

# Indigo

## Bp Premier MD3 Conversion Guide

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Intended for usage with Bp Premier version Indigo.

This User Manual is sourced from the Best Practice Software Bp Premier Indigo [Knowledge Base](#).

## Conversion Checklist

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Converting your data from one software package to another can be a daunting process. To facilitate a smooth transition to Bp Premier, the practice should prepare for both the Trial and Live conversions.

The Conversion Checklist below provides a summary of the steps involved when performing a trial and then live conversion. Read this checklist in conjunction with the detailed instructions for your clinical package to gain an overview of the conversion process.



**Important:** To mitigate issues, Best Practice Software insists that all sites perform a trial conversion **at least 2 weeks prior** to the expected Go Live date.

### How to get assistance

Best Practice Software provide a conversion utility free of charge to enable you to convert your data to Bp Premier. The conversion process would be performed by your own staff or your IT technician. General Products Support will provide as much assistance as possible via phone on 1300 401 111 or email [support@bpsoftware.net](mailto:support@bpsoftware.net).

The Best Practice Forum on our website [www.bpsoftware.net](http://www.bpsoftware.net) is an invaluable source of information, advice, views, ideas, questions and answers from hundreds of Bp Premier users across Australia. Click on **Register** in the menu at the top to join.

### Obtain a trial licence

Contact our relationship support team on 1300 401 111 for a quote to install Bp Premier. You can obtain a free trial licence to evaluate the software before purchase.

Go to [www.bpsoftware.net](http://www.bpsoftware.net) and select **Learning** to see the training options available for Bp Premier.

### Trial conversion

To run the trial and live conversion, you will need a spare computer referred to as the conversion machine. You cannot use your practice's current live database for a trial or live conversion.

1. Confirm your server PC and network meet the hardware, hard disk space and operating system requirements. See the [Best Practice Software knowledge base](#). Navigate to Bp Premier Indigo Edition > Install & Upgrade > Indigo System Requirements.
2. Contact Best Practice Software support to obtain the required conversion utility, matching Bp Premier version and free trial licence.
3. Ensure the pre-converted data in the original software database is in good condition.
4. Back up the original practice management software database.
5. Install the original practice management software on your conversion machine and restore the backup you just made to this installation.

6. Install the version of Bp Premier obtained from Best Practice Software on a conversion machine as a **Server** installation. This computer can be the same machine as in step 5.
7. Run the conversion utility on the conversion machine and follow the prompts.
8. Check data in the trial Bp Premier database thoroughly to ensure that all data converted correctly.



**Important:** Best Practice Software recommends that the principal doctors perform a thorough check of as many patient records as possible to ensure that all data is present and accessible. We suggest opening a range of patients in your current application (long term, medium term, and new patients) and comparing the data with this same patient in Bp Premier. We also recommend checking the last patient seen before the conversion to ensure that the most recent data has been converted.

9. Complete, sign, and fax or email the form *BP\_FAQ-Trial Conversion completion form* to General Products Support on +61 7 4153 2093. Email the file *BPSCConversion.log* to support@bpsoftware.net. This file can be found in the folder you installed the conversion utility in.
10. Best Practice Software Support will contact you with your 30 day activation licence key.

## Live conversion

Carry out the following steps if you have successfully performed a trial conversion with no issues, and have confirmed the most recent data has been converted.

1. Ensure you have your invoice and 30 day activation licence key. If you have not received your licence key after submitting your Trial Conversion completion form, contact Best Practice Software support.
2. Compare the drug database date in Bp Premier (**Help > About**) with the most recent drug database update from [www.bpsoftware.net](http://www.bpsoftware.net). If your installation does not have the most recent drug database, download and install an incremental or comprehensive update.
3. On conversion day, perform a complete backup of the old practice management system and database, including any components specific to that software package, such as MD3 ManageEzy documents.
4. Install the conversion utility on the conversion machine. Run the conversion utility.
5. Enter the 30 day activation key when prompted. This will convert your trial version of Bp Premier to a licensed version.
6. Install the [latest version](#) of Bp Premier as a **server** on your live server. This is the server that will be used during daily operation.
7. Install the [latest version](#) of Bp Premier as a **client** installation on all workstations.
8. Open Bp Premier on each workstation and connect to the Bp Premier server.

