



**Medtech32 Australia  
Version 9.2.1 Build 4494 Release**

**Installation Checklist**



**IMPORTANT NOTE**

**WARNING:** This checklist contains **MANDATORY** pre-requisites which **MUST BE COMPLIED WITH** prior to installing Medtech32 Version 9.2.1 Build 4494. 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.







---






## Table of Contents




For further information on this release, or any other queries regarding Medtech32 Version 9.2.1 Build 4494 Release, please contact the Medtech Helpdesk on 1800 148 165 → Option 1, or email [support@medtechglobal.com](mailto:support@medtechglobal.com).

<b>Table of Contents</b> .....	<b>2</b>
<b>Server Installation Checklist</b> .....	<b>3</b>
Server Pre-requisite Checklist .....	3
Server Installation Checklist .....	5
Client Pre-requisite Checklist.....	7
Client Installation Checklist.....	7
Client Post-requisite Checklist .....	7
<b>Briefcase Installation Checklist</b> .....	<b>8</b>
Briefcase Pre-requisite Checklist.....	8
Briefcase Installation Checklist .....	9
Briefcase Post-requisite Checklist .....	10

## Server Installation Checklist

Server Pre-requisite Checklist	Tick	Date / Time	Action By	Time Spent
 <p>Has the minimum version (and <b>VERSION 9.1.4 OR ABOVE</b>) build requirements are met?</p> <p>This can be checked by logging onto Medtech32 and selecting <i>Help ► About Medtech32</i>.</p>	<input type="checkbox"/>			
 <p><b>Have you READ THROUGH</b> the document "<i>MT32 Information for Release and Installation - V9.2.1 B4494?</i>"</p> <p>See: <a href="http://www.medtechglobal.com/au/support-au/mt32-downloads-au/">http://www.medtechglobal.com/au/support-au/mt32-downloads-au/</a></p> <p>This document contains valuable information that, if not read, could seriously affect the upgrade process and possible downtime of your network.</p>	<input type="checkbox"/>			
 <p>Have you logged in with Windows <b>ADMINISTRATIVE RIGHTS</b> ?</p>	<input type="checkbox"/>			
 <p>Have you <b>DISABLED</b> "User Account Control" (UAC) policy across <u>ALL</u> Server and Client computers that are running on <b>Windows Vista or Windows 7 or Windows 2008 or Windows 2008 R2?</b></p>	<input type="checkbox"/>			
 <p>To avoid unnecessary problems during installation, upgrade, or maintenance, preferably you must <b>ALWAYS</b> log onto Windows in "<b>Console Mode</b>" – 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>	<input type="checkbox"/>			
 <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 <b>INSTALL MODE</b>.</p>	<input type="checkbox"/>			

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 <b><u>Interbase Guardian and Server</u></b> have been <b><u>STOPPED</u></b> in order to avoid corruptions. Once the backup has been completed, Interbase Guardian and Server can be restarted.</p>	<input type="checkbox"/>			
 <p>Have completed a <b><u>SUCCESSFUL</u></b> Database Maintenance (i.e. Interbase Backup and Restore) on <u>ALL</u> databases?</p> <p>By default this must include both <b><u>MT32.IB</u></b> and <b><u>BLOB.IB</u></b>, <b>PLUS</b> ALL other databases you would like to upgrade (e.g. <b><u>Training.IB</u></b> and <b><u>TrainBLOB.IB</u></b> databases if you would like to keep them for training/testing, and ALL additional pair of databases for each additional site/department).</p> <p>The amount of free hard disk space required to perform the backup and maintenance on the Interbase Server should be at least <b>THREE</b> times the size of ALL databases you will be working with.</p> <p>For detailed instructions, please refer to the following document on the Medtech32 V9.2.0 B4361 DVD: <b><u>"Interbase\Interbase XE Documentation\Interbase XE - Backup &amp; Restore Instructions.pdf"</u></b></p>	<input type="checkbox"/>			
 <p>Have <b>ALL Users</b> <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>	<input type="checkbox"/>			
 <p>Have you stopped <b>ALL Services</b> 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>	<input type="checkbox"/>			
 <p>Have <b>ALL Applications</b> that require access to the databases have been <u>STOPPED</u> –</p>	<input type="checkbox"/>			

