



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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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. <u>Do not</u> 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.

Connect to Server	×
SQL Serve	Windows Server System
Server type:	Database Engine
Server name:	WIN-35KQ8RBB5P9\PP_SQL
Authentication:	Windows Authentication
User name:	WIN-35KQ8RBB5P9\Administrator
Password:	
Connect	Remember password Cancel Help Options >>

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

Microsoft SQL Server Management Studio	
File Edit View Tools Window Community H	lelp
[🛄 New Query 📭 🕋 🜇 🖓 💦 📂 💜 🕯	4 🗐 🥥 🗈 🖻 隆 🎼 🖀 🔒
Object Explorer - 7 ×	Object Explorer Details
Connect 🕶 🖳 🛒 😰	
🖃 🐻 WIN-35KQ8RBB5P9\PP_SQL (SQL Server 9.0.403	
Databases The system Databases	
Database Snapshots	WIN-35KQ8RBB5P9\PP_SQL\Databases\LYTECMD
E Security New Database	
E Server C New Query	Name
E Replicati Script Database as	Database Diagrams
Manager Manager Manager Motificat Tasks	Detach
Reports	Take Offline
	Bring Online
- Rename	
	Shrink
Refresh	Back Up
Properties	Restore
	Mirror
	Launch Database Mirroring Monitor
	Ship Transaction Logs
11	

5. 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.

🧊 Back Up Database - LYTECM	
Select a page	🛒 Script 🝷 🚺 Help
General	
Options	Source
	Database: LYTECMD
	Recovery model: FULL
	Backup type:
	Backup component:
	 Database
	C Files and filegroups:
	Backup set
	Name: LYTECMD-Full Database Backup
	Description:
	Backup set will expire:
	After: 0 days
	On: 7/21/2010
Connection	Destination
Server: WIN-35KQ8RBB5P9\PP_SQL	Back up to: O Disk O Tape
Connection:	P:\LYTECMD\BACKUP\LytecMD_Full Add
WIN-35KQ8RBB5P9\Administrato	Remove
View connection properties	
Progress	Verify the backup location
Pandu Dandu	
neauy	
	OK Cancel

6. 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.

Microsof	t SQL Server Management Studio	×
1	The backup of database 'LYTECMD' completed successfully.	
B	OK	

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 and 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.



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:
- <u>SQL Server 2005 sites only</u>: Copy the PracticePartnerSQL93Convert.dll file to C:\Program Files\Microsoft SQL Server\90\Tools Binn
- <u>SQL Server 2008 sites only</u>: 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:
- <u>SQL Server 2005 sites only</u>: Copy the PracticePartnerSQL93Convert_x64.dll file to C:\Program Files (x86)\Microsoft SQL Server\90\Tools Binn
- <u>SQL Server 2008 sites only</u>: 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.

Connect to Server	×
SQL Serve	Windows Server System
Server type:	Database Engine
Server name:	WIN-35KQ8RBB5P9\PP_SQL
Authentication:	Windows Authentication
User name:	WIN-35KQ8RBB5P9\Administrator
Password:	
	Remember password
Connect	Cancel Help Options >>

- 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

K Microsoft SQL Server Management Studio							
File	File Edit View Tools Window Community Help						
2	Connect Object Explorer		🚰 🔩 🛀	k 🗐 🧭 📴 🎼 🎽 🖀			
- - ,	Disconnect Object Explorer		→ ┦ X	Object Explorer Details			
	New •			🔁 🧟 🦨 🝸 🚟 🏢			
	Open 🕨	â	Project/Solu	tion Ctrl+Shift+O			
	Close	2	File	ctrl+o 1D			
Ē	Close Solution	₽ <mark>₽</mark> ₽	File with New	v Connection 5P9\PP_S			
	Save Selected Items Ctrl+S	₽ <mark>₽</mark>	₽¥ File Disconnected				
	Save Selected Items As			Name			
1	Save All Ctrl+Shift+S			Database Diagrams			
D	Page Setup	1					
8	Print Ctrl+P	s disa	bled)	Synonyms			
	Recent Files	1		Programmability			
	Exit			Storage			
	i Security						

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.

Ор	en File								? ×
	Look in:	CV94Files			•	- 过 🔍	X 📬 🎫 🗸	Tools -	
	Desktop	Name sql_93to94c	vt1.sql vt2.sql	Date mod	lified 🔽	Туре	▼ Size	•	•
	My Projects								
	y computer								
		File name:					•	Ор	en 🝷
		Files of type:	All Files	(*.*)			•	Car	ncel

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.

Find and Replace	×
🔒 Quick Find 👻 🐴 Quick F	eplace -
Find what:	
SQL940	
Re <u>p</u> lace with:	
LYTECMD	▼ ►
Look in:	
Current Document	
+ Find options	
	Eind Next Replace
	Replace <u>A</u> ll

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.

```
WIN-35KQ8RBB5P9\...\sql_93...* Object Explorer Details
   USE LYTECMD
   GO
   CREATE TABLE MROSOO(
       PTID INTEGER NULL ,
       OPID INTEGER NULL ,
       AUTHORIZ OPID INTEGER NULL ,
       CANCEL OPID INTEGER NULL ,
       ORDER_SEQ INTEGER NULL ,
       D ORDERED DATETIME NULL
       T ORDERED INTEGER NULL ,
       D AUTHORIZED DATETIME NULL
       T AUTHORIZED INTEGER NULL ,
       D_DENIED DATETIME NULL ,
       T DENIED INTEGER NULL ,
       D ENTERED DATETIME NULL ,
       T ENTERED INTEGER NULL ,
       D DRAWN DATETIME NULL
🚹 Messages
 (1 row(s) affected)
 (1 row(s) affected)
```

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 <u>https://support.practicepartner.com</u>.