## Post-conversion check

1. Check ALL data carefully to ensure that conversion has been successful. Access the last patient updated in the old system prior to the conversion to ensure the visit record is present.



2. Set up practice details and ensure that the licence key is for the correct number of users. Ensure that only valid locations are displayed in practice details.
3. Review user permissions and reset user passwords. Ensure one trusted user has full permissions, and that the password for this user is secured in a fireproof safe for emergency access.
4. Back up the converted live data from your conversion machine.
5. Restore the converted data to your live Bp Premier server.
6. Disable all shortcuts to the old software to ensure staff can't accidentally use the wrong system.
7. Have each user log into their Bp Premier workstation and configure their printer settings and preferences.
8. Undertake training for staff new to Bp Premier.

## Converting from MD3

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Follow the instructions to convert data from Medical Director 3 practice management software. Read the checklist summary in Conversion Checklist on page 3 before following the instructions.

### 1. Read all documentation

To assist you in the conversion process, we have provided comprehensive documentation to guide you through the steps required such as installing the Bp Premier product, performing a trial conversion, checking the converted data, configuring your system and then going live with the software in your practice.

### 2. Check prerequisites

#### Obtain up-to-date version of Bp Premier

Please check with Best Practice support via phone on 1300 401 111 or email [support@bpsoftware.net](mailto:support@bpsoftware.net).

*Note: If an (old) previous installation of Bp Premier is present on the server, you should either upgrade to the latest version or uninstall completely and reinstall if the version is too old to upgrade.*

#### Obtain latest conversion utility

Please check with Best Practice support via phone on 1300 401 111 or email [support@bpsoftware.net](mailto:support@bpsoftware.net) prior to running the conversion to ensure that you have the most update to date MD3 Conversion utility to use.

#### Confirm Hardware Requirements

Ensure all machines that will be required to run Bp Premier meet the Bp Premier Indigo System Requirements. Review the [System Requirements](#) in the Indigo Knowledge Base for more information.

#### Confirm Hard Disk space

By default, Bp Premier program files and databases are installed to the C:\ drive. It is recommended that prior to GO LIVE that an estimate of the disk space requirements is made to ensure that there is sufficient space on the server on the C:\ drive to cater for:

- Size of the Bp Premier databases (following the import of your clinical data)
- Sufficient room for expansion of the databases due to normal operation.

If **compressed** backups are to be performed, there will need to be free space approximately twice the size of the Bp Premier databases to allow for temporary files to be created during the backup process (i.e. 6 GB of databases will need approximately 18GB free space to perform compressed backups)

To check the size of the databases following the data import, check the size of the databases stored in the folders. These are the default locations. You may have installed your data to another folder during installation:

- **SQL Express 2008 Installations** - C:\Program Files\Microsoft SQL Server-\MSSQL10.BPSINSTANCE\MSSQL\DATA
- **SQL Express 2008R2 Installations** - C:\Program Files\Microsoft SQL Server\MSSQL10\_50.BPSINSTANCE\MSSQL\DATA
- **SQL Express 2012 Installations** - C:\Program Files\Microsoft SQL Server-\MSSQL11.BPSINSTANCE\MSSQL\DATA
- **SQL Express 2014 Installations** - C:\Program Files\Microsoft SQL Server-\MSSQL12.BPSINSTANCE\MSSQL\DATA
- **SQL Express 2016 Installations** - C:\Program Files\Microsoft SQL Server-\MSSQL14.BPSINSTANCE\MSSQL\DATA

### 3. Will staff require training?

Consider whether any staff will require training. You will find details on the training that Best Practice offer on our web site [www.bpsoftware.net/learning](http://www.bpsoftware.net/learning).

### 4. Check data condition

Make sure your MD3 data is in the best possible condition 'BEFORE' converting to Bp Premier.