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.				
 Have <b>ALL Scheduled Tasks</b> that require access to the databases have been <b>STOPPED</b> –  e.g. Message Transfer Utility, Auto Scan from Folder, NPS RADAR Update/Submit, etc.	<input type="checkbox"/>			
 Have <b>ALL Routine Backup and Maintenance Tasks</b> that require access to the databases have been <b>STOPPED</b>  e.g. Daily Database File Backup, Daily Interbase Database Sweep, Monthly Interbase Backup and Restore, etc.	<input type="checkbox"/>			
 <b>ALL</b> Briefcase Laptops with <b>OUTSTANDING</b> Briefcased data has been <b>CHECKED-IN</b> prior to running the update on the Server.	<input type="checkbox"/>			

<b>Server Installation Checklist</b>	<b>Tick</b>	<b>Date /Time</b>	<b>Action By</b>	<b>Time Spent</b>
<p>1. Install Medtech32 <b>VERSION 9.2.1 Build 4494</b> Update on the Server by following step by step instructions in the document "<u><i>MT32 Release Notes – Technical - V9.2.1 B4494</i></u>", which can be downloaded from the Medtech Support web site: <a href="http://www.medtechglobal.com/au/support-au/mt32-downloads-au/">http://www.medtechglobal.com/au/support-au/mt32-downloads-au/</a></p> <p>There are 2 versions of the installer:</p> <p>a) Standard Version: <i>Medtech32-Version-9.2.1-4494-Patch-Update-Standard-consolidated.exe</i></p> <p>b) Debug Version: <i>Medtech32-Version-9.2.1-4494-Patch-Update-ME_ENABLED-consolidated.exe</i></p> <p>Please <b>DO NOT INSTALL</b> the Debug Version unless instructed by the Medtech Helpdesk.</p>	<input type="checkbox"/>			

Server Installation Checklist	Tick	Date /Time	Action By	Time Spent
1. 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 <b><u>EXECUTE MODE</u></b> .	<input type="checkbox"/>			
2. Restart <b>ALL Services</b> that have been <b><u>STOPPED</u></b> 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.	<input type="checkbox"/>			
3. Restart <b>ALL Applications</b> that have been <b><u>STOPPED</u></b> 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.	<input type="checkbox"/>			
4. Resume <b>ALL Scheduled Tasks</b> that have been <b><u>STOPPED</u></b> prior to the installation – e.g. Message Transfer Utility, Auto Scan from Folder, NPS RADAR Update/Submit, etc.	<input type="checkbox"/>			
5. Resume <b>ALL Routine Backup and Maintenance Tasks</b> that have been <b><u>STOPPED</u></b> prior to the installation – e.g. Daily Database File Backup, Daily Interbase Database Sweep, Monthly Interbase Backup and Restore, etc.	<input type="checkbox"/>			
6. Ensure you can <b><u>SUCCESSFULLY</u></b> logon to the Medtech32 application from the Medtech32 Server <b><u>WITHOUT ANY ERRORS</u></b> .  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.	<input type="checkbox"/>			
7. <b>SCANNING Module Check (SERVER)</b>  For ALL PRACTICES that use the Scanning Module, it is critical that you read the full details from the <b><i>Medtech32 Technical Release Notes</i></b> – and follow the instructions detailed in the Scanning Section.  Tick this off the Checklist once completed.	<input type="checkbox"/>			

## Client Pre- and Post-Installation Checklist

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

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 <b>WITHOUT ANY ERRORS</b> . Including standard client workstations (i.e. fat clients), and connections via Remote Desktop or Citrix sessions (i.e. thin clients).	<input type="checkbox"/>			
<b>2. SCANNING Module Check (CLIENTS)</b>  For ALL PRACTICES that use the Scanning Module, it is critical that you read the full details from the <b>Medtech32 Technical Release Notes</b> – and follow the instructions detailed in the Scanning Section.  Tick this off the Checklist once completed.	<input type="checkbox"/>  <input type="checkbox"/>			

## 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 if already on Medtech32 V9.2.0 B4361 or Version 9.2.1 B4443 or Version 9.2.1 B4450.	–	–	–

