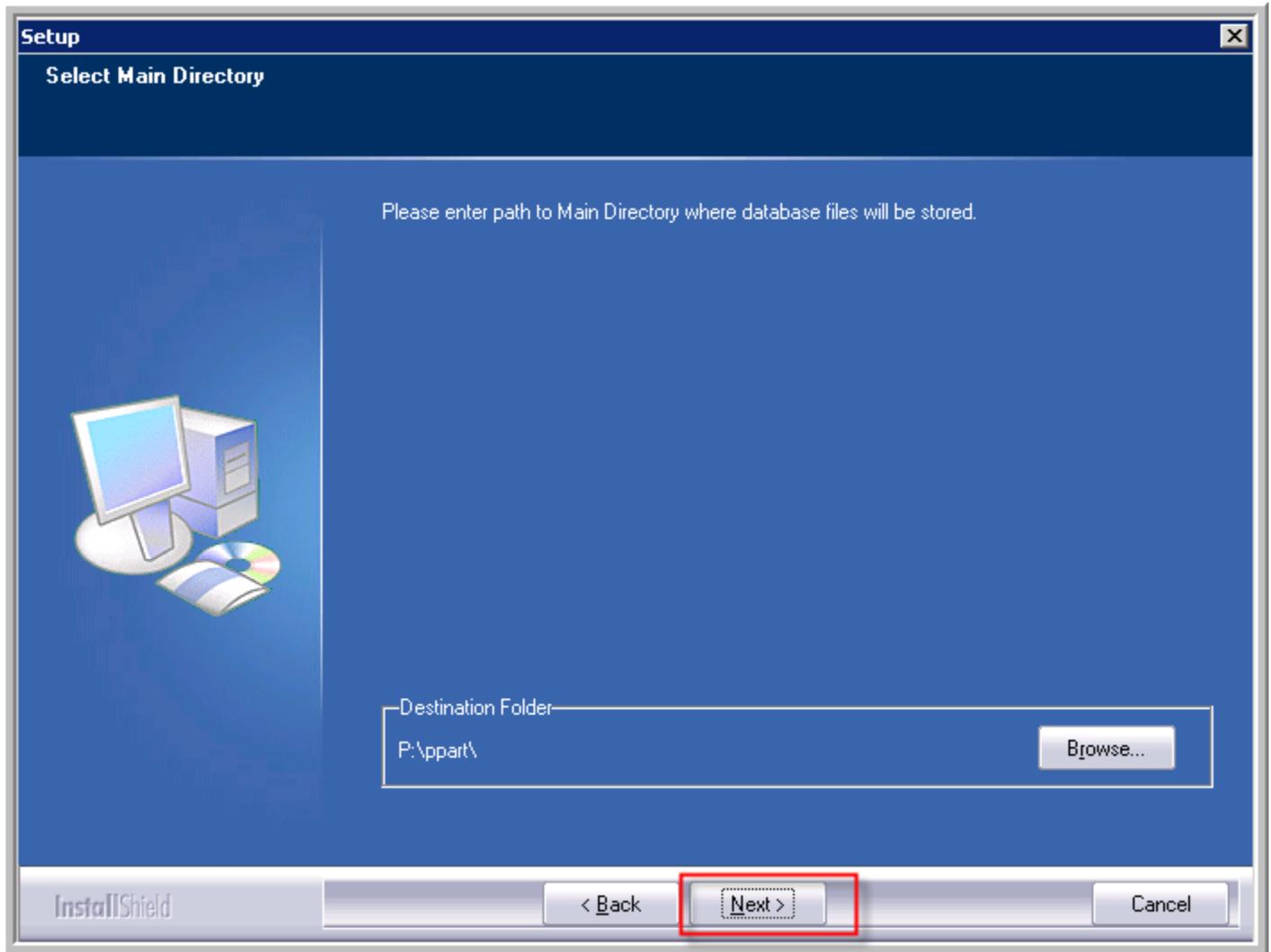
You will need to make sure you have the latest LytecMD 9.4 license available. You can contact your Client Care Representative for more information. The license file is also available for download from the Practice Partner Support Website at <https://support.practicepartner.com>.

1. Locate the folder named **License** on the root of the P:\ drive. You will need to rename the previous LytecMD license file to (pplic.txt.old) located within P:\License. Once you have verified that the license file has been renamed, and then you can place the new 9.4 license file in the P:\License directory.

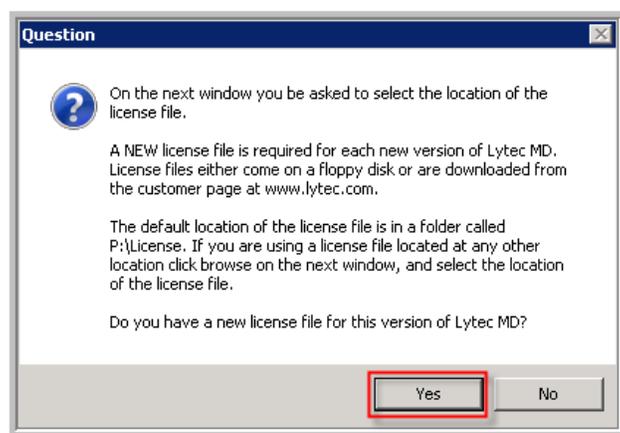


2. Insert the LytecMD Core install Disc, the Autorun should automatically start the installation. If not you can manually open the **Ppartprw** folder and run **Setup.exe** from the disc contents in Windows Explorer. It will request to install .net1.1 SP1 which is located at root setup.exe
3. Click Next to start the installation of Patient Records.
4. Accept the License Agreement