- Ensure any remote data has been uploaded 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.

### 5. Perform a Trial Conversion

A Trial conversion must be performed a minimum of two weeks prior to the date you wish to go live with Bp Premier. If you are unsure how to perform any of the processes, contact your IT technician for assistance.

#### Why a trial conversion?

- To ensure that the source data converts successfully and correctly
- To resolve any issues related to the conversion prior to the GO LIVE
- To allow you to understand the process and identify the time required to complete the conversion
- To ensure that Bp Premier meets your surgery's clinical and / or management requirements prior to purchase.



**Important:** When running the conversion on a virtual machine, the utility must be executed through a console connection, for example, TeamViewer, LogMeIn.

## Start trial conversion

1. Ensure that you have read all the documentation and have addressed all the Prerequisites listed at the beginning of this document.
2. Identify a secondary computer that can be used for the conversion machine:
  - Must meet Bp Premier Bp Premier Indigo System Requirements. Review the [System Requirements](#) in the Indigo Knowledge Base for more information.
  - Must also meet the hardware requirements recommended for MD3
  - Check that the hard drive (c:\ drive) on the conversion machine has free space equal to at least 2.5 times the size of the MD3 uncompressed backup. A Solid State Drive with high read and write speeds is recommended.
3. Ensure that the live version of MD3 is closed on all workstations and the server.
4. Backup your MD3 data as per the recommended method. Ensure that documents are included in the backup if they are stored outside of the database.
5. Install MD3 on the conversion machine as per the MD3 help files using the default options and instance name. The version must be the same as the one used on the live system.
6. Restore the MD3 backup taken above. Make a note of the name of the instance and the location of the documents folder (if stored outside of the database).
7. Install Bp Premier as a **Server** installation on your conversion machine.
  - A reboot may be required at the end of the installation
  - If using a **Terminal Server**, you must always install applications & updates via Add/Remove Programs
8. Check that the drug database date in Best Practice is up to date. Check this against the Best Practice Software website [www.bpssoftware.net/resources/bp-premier-downloads/](http://www.bpssoftware.net/resources/bp-premier-downloads/) and download and install any more recent data updates. See Updating the drug database for more information.



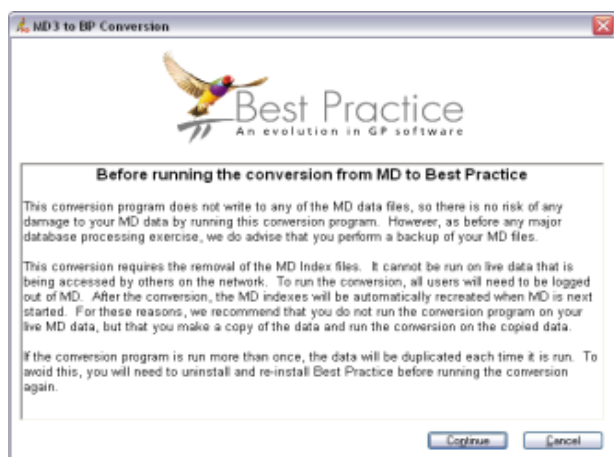
**Tip:** To check the drug (data) database version you are currently using, log into Bp Premier on the server and select **Help > About**.

9. Ensure that the machine does not have any scheduled tasks that could affect the performance of the machine or the network (i.e. scheduled backups, router reboots, server reboots, windows updates, etc).
10. Turn off any background processes such as results importing, backups, etc.
11. Install the MD3 conversion utility. This will put an Icon on the desktop.
12. Double click on the MD3 conversion icon to start the conversion.



## Conversion instructions

1. The **MD3 to BP Conversion** screen will appear, providing a brief overview on the conversion, please read the overview before continuing. Click **Continue** to proceed with the conversion.



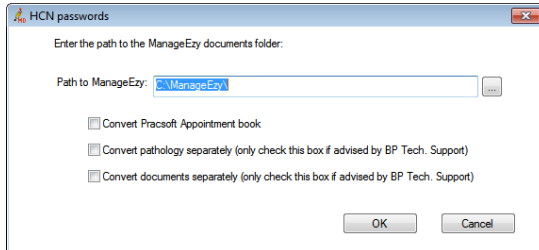
2. The **Start** screen will appear. Click **Start** to continue with the conversion.



