

Care Systems Version 9 Upgrade Installation Guide

Steps to upgrading an existing Care Systems 9 installation



Computer Software Specifically Designed for
Aged Care Management

Disclaimer

This document is meant as a guide only and should not be taken as a definitive instruction. It is the user's sole responsibility to ensure that the operational procedures adopted for Care Systems software are appropriate for their facility and achieve the desired result.

Care Systems' Support Services may be used to supplement and clarify the information in this document. Care Systems' normal support charges will apply.

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Choosing Which Installation to Download

Determining your current version.



To determine the current Version of your software, log on to a Care Systems application, and choose menu selection Help – About.

Clients running Version 9.03.04 or above

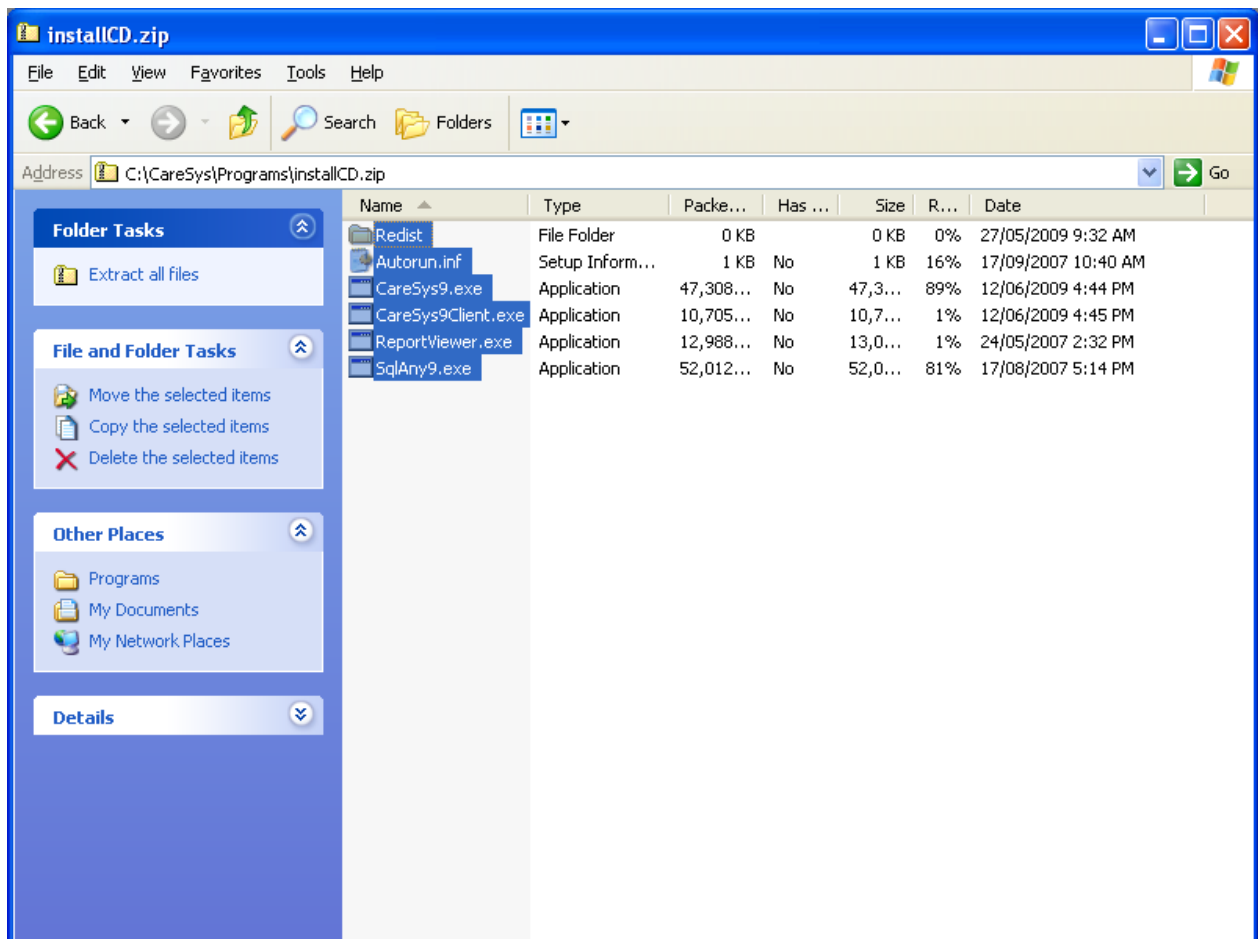
If you are running Version 9.03.04 of the Care Systems suite or above, you may download just the caresys9.exe file from the website. This file can be found at <http://www.caresystems.com.au/downloads/v9.05.00/caresys9.exe>. To install Version 9.05.00 please follow the instructions found later in this document in the section labeled [Care Systems Installer on Server](#). If you have previously successfully installed the Care System 9 client, there is no need to re-run the caresys9client.exe file.

Clients running 9.03.03 or earlier versions

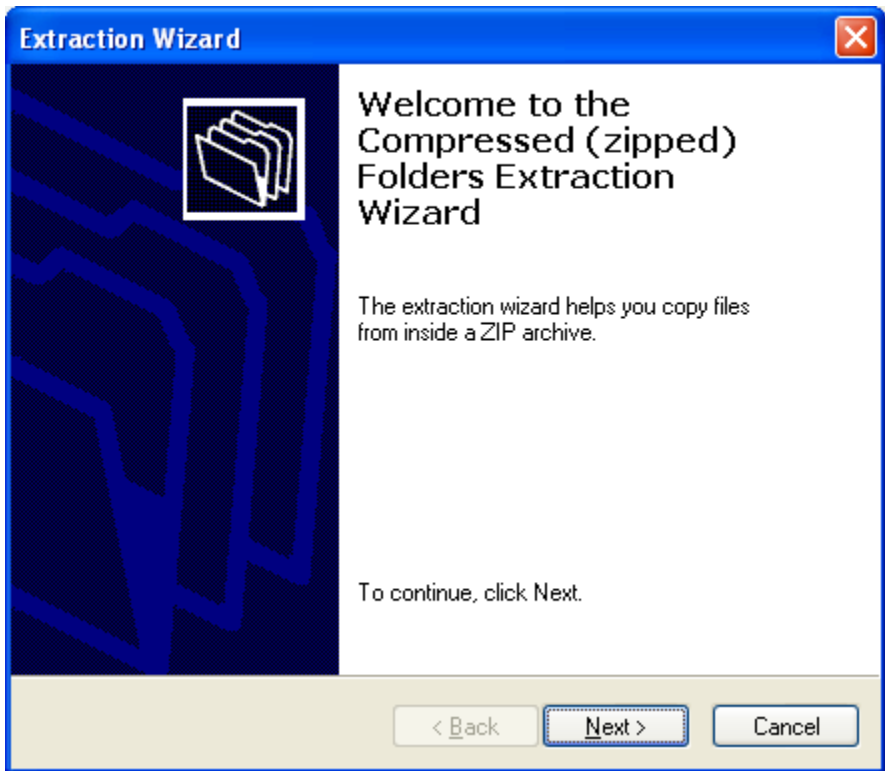
If you are running an earlier version of the software, you must download the full installation file, as some additional prerequisite files are required to upgrade to Version 9.05. The full installation can be found at <http://www.caresystems.com.au/downloads/V9.05.00/installcd.zip>.