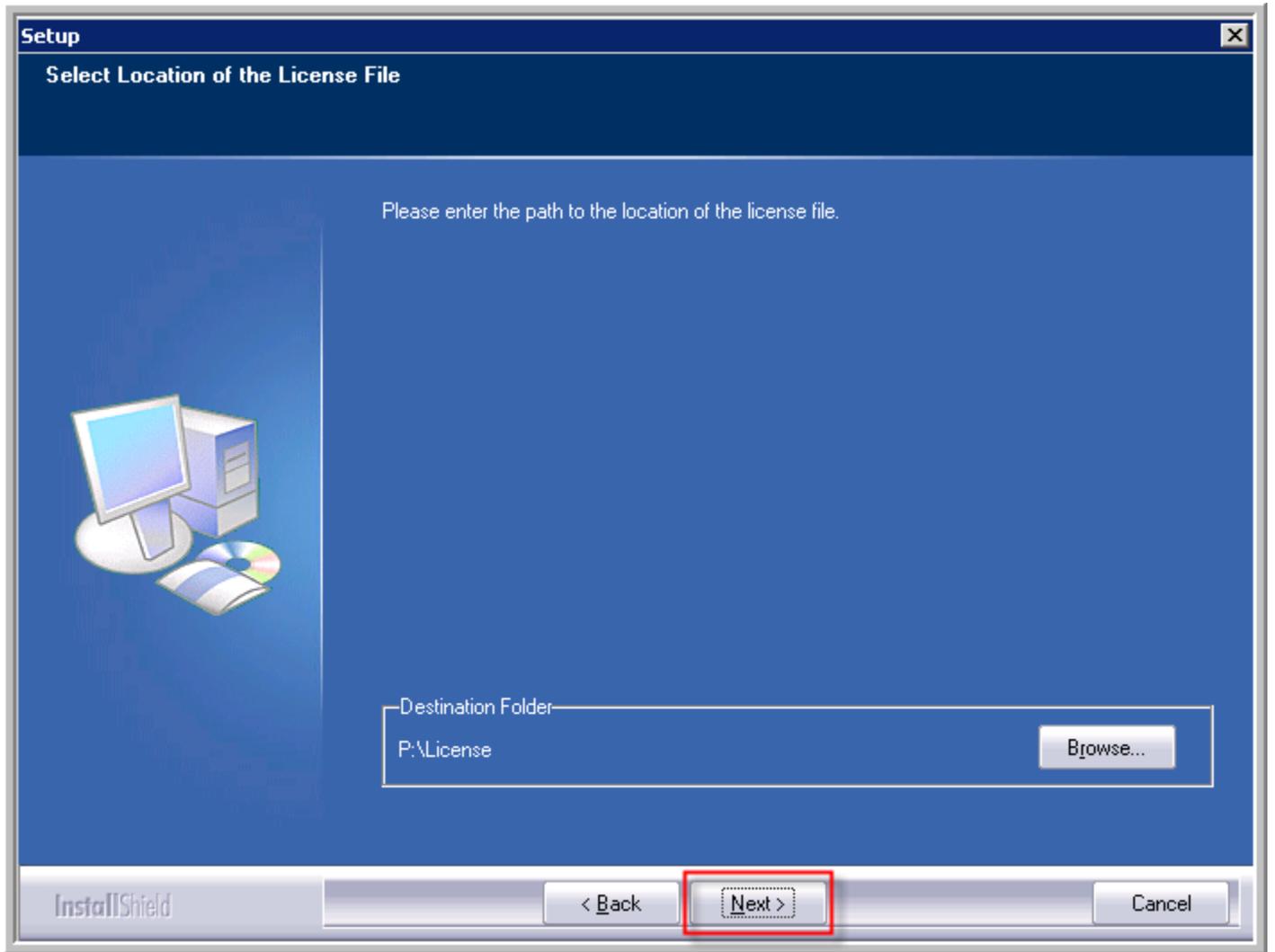
5. Enter the path of your ppart directory; it will default as P:\ppart. You need to point to the existing Ppart directory that you are upgrading.



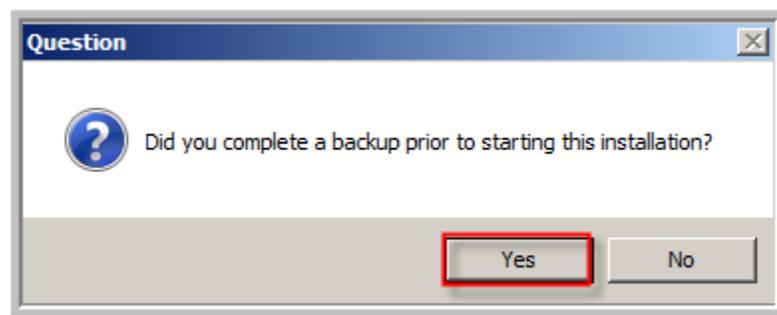
6. The installer will next ask if you have a license file (pplic.txt). Click Yes to continue.



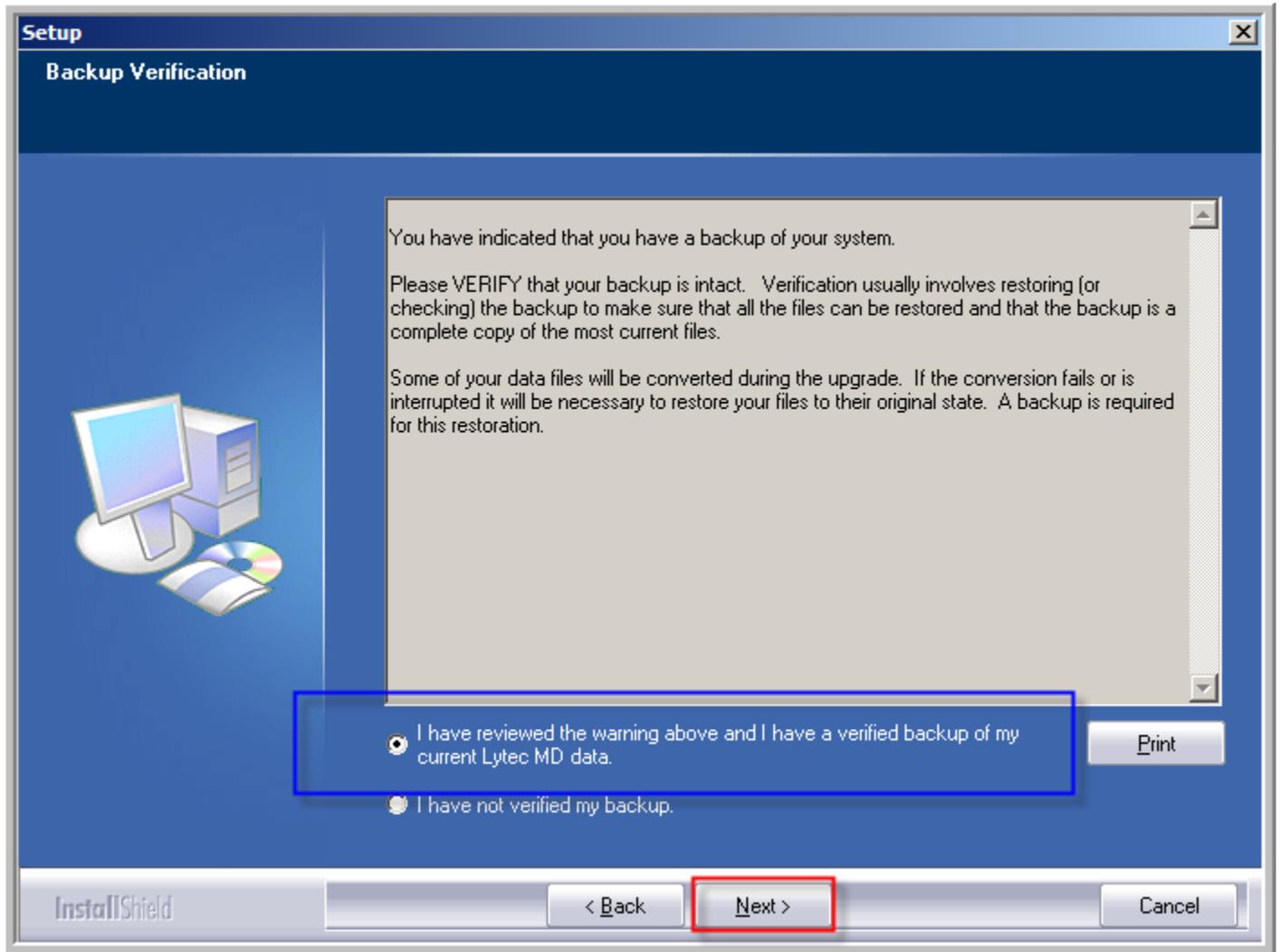
7. Once you have the license directory located P:\License, then click Next.