3. The system will then prompt for the location of your ManageEzy data. Ensure that this setting is correct before proceeding. If the location is not correct, browse to the location of the ManageEzy data folder, highlight it, and click **OK**.



**Tip:** Large files can cause problems in the conversion process. Check the ManageEzy folder for any zip files over 50 MB and move them to a separate folder. Once the conversion completes the log will indicate which documents are missing. The missing documents can then be exported from MD3 and imported in to the relevant Bp Premier patient record.



4. **Convert your Pracsoft appointment book** – tick this if you are changing to Best Practice Management and want to transfer appointments from Pracsoft. Note: appointments cannot always convert accurately. Make sure you check the converted appointments very carefully during your trial conversion.
5. **Convert pathology separately** – tick this box ONLY if specifically advised by General Products Support to do so. You will then be advised of a utility to be run separately to convert pathology.
6. **Convert documents separately** – tick this box ONLY if specifically advised by General Products Support to do so. You will then be advised of a utility to be run separately to convert documents.
7. The **Checking MD3 databases** screen will appear and the system will look for the location of the MD3 data.

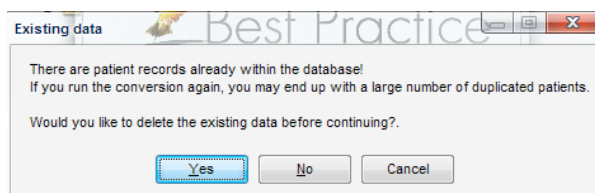
## Custom installations

8. If MD3 was **not** installed with the **default SQL Instance** name or **password**, the **HCN Instance** screen will appear.



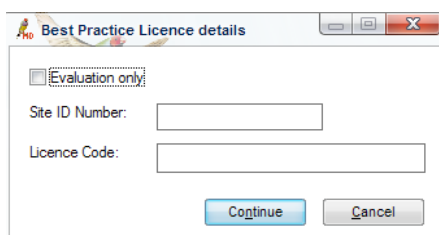
- Enter the Instance name – the format should be Servername\Instance name (i.e. SERVER\HCNNewSystem). If the instance was installed as a **Default instance** (i.e. Unnamed) leave the **Instance name** field blank. You will get another prompted asking you if you wish to use the default SQL Instance.
- Enter the **sa** password that was used when MD3 was installed. Click **OK**.

9. If you already have data in the Bp Premier database, the **Existing data** screen will appear.

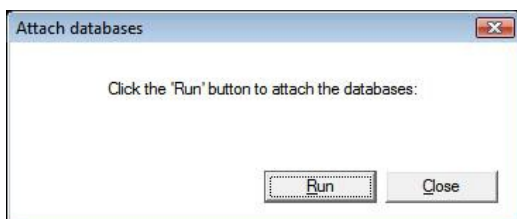


- To replace the existing data, click **Yes**.
- To keep the existing data and add new records to the Bp Premier database, click **No**.

10. You will then be prompted for your Best Practice Software licence details. Since you are running a TRIAL conversion, there is no need to enter a licence key, just tick the box **Evaluation only**.



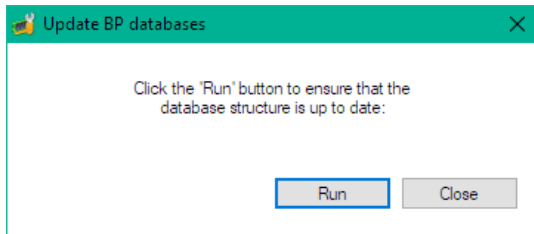
11. The conversion from MD3 to Best Practice will now take place. Depending upon the size of the data this may take some time. On average it will take approximately 1 1/4 hour per 5,000 patients however this is dependent upon the number of notes, results, and documents per patient. Overall times can range from 30 minutes to 6 days with an average being 24 hours.
12. When the conversion is complete browse to your Bp Premier installation folder, this is typically **C:\Program Files\Best Practice Software\BPS**.
13. Open the **Attach databases** utility. Click **Run**



The Attach database process can take from 1 – 15 minutes depending upon the number of document databases. When complete, a screen will appear showing all the databases that have been affected. Click **Ok** to close this screen.