The following instruction assume you do not have a Zip utility installed, and will rather use the Windows Compressed Folders application. If you have a compression utility, please refer to your support documentation to determine how to extract this file.

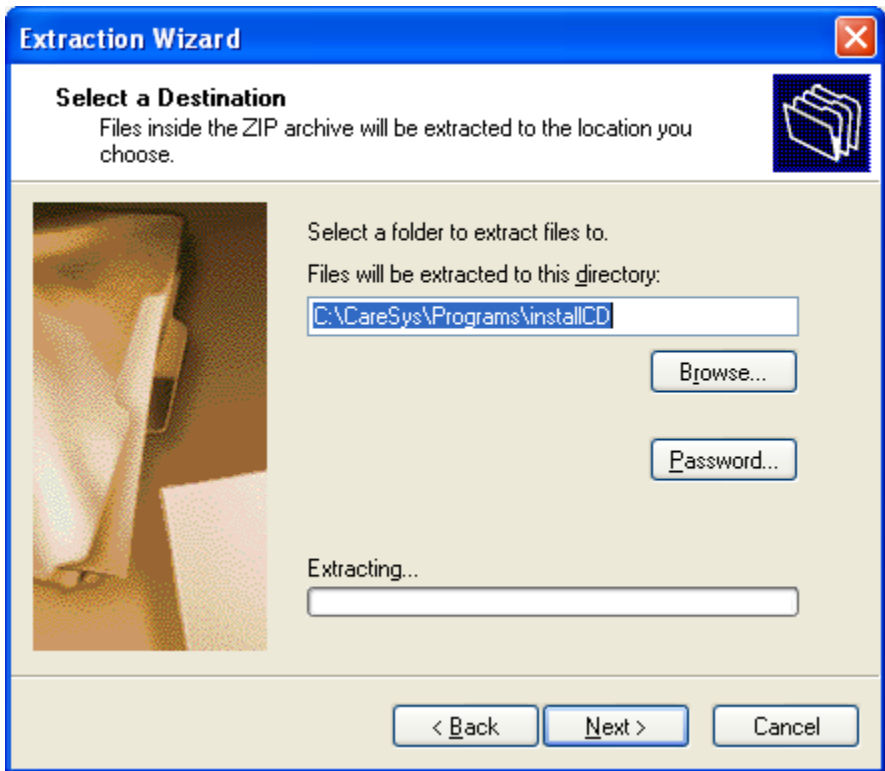
Download this file to your caresys\programs folder on the server, and double click on it.



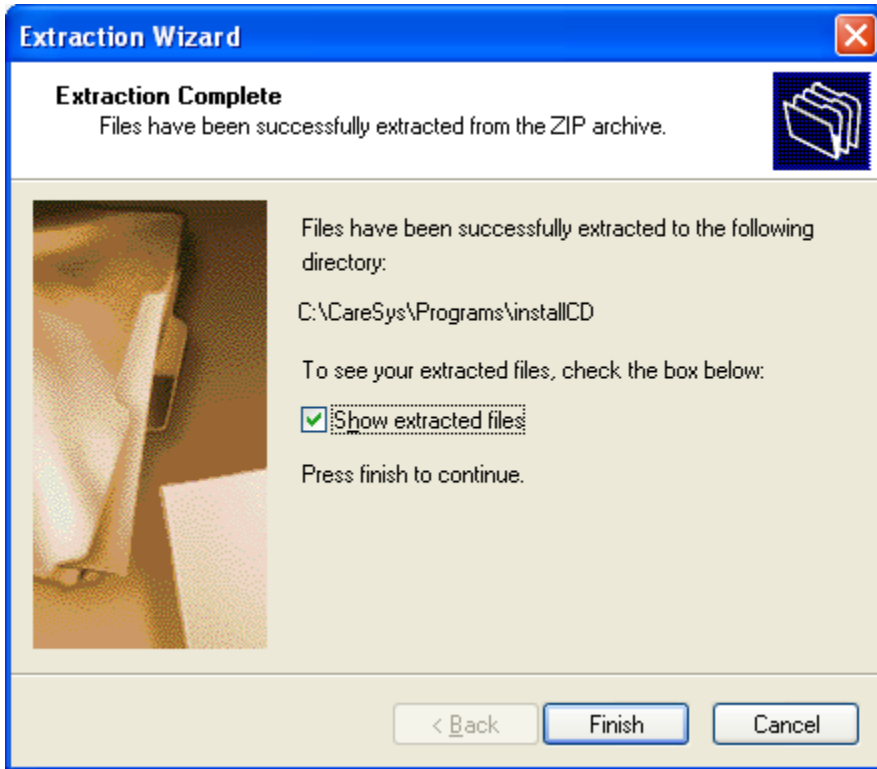
Select all files in the folder, and click Extract all files.



Click Next to continue the extraction.



Modify the extracted directory if necessary (recommended for advanced users only), and click next to extract the files to this folder.



Click Finish, and double click the [Caresys9.exe](#) or [Caresys9client.exe](#) to install the relevant files as per instructions in the sections below

Preparing to Upgrade

Introduction

Before you upgrade your existing Care Systems 9 programs and database, it is strongly advised that a backup of your database & programs is taken.

Database backups can be run using DBCare

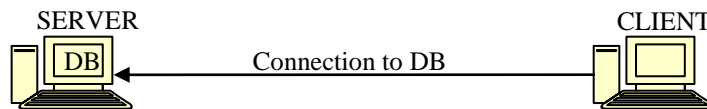
Backups of program files can be made by simply copying the contents of the programs folder to a backup location.

Instructions for backing up your database/s and program files follow.