8. Click Yes, on the prompt if you have a backup. If you do not have a backup please refer to the [LytecMD Backup instructions](#) in this document.

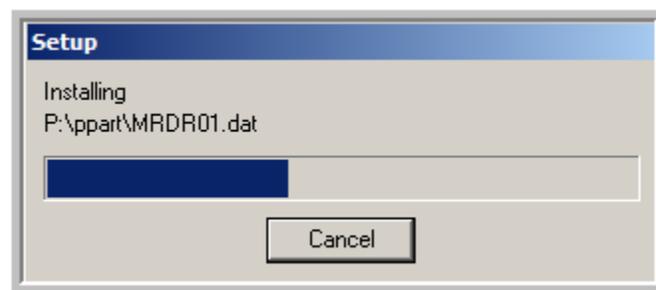


9. Select “I have reviewed the warning...” radio button and click Next.

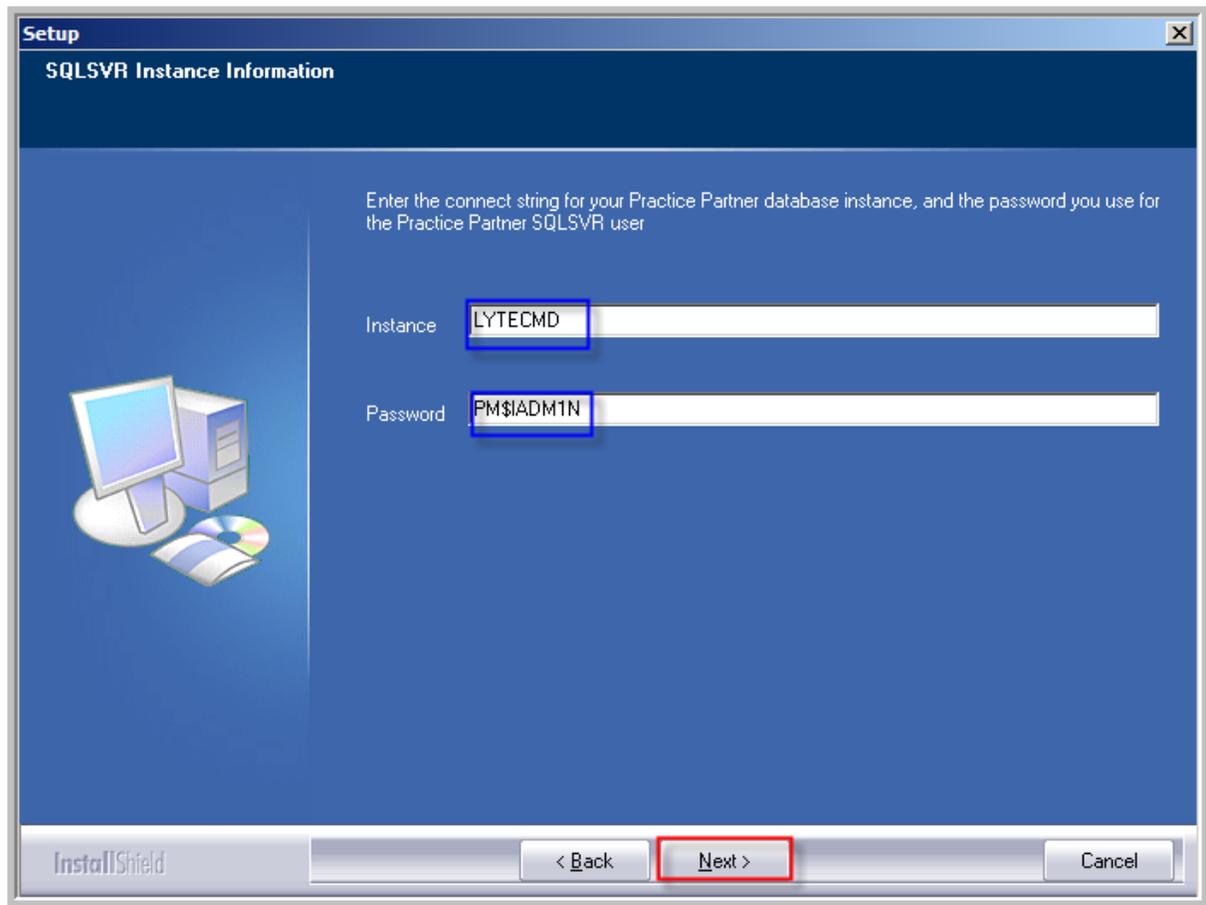


10. Select Yes or No, if you want to keep the current demo files. If you do not use the demo, it is suggested, that you select No. The installer will create new demo files.