14. With the installation folder still open locate the **Update databases** utility. Click **Run**

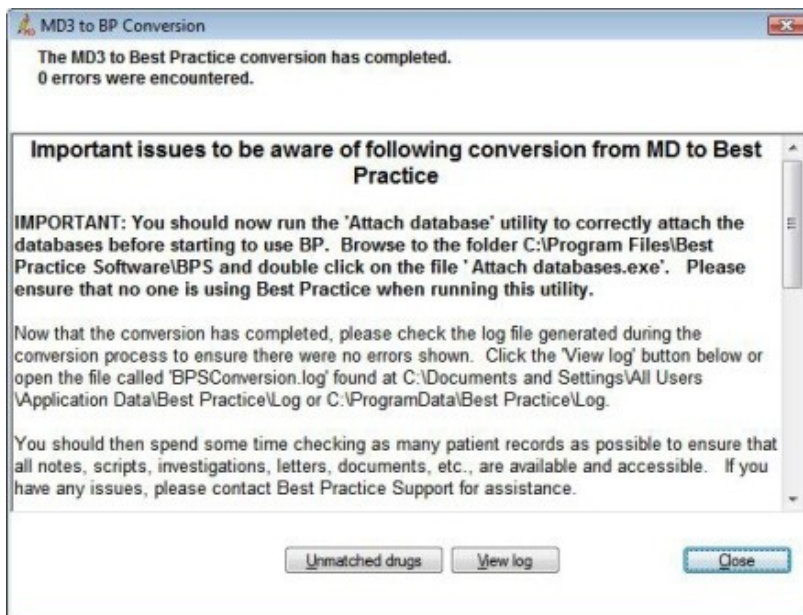




When the process has completed click **Close**.

## Complete trial conversion

A screen will appear to indicate that the conversion is complete and whether any errors were encountered. Check each log to confirm whether any errors occurred.



## Convert pathology or documents

If you were advised to 'Convert pathology separately':

- reboot the conversion machine to ensure the maximum memory is available
- run the separate utility as advised by General Products Support

If you were advised to 'Convert documents separately':

- reboot the conversion machine to ensure the maximum memory is available
- run the separate utility as advised by General Products Support



## Conversion order

Order that data is converted from MD3		
1. Doctors	Auto text	Health Assessments
2. Patients	Pathology Requests	Diabetes assessments
3. Heads of family	Pregnancies	Patient Education
4. Social history	Antenatal visits	Asthma plans
5. Reactions	Antenatal results	Graphics
6. Allergies	Clinical details	Holding file
7. Templates	cervical screens	Inbox
8. Letters	Measurements	ECGs
9. EPC Reports	INR values	Patient photos
10. Recipes	Recall protocols	Atomised Values
11. Current Rx	Reminders	Pathology Results
12. Default doses	Actions	Appointments & Sessions (if selected)
13. Progress notes	Categories	Documents
14. History	Address book	
15. Immunisations	Complex instructions	
16. Past prescriptions	Custom fields	

## 6. What to check

### Check conversion logs

After performing a Trial conversion, please check the log files generated during the conversion process. These will be found in the folder 'C:\Documents and Settings\All Users\Application Data\Best Practice\Log' or 'C:\ProgramData\Best Practice\Log' (depending on the windows version). There will be a number of files such as BPSConversion.log, UnmatchedCurrentRx, UnmatchedPrescriptions, etc.



**Important:** It is important to check these logs carefully to identify what could not be converted and ensure that there have been no errors recorded during the conversion that need to be addressed.