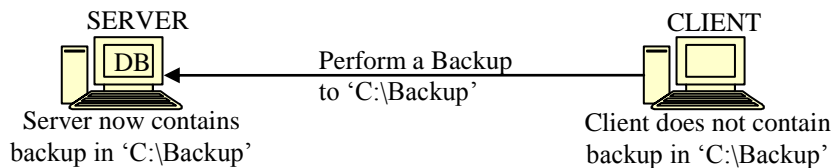
Database Backup (from the DBCare user guide)

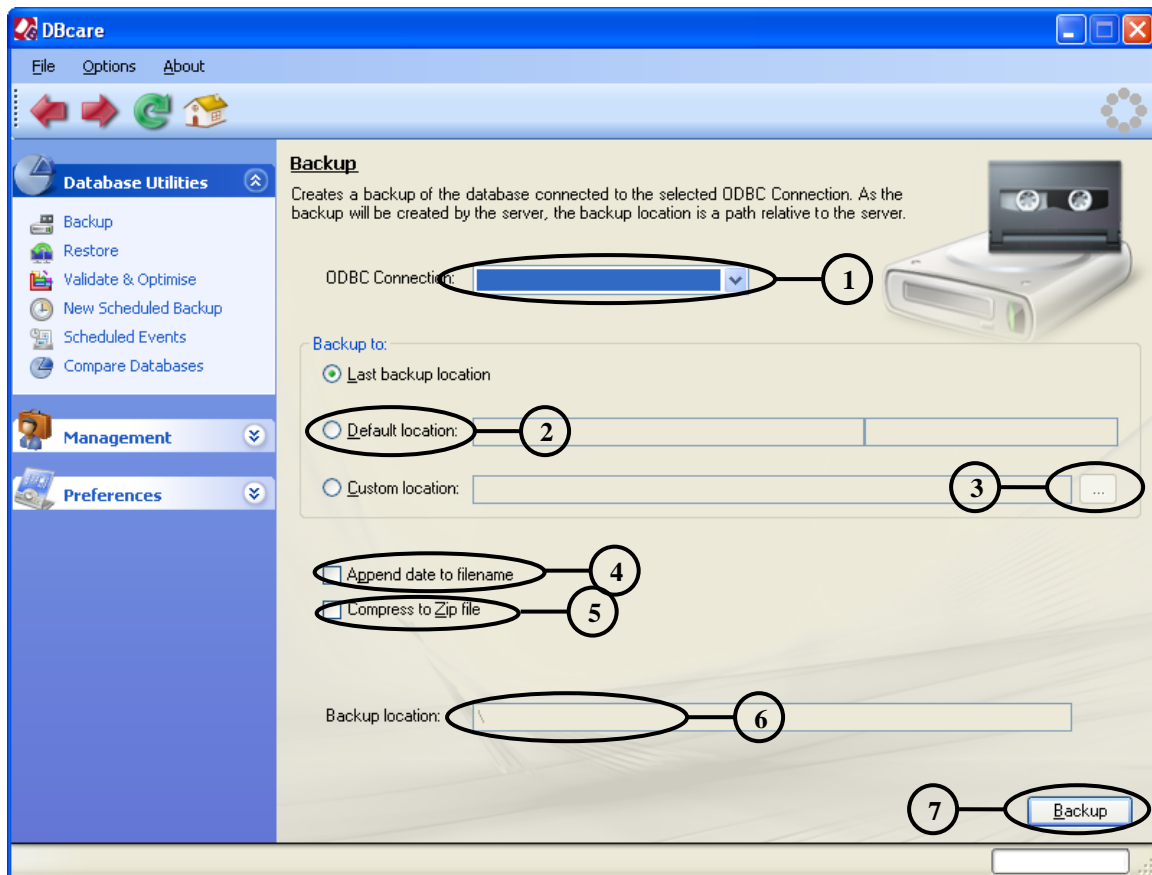
Creates a backup of the database connected to the selected ODBC connection.

It is important to remember the backup will be saved on the computer hosting the database server. This means the backup will be saved to a path relative to the computer hosting the database server.



If a Backup is run from Client and the saved to the location 'C:\Backup' then the backup will be located on the Server's hard drive at 'C:\Backup'.





1. [ODBC Connection:](#) Used to select the SQL Anywhere 9 database you wish to backup.
2. **Default Location:** The second text box is used to specify the name to give the backup. The default location can be changed in [General Configuration](#).
3. **Browse:** Used to browse the folder hierarchy on the server computer to choose a backup location.
4. **Append Date:** Appends the current date to the end of the chosen name.
5. **Compress to Zip:** Saves the backup as a [Zip File](#).
6. **Backup Location:** The absolute path on the server where the backup will be saved.
7. **Backup:** Start creating the backup.

An Example of the Backup Process

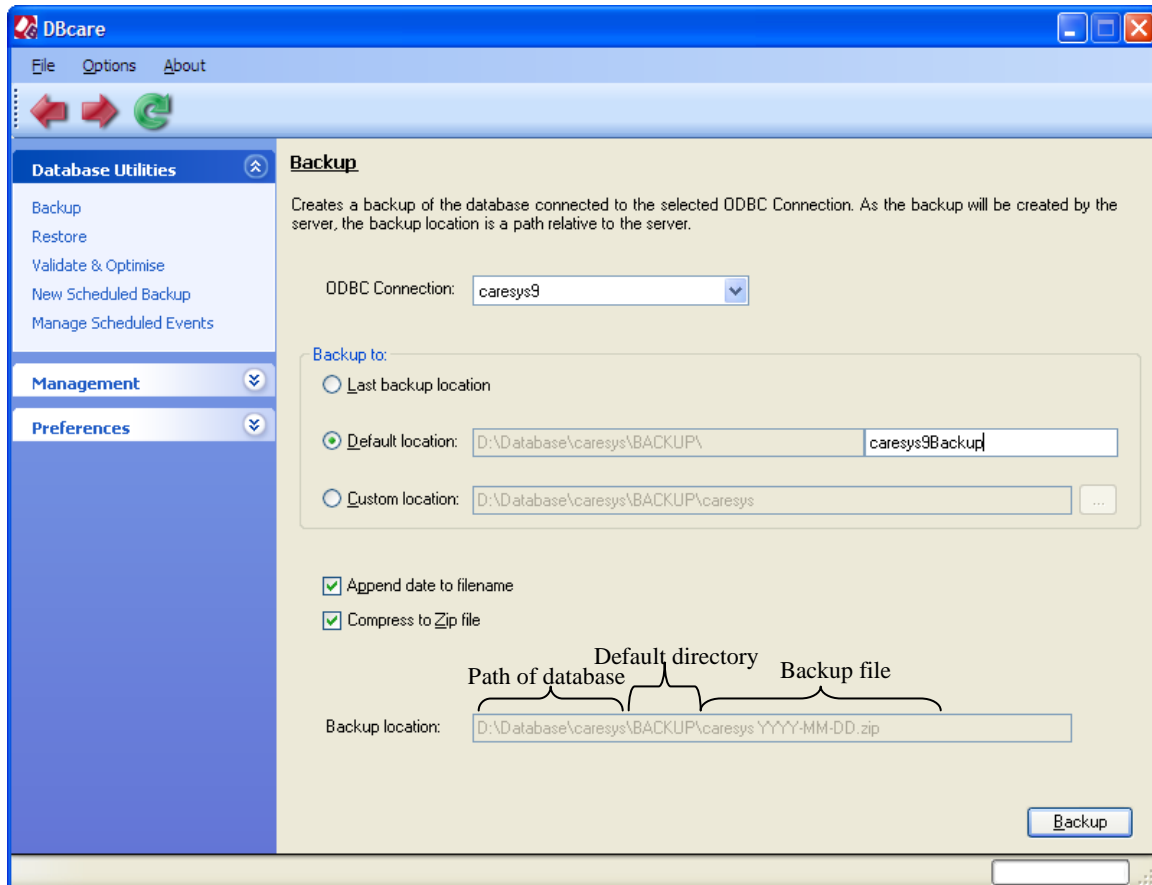
A backup of 'caresys9' is to be taken, so this is selected from the ODBC connection list.

