NextGen® Dashboard Client Upgrade
White Paper

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Overview

The NextGen® Dashboard Client Upgrade White Paper provides instructions to NextGen Healthcare clients on how to upgrade NextGen® Dashboard from Version 3.1 to 3.2.

Note: For upgrades from any other versions, you need to create a ticket with NextGen Healthcare Information Systems.

Prerequisites

The following are the requirements for upgrading NextGen Dashboard from Version 3.1 to 3.2:

- NextGen Dashboard 3.1 installed
- SQL Server 2008, 2008R2 or 2012
- Production and Report databases set to compatibility level 2008 or higher
- Separate Production and Report SQL Server databases for Production installations
- SQL login to Production and Report databases with privileges to create and update SQL users, logins, SQL job, and so on
- SQL Server Agent must be running on the Report Server
- Browsers such as Microsoft® Internet Explorer® 8 or higher, latest version of Mozilla® Firefox®, Opera, Safari®, or Google Chrome™ to view dashboards
- Fast Internet access
- NextGen® Database 5.6 UD1 SP2 (5.6.9.12) or higher
- .Net Framework 3.5 SP1 on machines where the NextGen Dashboard Application Launcher runs

Upgrade NextGen Dashboard from 3.1 to 3.2

You can use the Upgrade Dashboard feature available in the NextGen Dashboard portal to upgrade NextGen Dashboard Version 3.1 to 3.2.

Tip: It is recommended to execute NextGen Dashboard upgrade after business hours to avoid any dashboard related issues.

To upgrade dashboard:

1. Log on to www.nextgendash.com as Client Admin role from any machine.
2. From the Home page, click the Upgrade Dashboard link.
The Dashboard Upgrade page displays.

3. Select 3.2 dashboard version from the Select from available Dashboard upgrades list.

4. Provide authentication for Production and Report SQL with sa account or account with privileges to create and update SQL users, jobs, tables, SPs and to manage permissions.

   **Note**: Authentication for both Production and Report SQL servers is required.

5. Enter SQL user and SQL password details for Production and SQL connections.

6. Click the UPGRADE DASHBOARD button.

   Once the upgrade is completed, a successful upgrade message displays.

   **Note**: Upgrade can take several minutes, depending on internet connection speed and SQL performance. Do not leave or refresh the page until you are prompted with successful upgrade message.

   After upgrading you need to:
   - Log out of NextGen Dashboard portal and re-login. To verify the successful completion of upgrade process, you can log on to NextGen Dashboard portal, click the Help menu > About. It has to be NextGen Dashboard Version 3.2.x.xx.
   - Wait for a backup of Production database and restore of it to Report database.
   - Wait for scheduled dashboard SQL job execution (normally early morning). After successful execution of the SQL job, dashboard is updated with stored procedures and other SQL objects.

   **Note**: The Application Launcher login is not upgraded by this process. It shows the previous NextGen Dashboard version but it does not affect any dashboard functionality.
Upgrade Application Launcher Components

Follow the steps only if you wish to update NextGen Dashboard Application Launcher version. This is optional and there is no functional difference between NextGen Dashboard Application Launcher 3.1 and 3.2. This process upgrades the NextGen Root components and Production database.

**Note:** It is recommended to run NextGen Dashboard upgrade after business hours.

To upgrade NextGen Dashboard Application Launcher from 3.1 to 3.2:

1. Download the **NGDashboardTools3.2.0.20.exe** file to machine where you have access to Production SQL server and NextGen Root shared folder.
2. Double-click and run the .exe file.
   - Accept the default folder (the driver location can be changed from C:\ to other location if desired).
   - If you get the Overwrite Protection dialog box, click **Yes to All** to overwrite all existing files and extract the files from the package.
   - After the extraction completes the NextGen Update Utility dialog box displays.

3. In the **Apply Updates** section:
   - Click **Read Local NGConfig.ini**.
     
     **Note:** The installation path must point to NextGen Root and the Data Source Name must point to Production SQL.
     
   - Enter **fusion** as password and click **Apply**.
Once the update is complete, click **Exit**.

**Note:** You must run `C:\nextgen\vcp.exe` on the fat client machines/terminal servers to get the latest files to each client.

This upgrades NextGen Dashboard application in the database to the latest dashboard objects. The process would take several minutes to complete.

- Wait for a backup of Production database and restore of it to Report database.
- Wait for scheduled dashboard SQL job execution (normally early morning). After successful execution of the SQL job, dashboard is updated with stored procedures and other SQL objects.

After the upgrade is complete, new charts and features are available to you.
## Document Revision History

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