**Important:** Best Practice Software recommends that the principal doctors perform a thorough check of as many patient files as possible to ensure that data is present and accessible. Open a range of new to long term patients from your current software application and compare that the same data is available in Bp Premier. Also check that the last patient seen before the conversion has been transferred over correctly.



**Important:** Financial data is not converted. See [Convert to Bp Premier from other billing software](#)

## Check data

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

## Prepare Go Live plan

Now that your Bp Premier system contains your clinic data, prepare your GO LIVE plan.

The following instruction sets should be of assistance in understanding what needs to be updated in the system prior to using the system live:

- Setting up the Clinical module for the first time
- Setting up the Management module for the first time



**Tip:** Best Practice Software recommended that you identify any configuration options or preferences that are required to set up the system so that decisions can be made within the practice prior to GO LIVE. Any settings made in the Trial conversion data will be overwritten when you perform the Live conversion. Remember to make note of all the settings you decide upon so they can be quickly re-entered after the Live conversion.

## Submit logs and conversion form

When you are confident that all the data has been converted correctly:

1. **Email all the log files** generated from the latest trial conversion to support@bpsoftware.net and the Best Practice Software Support team member who is assisting you with your conversion.

Include your contact details and the practice name.

2. Once both of these have been received, we will issue your practice a Site ID and a **30 day key and invoice** to enable you to perform a LIVE conversion. This will be emailed to the email address for the main contact on the Trial Conversion completion form.

## Obtain licence key

Shortly after you submit the conversion log and completion form to Best Practice Software you will be issued with an invoice and 30 day licence key. If you have not received your licence key and are ready to start the Live conversion, please contact General Products Support to check on the progress of your application.

## 7. Start Live Conversion

Once the Trial Conversion process is completed and you have received the 30 day key and invoice, you can perform a LIVE conversion.

1. Update the conversion machine to the latest drug database update identified during the trial conversion. Check the Best Practice Software website [bp-premier-downloads](#) to see if there are any newer data updates that need to be applied.
2. Commence the Live conversion following the same trial conversion steps.
3. When prompted for the site ID and licence key, enter details as per the email you would have received from Best Practice Software after submitting the Trial conversion information.

## During conversion

1. Ensure the [latest release](#) of Bp Premier **server** version is installed on your live server. This is the Bp Premier server that will be used during daily operation.
2. Install the [latest release](#) of Bp Premier client (select **Client** when installing) on all workstations. Terminal server users can disregard workstation installation if the data is stored on the terminal server.
3. Open each client installation in turn. When prompted, select the Bp Premier server from the list of servers then close the application.

**Note:** *If the list of services box is not populated, check that no firewall hardware or software is blocking ports between server and workstations. See [Troubleshoot installation](#) for more information. A utility is available [here](#) to assist you in opening the required ports on your server machine.*

## When the conversion is complete

1. When the Live conversion is completed, **check ALL data carefully prior to going LIVE** to ensure that data has converted correctly.

1. Check the BPSConversion.log file again to ensure there are no errors indicated.
2. Perform another check of the data to ensure that all data is present and accessible. We suggest opening a range of patients in your current application ( long term, medium term and new patients) and comparing the data with this same patient in Best Practice. We also recommend checking the last patient seen before the conversion to ensure that the most recent data has been converted.
3. Ensure that only valid locations are displayed in **Setup > Practice details**.

Once you have confirmed that the conversion is complete and the data is correct:

1. If you have not already entered the licence key, do so now.
2. [Backup your live conversion data](#) from your conversion machine and restore to your live server.
3. Work through your Go Live plan to set up the various areas that you will be using.

## Set up Clinical module

If you are continuing to use a third party billing package you will need to configure the Link options with Best Practice.

## Set up Management module

1. Log into MD3 and remove any links that existed to your third party billing package to eliminate any conflicts with Best Practice.
2. Ensure that you have turned off any result importing and background process in MD3 so that documents are not imported in the old application rather than Bp Premier.
3. Follow the [Set up the Management module](#) instructions.

**Note:** *All doctors should be made aware of the patients listed in any unmatched lists as they will need to correct the patient record when that patient is first seen.*