The backup name will be 'caresys9Backup', the "Default location" radio button is clicked and 'caresys9Backup' is entered.

"Append date" is selected so the backup date is easily identified.

"Compress to zip file" is selected to save disk space.

"Backup location" shows the name of the file and where it will be saved. The form now looks like this:

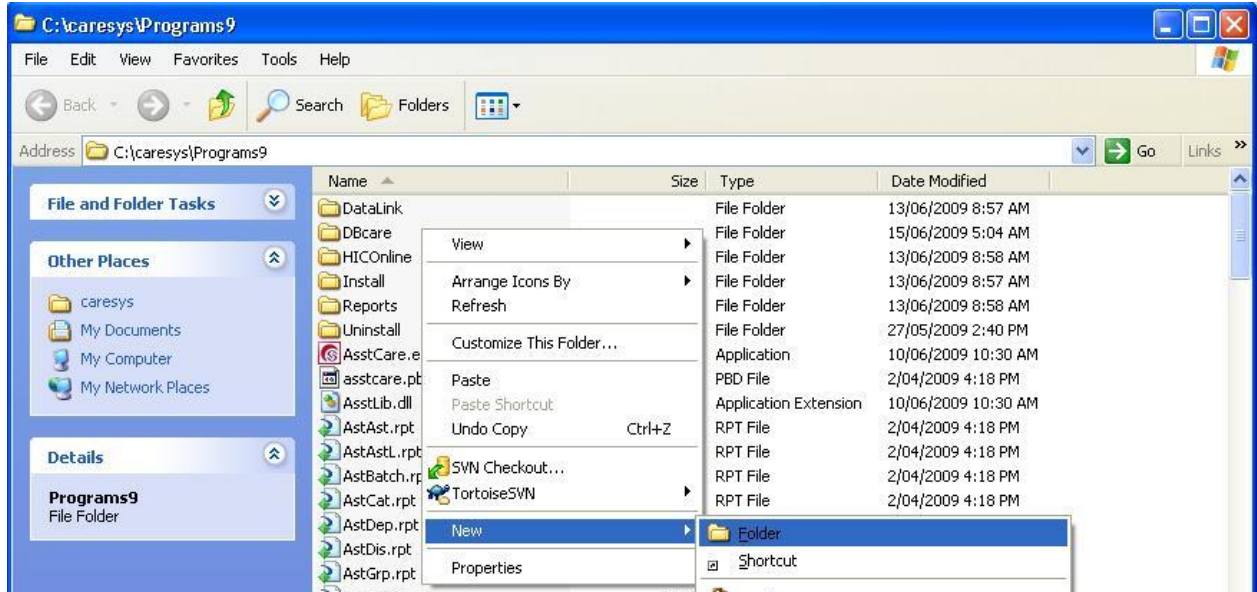


When the backup is run, YYYY-MM-DD will be replaced by the current date.

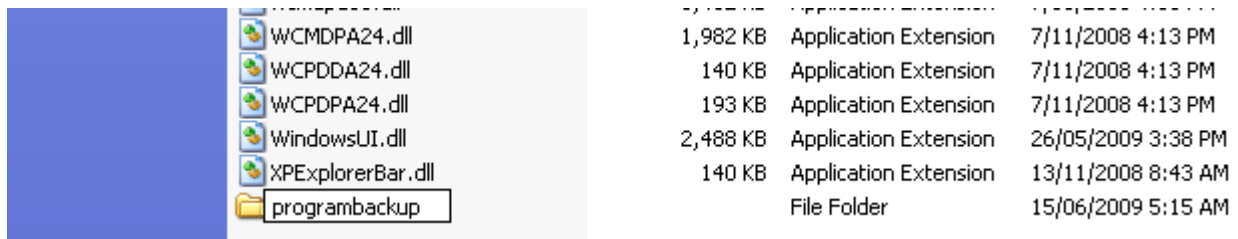
Program Files backup

In Windows Explorer, select the folder where the Care Systems 9 programs are located.

