



Upgrade Process Checklist


The following checklist contains a few items to take into consideration before performing the update to the current release:

- 1** [Review system requirements.](#)

- 2** **Optional:** If you currently have an IT technician who performs your updates, please contact them before proceeding.

- 3** Allow enough time to perform the update, we recommend preferably outside of business hours or weekends.

- 4** Perform a full [MedicalDirector Backup.](#)

- 5** **Optional:** If you are a mobility user, please upload all data prior to update.
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- 6** Make sure that all MedicalDirector Software is closed on each machine.

- 7** Ensure Antivirus and Firewall software has been disabled for the installation and re-enabled once the install is complete.

- 8** A Database Health Check runs as part of the installation.
Important: This utility will assess the database condition to minimise issues when upgrading to 3.16. If you are presented with a warning please contact Customer Care for further advice.

- 9** Once installed successfully on the server, you can install the update on your workstations.

- 10** Open **MedicalDirector Clinical** and ensure you can view and save letters and documents. Open **MedicalDirector PracSoft** and ensure you can perform an OPV check as well as check that your Daysheets reflect the last working day's billing.