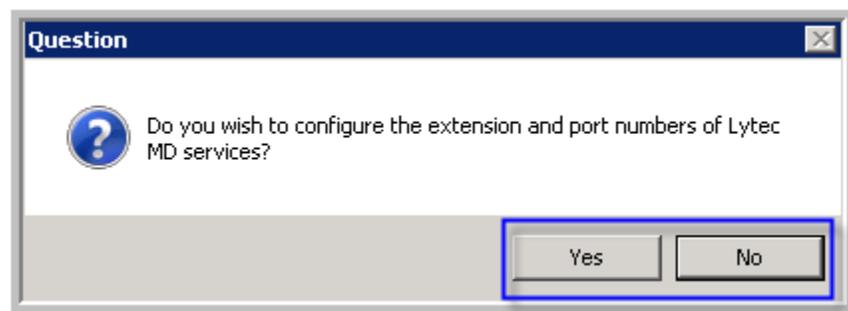
11. Please wait as the installer, updates the files



12. For the SQL Server Instance Information, you will need the Database Name and the Connection password, in this case its LYTECMD and PM\$IADM1N and then click Next.



13. Click Yes or No to configure the port numbers and extension for LytecMD. The default ports used for the application are 50501 and 50502.

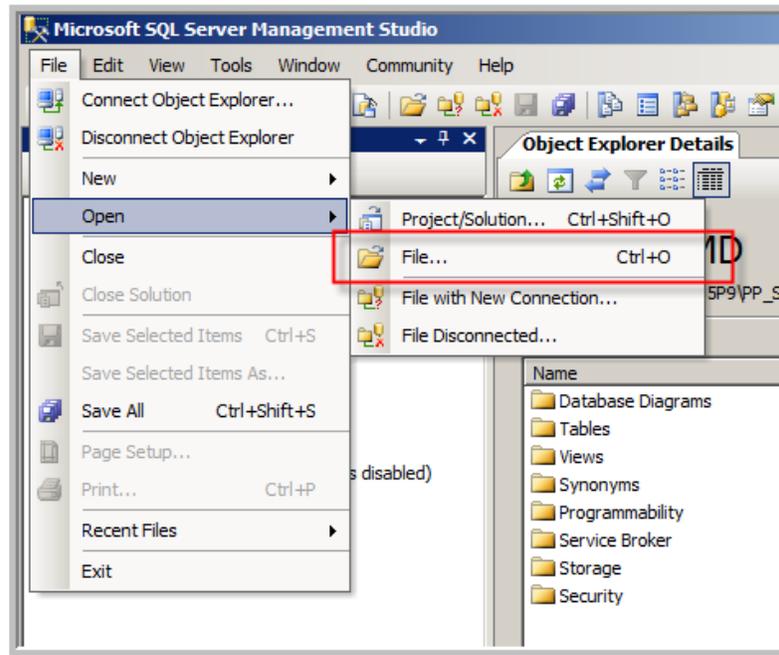


14. Click No, on the prompt to Activate the LytecMD clearinghouse. All Clearinghouse activation will be handled by the EDI Services.
15. Click Ok, on the DemSch and BillCode messages to configure manually. Please refer to the "PPConnect_DemSch_Billing_UserGuide.pdf" document on the CD for how to configure the Cross-reference Files.
16. Click Yes or No on the ReadMe prompt.
17. Click Ok, to complete the installation.

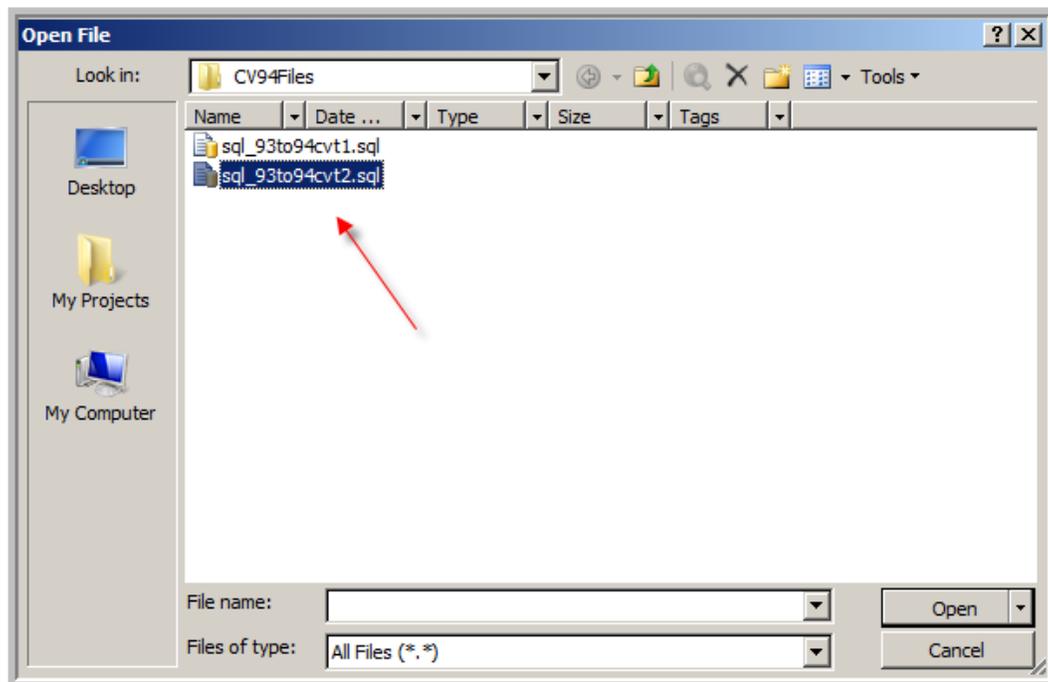
18. Verify no errors or unusual reports by viewing the following in the PPart directory: The convert93.log, pht32.err, perror.fl, and ppcpy.log files. Please note, any errors found at this point indicate a problem. Please contact customer support for further assistance.