Right click and select New> Folder

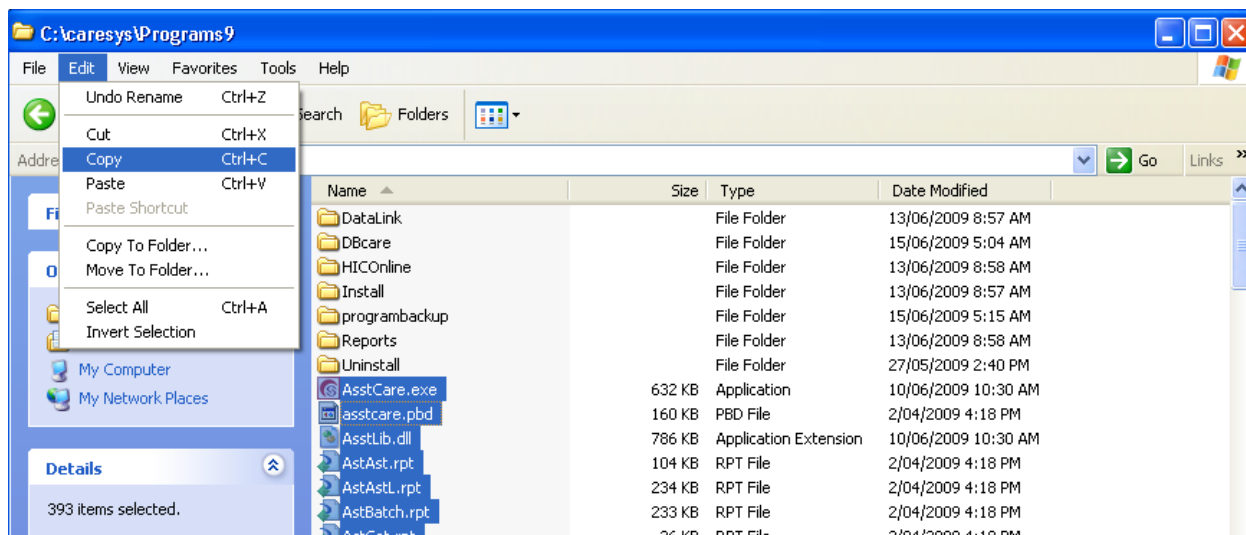


Create a folder called “programbackup” or similar

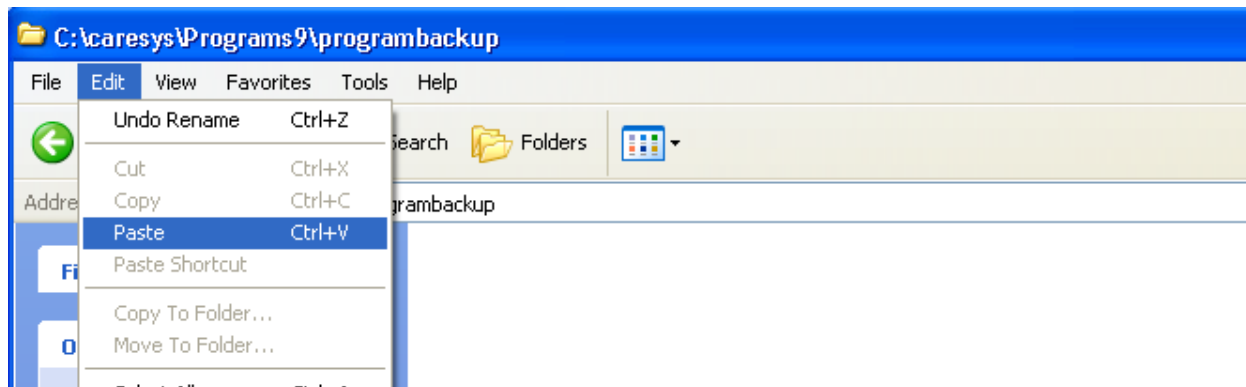


Select all files in the folder (you do not need to include any sub-folders in your selection). Approximately 400 files should be selected.