 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.

👔 License		<u> </u>
🕞 🕞 - Comp	outer - Local Disk (P:) - License - 🚱 Search	
File Edit View Tools	Help	
🕘 Organize 👻 📗 Vie	ws 🔻	(?)
Favorite Links Documents Fictures Music More >>	Name Image Image Image Image Image Image Image Image Image Image	
Folders Desktop Administrator Public		

- 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.

Setup		×
Select Main Directory		
	Please enter path to Main Directory where database files will be stored.	
	Destination Folder	1
	P:\ppart\ Browse	
InstallShield	< Back Next > Cancel	

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.

Setup		×
Select Location of the License I	File	
	Please enter the path to the location of the license file.	
	Destination Folder P:\License	
InstallShield	< Back	Cancel

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.

Setup		×
Backup Verification		
	You have indicated that you have a backup of your system. Please VERIFY that your backup is intact. Verification usually involves restoring (or checking) the backup to make sure that all the files can be restored and that the backup is a complete copy of the most current files. Some of your data files will be converted during the upgrade. If the conversion fails or is interrupted it will be necessary to restore your files to their original state. A backup is required for this restoration. I have reviewed the warning above and I have a verified backup of my current Lytec MD data. I have not verified my backup.	
InstallShield	< <u>B</u> ack <u>N</u> ext > Cano	cel

- 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

Setup
Installing P:\ppart\MRDR01.dat
Cancel

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.

Setup	×
SQLSVR Instance Information	n
	Enter the connect string for your Practice Partner database instance, and the password you use for the Practice Partner SQLSVR user
	Instance LYTECMD
	Password PM\$IADM1N
InstallShield	< Back Next > Cancel

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 Crossreference 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.

Open File		? ×
Look in:	📔 CV94Files 💽 🌚 🗸 🖄 🖽 🛪 Tools 🔻	
Desktop Desktop My Projects My Computer	Name Date Type Size Tags Sql 93to94cvt1.sql Sql 93to94cvt2.sql	
	File name: Ope Files of type: All Files (*.*)	n v

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



6. 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.

- 7. Make a full backup of the database. Refer to the section <u>Backing Up and SQL Database</u> for more information.
- 8. 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.

Connect to Server	×
SQL Serve	Windows Server System
Server type:	Database Engine
Server name:	WIN-35KQ8RBB5P9\PP_SQL
Authentication:	Windows Authentication
User name:	WIN-35KQ8RBB5P9\Administrator
Password:	
	Remember password
Connect	Cancel Help Options >>

- 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.

K Microsoft SQL Server Management Studio	
File Edit View Tools Window Community	Help
🗄 🄔 New Query 🛅 📸 📸 📸 🗟 🐸 😒	🔩 🖬 🥔 🚯 🖬 🐎 🥵 🖕
Object Explorer 🗸 🕂 🕹	Object Explorer Details
Connect 🕶 📑 🛒 🝙	🔰 🛃 🥏 🕇 🎹 🏢
 WIN-35KQ8RBB5P9\PP_SQL (SQL Server 9.0.40) □ Databases □ Databases □ Database Snapshots □ Database Snapshots □ Database Snapshots □ Database Snapshots □ Security New Database New Query Script Database as ■ Notificatio ■ SQL Serve Reports Rename Delete Refresh Properties 	3 LYTECMD WIN-35KQ8RBB5P9\PP_SQL Wame Database Diagrams Tables Views Synonyms Programmability Service Broker Storage Security

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

🚺 Database Properties - LYTE	CMD		
Select a page	Script - 🖪 Help		
😭 General			
Files Filegroups Options	Collation: SQL_Latin1_Ge	eneral_CP1_CI_AS	┓
	Recovery model: Full		-
Permissions	Convertibility levels	15-7070	
🚰 Extended Properties	Compatibility level: [SQL Server 200	JD (90)	<u> </u>
Mirroring	Other options:		
Transaction Log Shipping	2 C		
	Auto Close	False	
	Auto Create Statistics	True	
	Auto Shrink	False	
	Auto Update Statistics	True	
	Auto Update Statistics Asynchronously	False	
	🗆 Cursor		
	Close Cursor on Commit Enabled	False	
	Default Cursor	GLOBAL	
	Miscellaneous		
	ANSI NULL Default	False	
Connector	ANSI NULLS Enabled	False	
Connection	ANSI Padding Enabled	False	
Server:	ANSI Warnings Enabled	False	
WIN-35KQ8RBB5P9\PP_SQL	Arithmetic Abort Enabled	False	
Connection:	Concatenate Null Yields Null	False	
WIN-35KQ8RBB5P9\Administrato	Cross-database Ownership Chaining Enable	ed False	
View connection properties	Date Correlation Optimization Enabled	False	
Mew connection properties	Numeric Round-Abort	False	
	Parameterization	Simple	-
Progress			
Ready	ANSI NULL Default		
		OK Cancel	

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 mrz199
- 3. Press <Enter>.