Applying the Final SQL Script

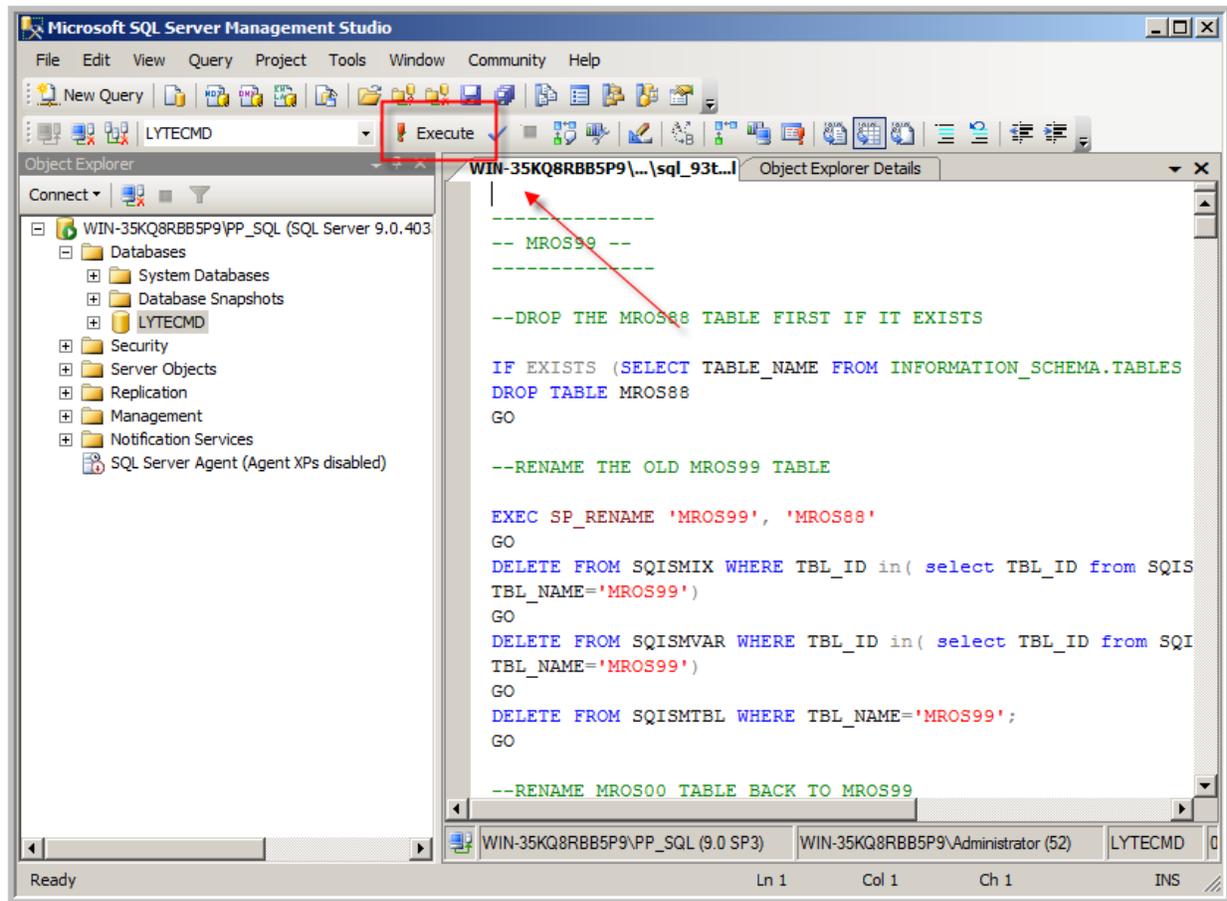
1. Open SQL Server Management Studio and connect to the PP_SQL Instance.
2. Locate the database under the Object Explorer window. In this case, the database name is LYTECMD.
3. Go to File > Open > File



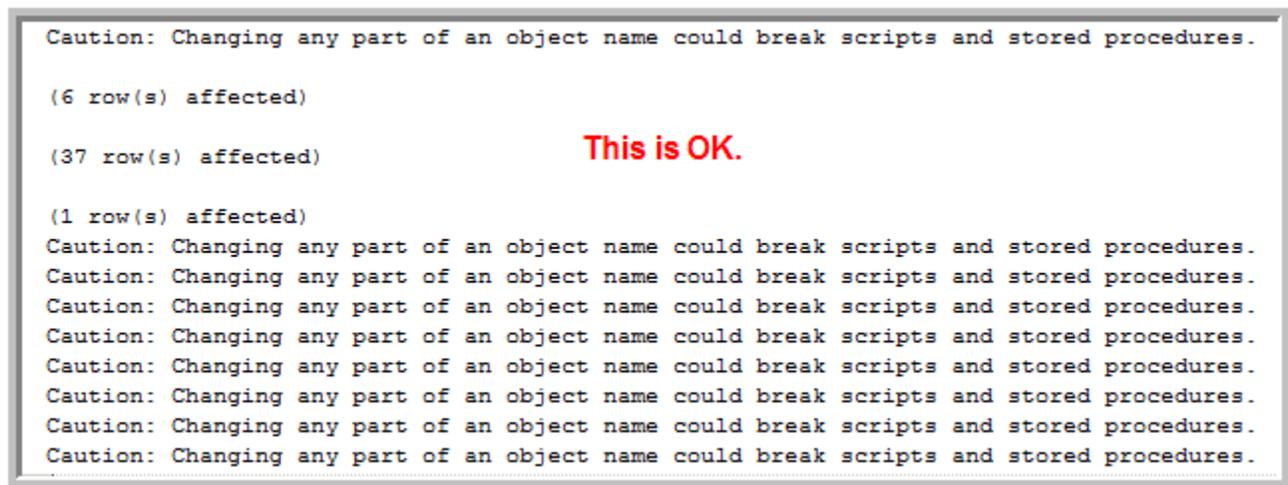
4. On the Open File window, browse to the location where you saved the CVT.sql scripts. In this case they are located under C:\CV94Files. Select the "sql_93to94cvt2.sql" file and then click Open.



- Execute the script, by clicking execute on the toolbar. Make sure your cursor is at the very beginning of the script before clicking Execute.