Select Edit> Copy



Open the “programbackup” and select Edit> Paste

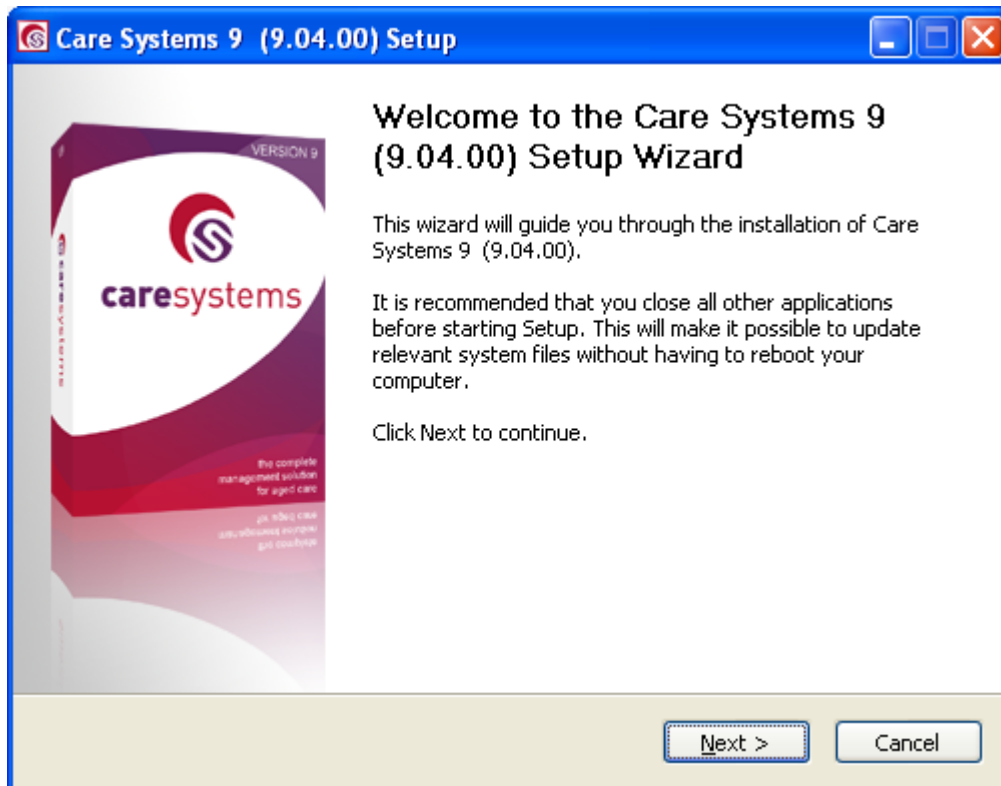


Care Systems Installations

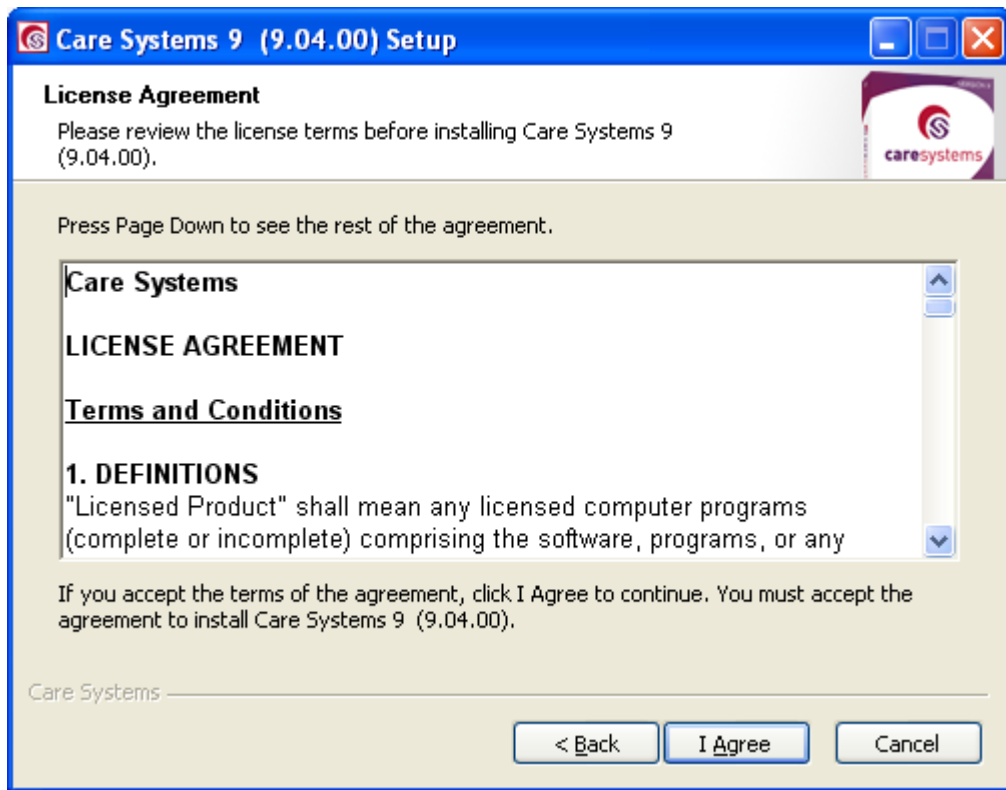
Care Systems Installer (on Server)

Run from the installation CD:

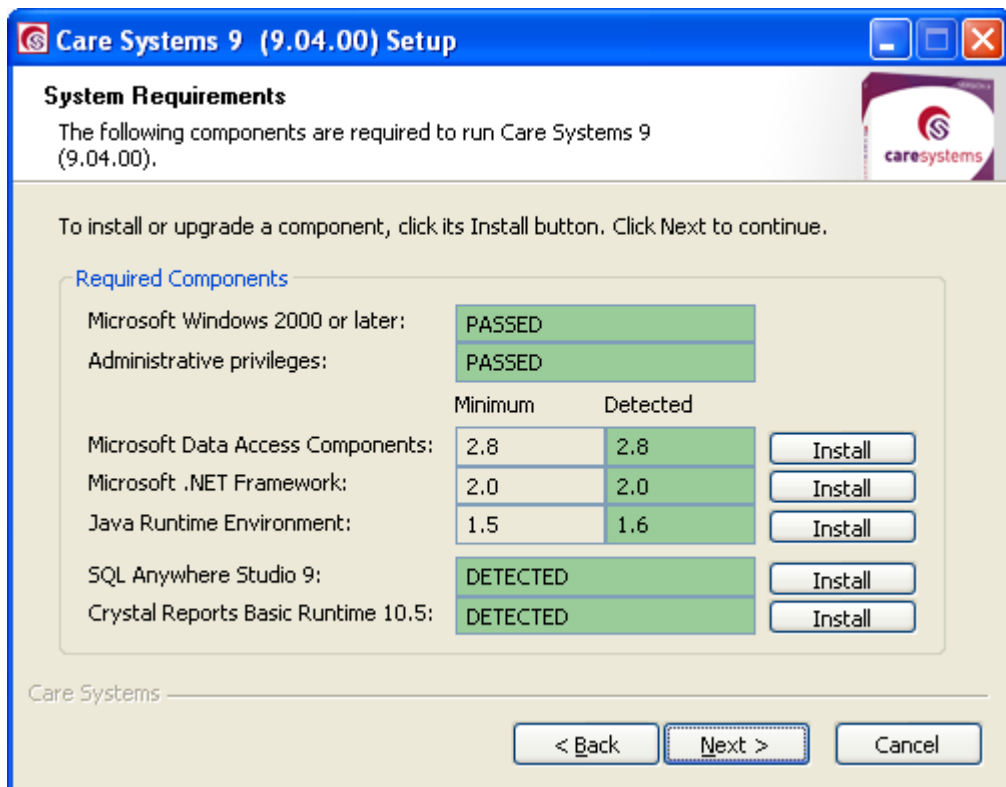
[\caresys9.exe](#)



Click Next

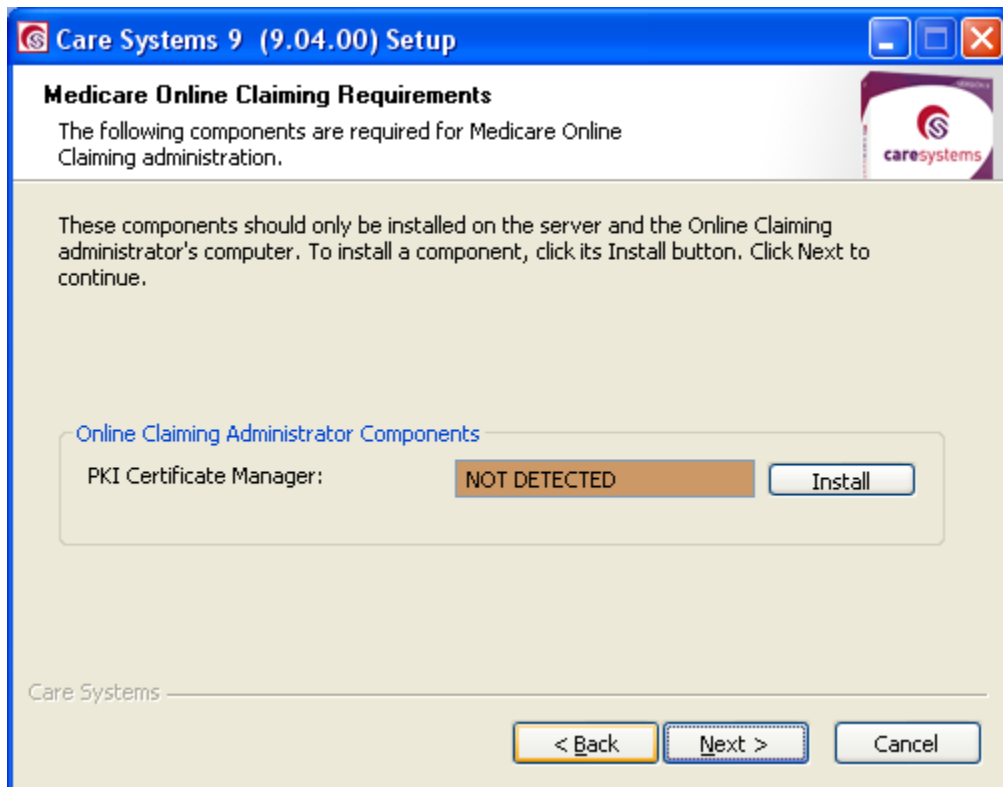


Check the License agreement, and click I Agree to continue.