## 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 <b>MUST</b> be on Medtech32 <b><u>VERSION 9.2.0 OR ABOVE</u></b> to install this Update. If you <b><u>ARE NOT</u></b> currently on this version or higher, please <b><u>DO NOT</u></b> continue.</p> <p>This can be checked by logging onto Medtech32 and selecting <i>Help ► About Medtech32</i>.</p>	<input type="checkbox"/>			
<p>2. Ensure the person(s) who will be performing the installation have <b><u>READ THROUGH</u></b> the document "<i>MT32 Release Notes – Technical Installation - V9.2.1 B4494</i>", which can be downloaded from the Medtech Support web site: <a href="http://www.medtechglobal.com/au/support-au/mt32-downloads-au/">http://www.medtechglobal.com/au/support-au/mt32-downloads-au/</a></p> <p>This document contains valuable information that, if not read, could seriously affect the upgrade process and possible downtime of your network.</p>	<input type="checkbox"/>			
<p>3. Ensure you are <b><u>ALWAYS</u></b> logged onto Windows with <b><u>ADMINISTRATIVE RIGHTS</u></b> when performing <b><u>ANY</u></b> installation, update or maintenance tasks.</p>	<input type="checkbox"/>			
<p>4. "<b><u>User Account Control</u></b>" (UAC) <b>MUST</b> be <b><u>DISABLED</u></b> as a policy across <b><u>ALL</u></b> Briefcase Laptops that are running on <b><u>Windows Vista or Windows 7 or Windows 2008 or Windows 2008 R2</u></b>.</p>	<input type="checkbox"/>			
<p>5. To avoid unnecessary problems during installation, upgrade, or maintenance, preferably you should <b><u>ALWAYS</u></b> log onto Windows in "<b><u>Console Mode</u></b>" – 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>	<input type="checkbox"/>			
<p>6. Ensure you have <b><u>LOGGED OUT</u></b> of Medtech32 on <b><u>ALL</u></b> Briefcase Laptops.</p>	<input type="checkbox"/>			



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

Briefcase Installation Checklist	Tick	Date /Time	Action By	Time Spent
1. Install Medtech32 <b>VERSION 9.2.1 Build 4494</b> Update on <u>EACH</u> Briefcase Laptop by following step by step in the document " <u>MT32 Release Notes – Technical - V9.2.1 B4494</u> ", which can be downloaded from the Medtech Support web site: <a href="http://www.medtechglobal.com/au/support-au/mt32-downloads-au/">http://www.medtechglobal.com/au/support-au/mt32-downloads-au/</a>  There are 2 versions of the installer: a) Standard Version: <i>Medtech32-Version-9.2.1-4494-Patch-Update-Standard-consolidated.exe</i> b) Debug Version: <i>Medtech32-Version-9.2.1-4494-Patch-Update-ME_ENABLED-consolidated.exe</i> Please <b>DO NOT INSTALL</b> the Debug Version unless instructed by the Medtech Helpdesk.	<input type="checkbox"/>			

Briefcase Post-requisite Checklist	Tick	Date /Time	Action By	Time Spent
1. Reconnect the Briefcase Laptops to the Network.	<input type="checkbox"/>			
2. Revert back to the <b>ORIGINAL COPY</b> of <i>MT32.ini</i> configuration file on <u>EACH</u> Briefcase Laptop.	<input type="checkbox"/>			
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 <b>COMPLETE CHECK-OUT</b> on <u>EACH</u> Briefcase Laptop.  All Briefcase Laptops <u>MUST ALWAYS</u> be on the <b><u>SAME Medtech32 Version and Build</u></b> and <b><u>SAME Interbase Version</u></b> as the Main Medtech32 Server. Otherwise data corruptions, and thus data loss, might occur during check-outs.	<input type="checkbox"/>			
4. Ensure you can <u>SUCCESSFULLY</u> logon to the Medtech32 application from <u>EACH</u> Briefcase Laptop <b>WITHOUT ANY ERRORS</b> . 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.  It is also recommended to briefly test the key features within Medtech32 in the LOCAL Briefcased Database 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.	<input type="checkbox"/>			
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: <b>"Customer Name [Briefcasing]"</b> .  If the <u>Main Application Title</u> does not display <b>[Briefcasing]</b> after the Customer Name, it means the Briefcase Check-out has failed and you should contact the Medtech Helpdesk for assistance.	<input type="checkbox"/>			