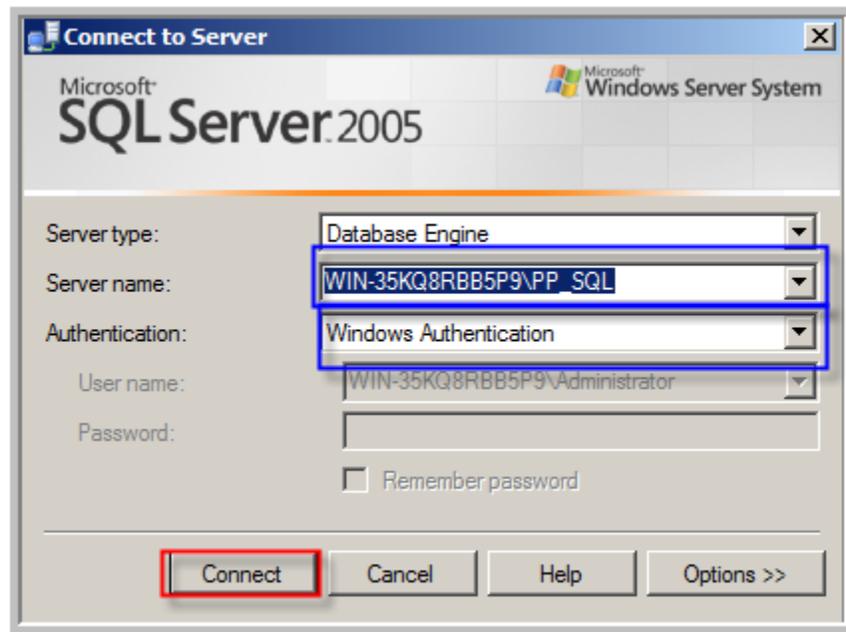
- You will receive confirmation once the script has been executed and may see a window like the one below. This message is ok and is normal.



Please note any errors found at this point indicate a problem. Please ask for support from Lytec MD's SQL Server Implementation Specialist or Technical Support Representative.

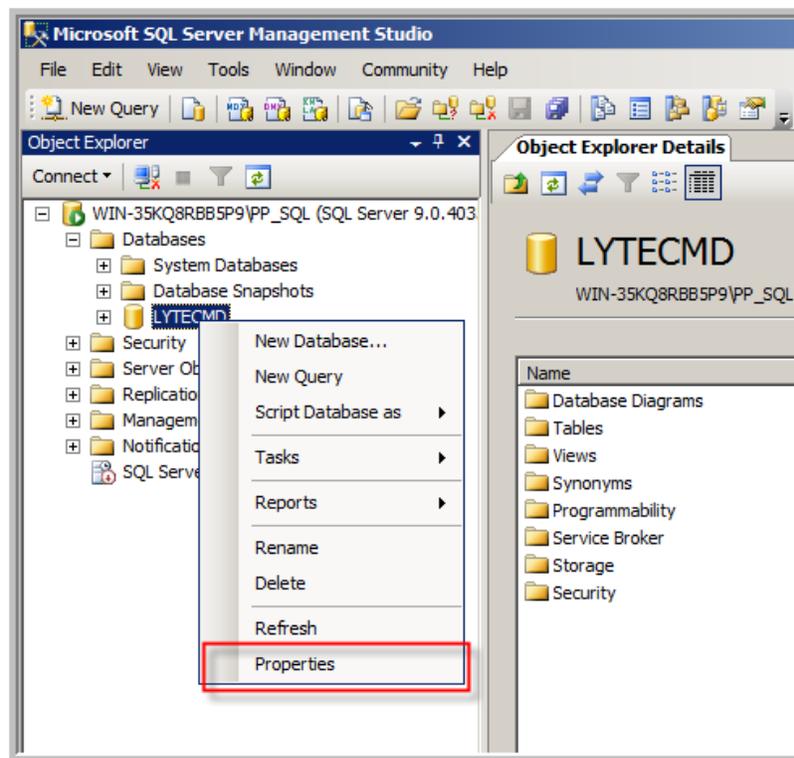
- Make a full backup of the database. Refer to the section [Backing Up and SQL Database](#) for more information.
- The upgrade is now complete. Change the SQL database recovery model back to Full.

9. Log into the PP_SQL instance name under your Server drop-down menu, select Windows Authentication, and then click Connect.