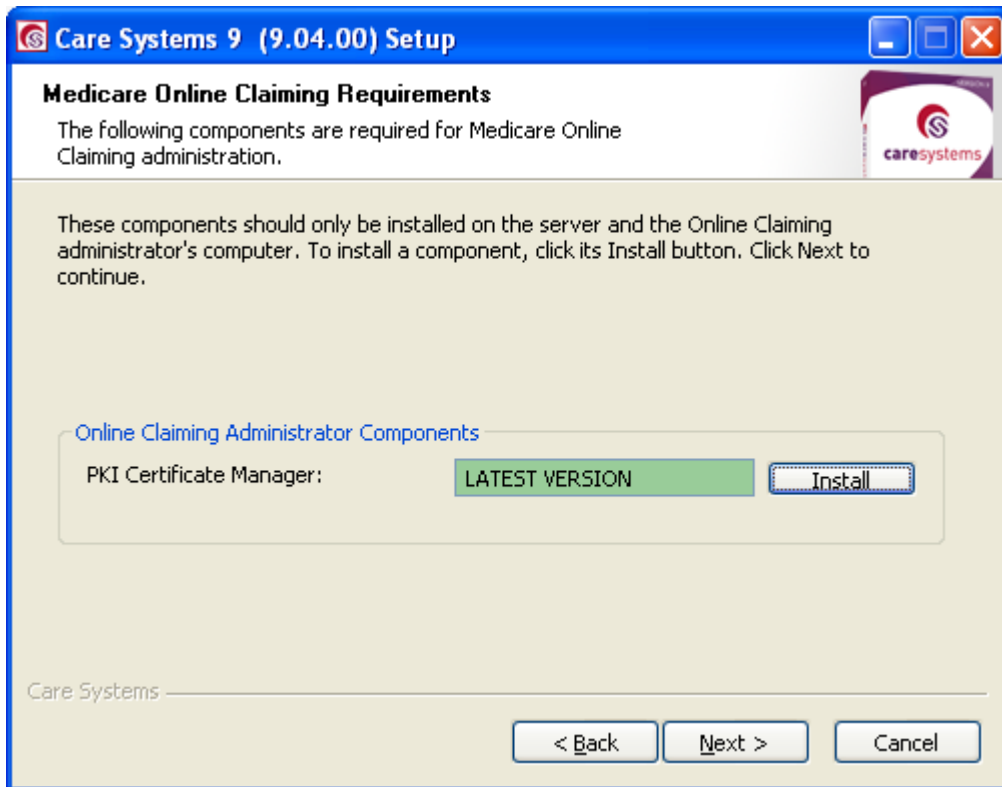


If the Crystal Reports Basic Runtime 10.5 in Not Detected, click the install button. See detailed instructions on installing this component in the section below.

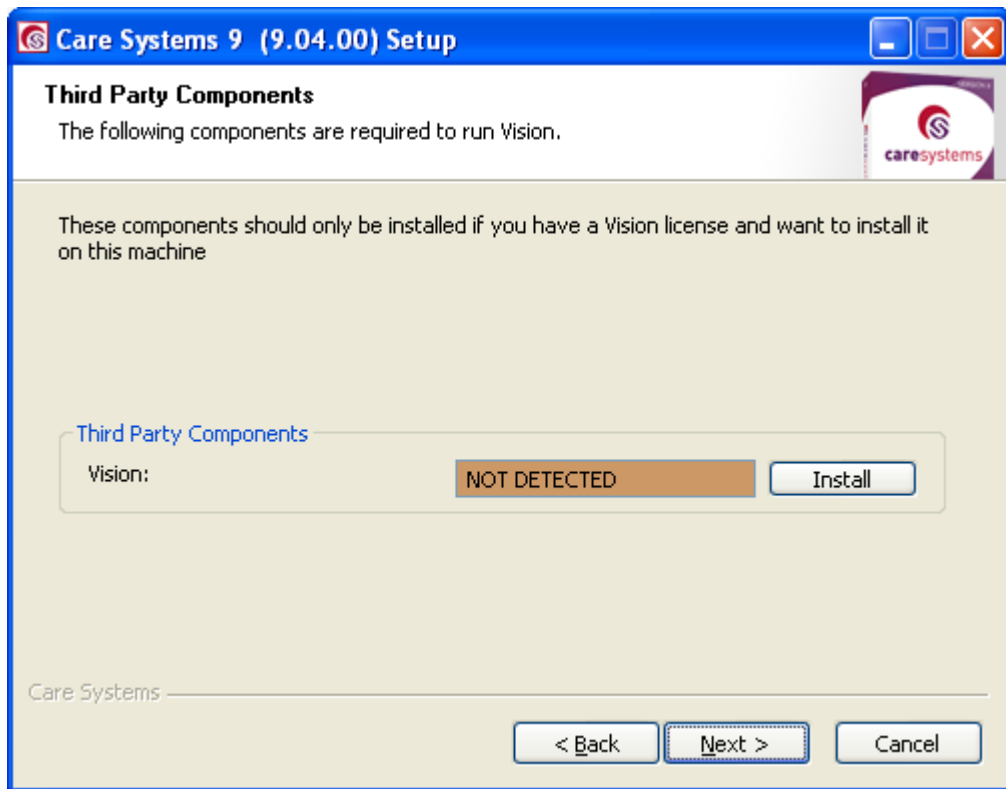
Once all required components are installed, click Next to continue.



If this computer is to be used to Administer the MediCare online claiming function, install the PKI Certificate Manager if it is not already installed. See detailed instructions on installing this component in the section below.