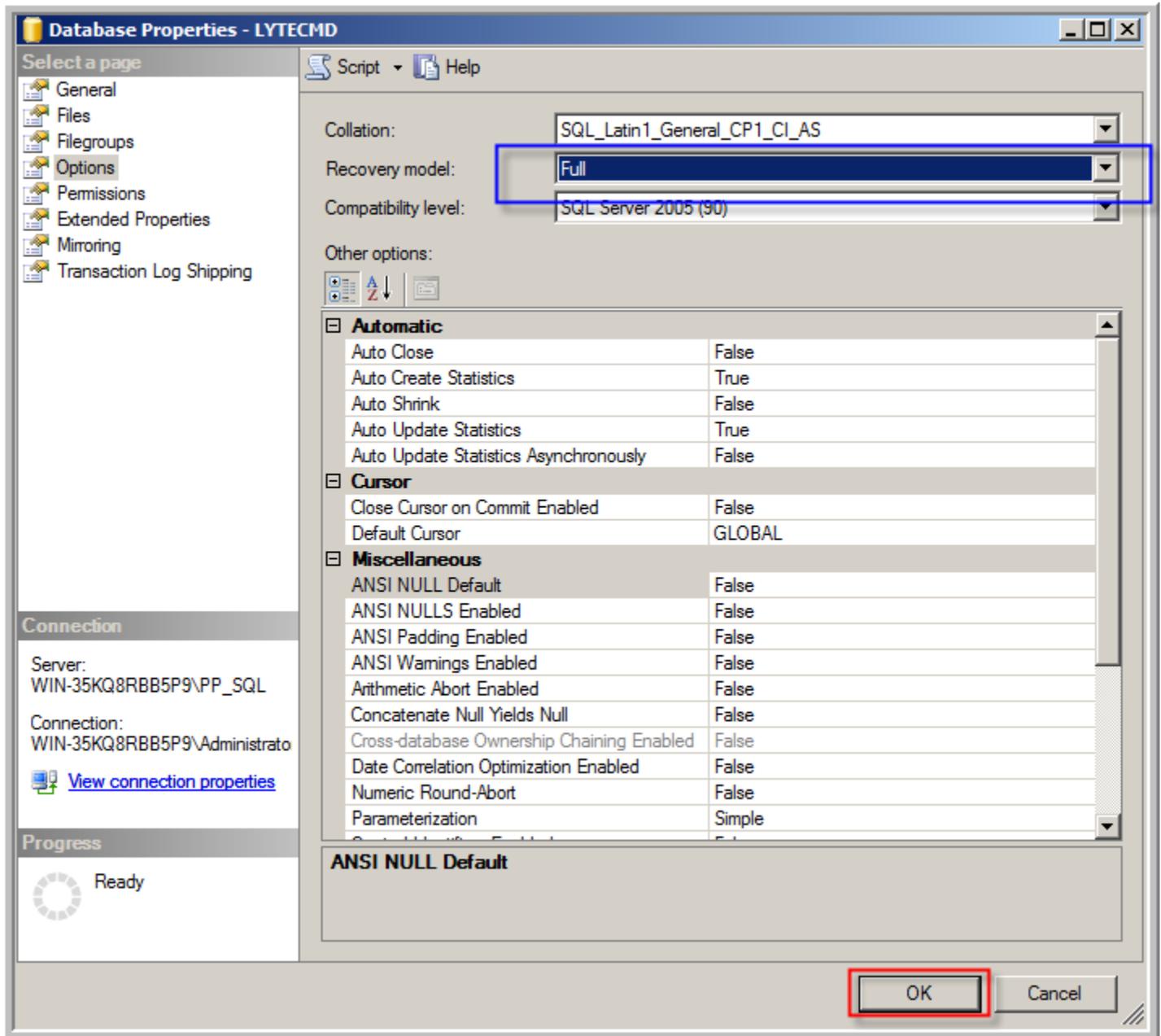


10. Expand “Databases” on the left panel under the Object Explorer window and select your LytecMD named database.

11. Right-click on your database name and select Properties.



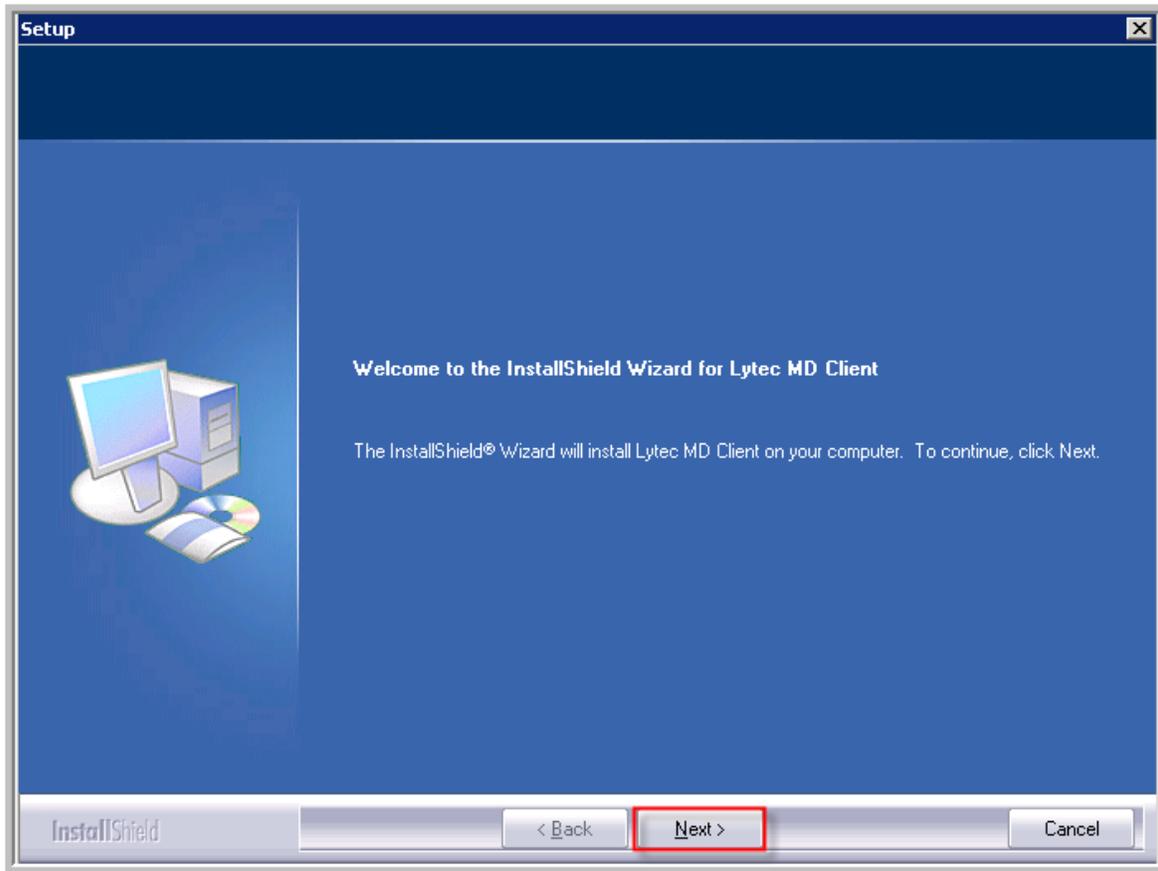
12. Within the Database Properties Window select Options.
13. Select "Full" from the Recovery List drop-down menu and then click Ok.



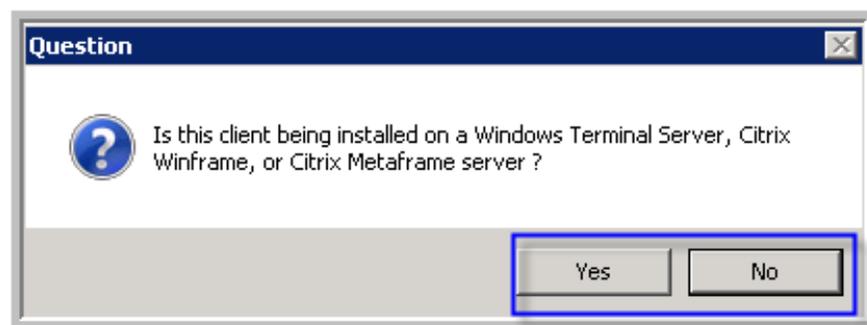
14. If your site is using an outbound interface, you need to run the ppreindex Utility for your MRZL99 table after upgrading to 9.4. Please note if you previously upgraded to 9.3.2 or 9.3.3 and have already run this utility you do not need to run the utility again. If you are upgrading from 9.3.1 or did not run the utility when upgrading to 9.3.2 or 9.3.3 you must run the utility. See **Appendix A** for step-by-step instructions.

Installing the LytecMD Ancillary Products & Client

1. First, install all ancillary products before installing the client.
2. It is suggested you uninstall the previous LytecMD 9.3x client first from Add/Remove Programs, and then continue with 9.4 Client install.
3. Browse to P:\ppart\install\setup.exe
4. The installer will launch, and then click Next to continue.



5. Install to the default C:\PRWIN location or change it to another drive letter if desired, and then click Next.
6. The installation will install and update the files, please wait.
7. Click Yes or No to “Is this client being installed on a Windows Terminal Server, Citrix Winframe, or Metaframe server” depending on your network setup.



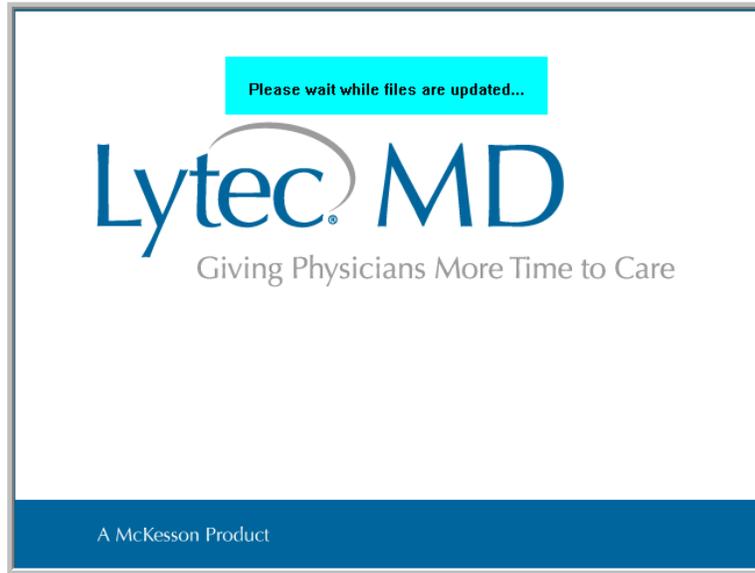
8. Click Next, on the Folder Selection window. The defaults are standard, but the folder selection can be changed.
9. Click Ok, on the setup complete.

10. You will have a LytecMD Client icon appear. You can add this to the Desktop by right-clicking on the icon and selecting Send To > Desktop (create shortcut).



11. Launch the client by double-clicking on the icon:

12. Allow the program to update files upon launch. This process can take up to 10 minutes.



13. Verify the PMSI Application and Data Server are started in the Windows Services Menu (services.msc)

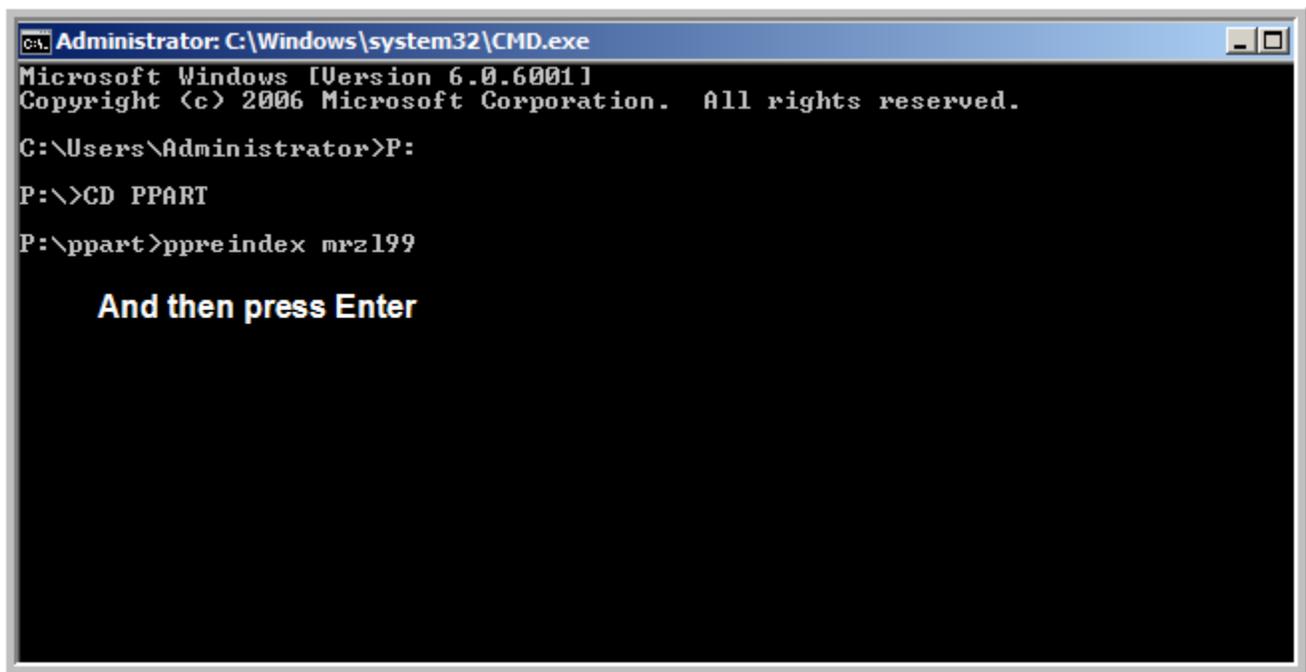
Appendix A: Running the PPreindex Utility

If your site is using an outbound interface, you will need to run the ppreindex.exe command from your \ppart directory to re-index your MRZL99 table after upgrading to 9.4. If you do not run this utility after upgrading to 9.4, your outbound interface will fail to process transactions until the re-index is performed.

IMPORTANT: You must shut down all inbound and outbound interfaces before running the ppreindex utility. Once the 9.4 upgrade is complete and you have run the utility, you can restart your interfaces.

To run the ppreindex utility:

1. Open a command line (DOS) prompt in the Lytec MD database directory (usually p:\ppart).
2. Type Ppreindex mrzl99
3. Press <Enter>.



```
C:\Windows\system32\CMD.exe
Microsoft Windows [Version 6.0.6001]
Copyright (c) 2006 Microsoft Corporation. All rights reserved.

C:\Users\Administrator>P:
P:\>CD PPART
P:\ppart>ppreindex mrzl99

And then press Enter
```