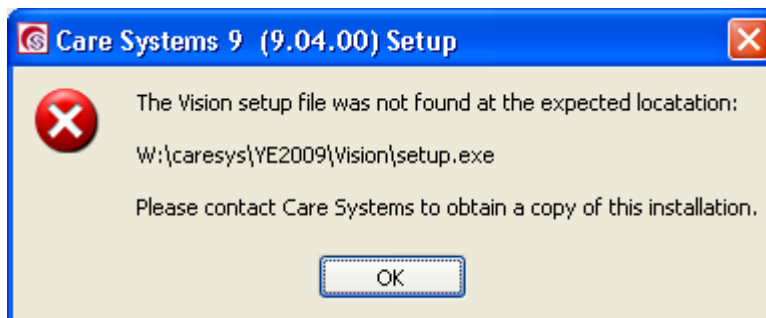
Once the certificate manager is installed, click Next to continue.



If required, click the install button to install Vision for Excel. Otherwise, click next. If you are uncertain whether to install Vision, please contact Care Systems Support. See detailed instructions on installing this component in the section below.

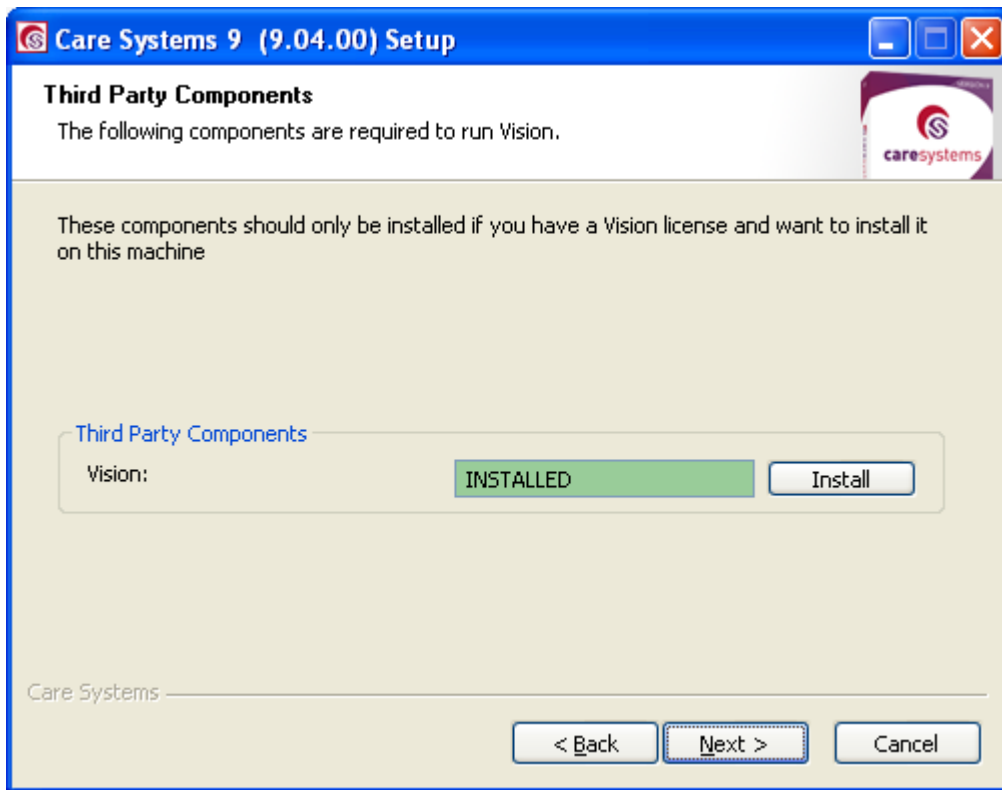
Vision does not need to be installed as part of the standard Care Systems 9 installation.

Note: The Vision installer is not included in all copies of the Care Systems 9 installation CD. If the Vision installer is not present, the following message will appear when the Install button is clicked:

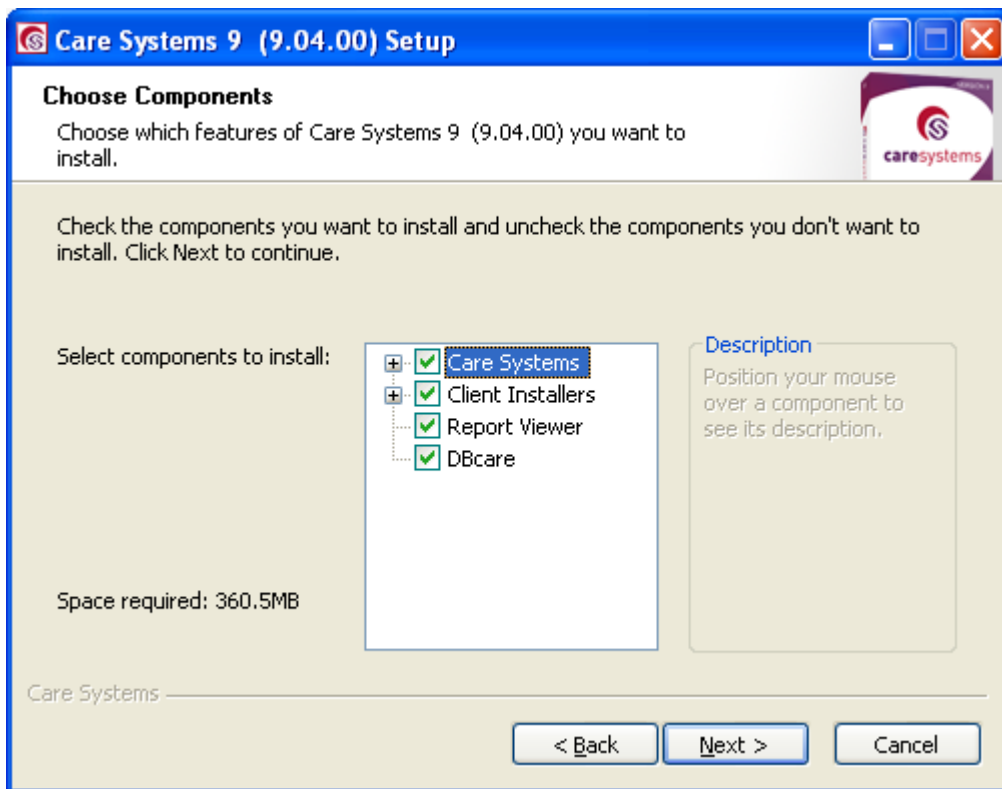


If this occurs, please contact Care Systems for assistance.

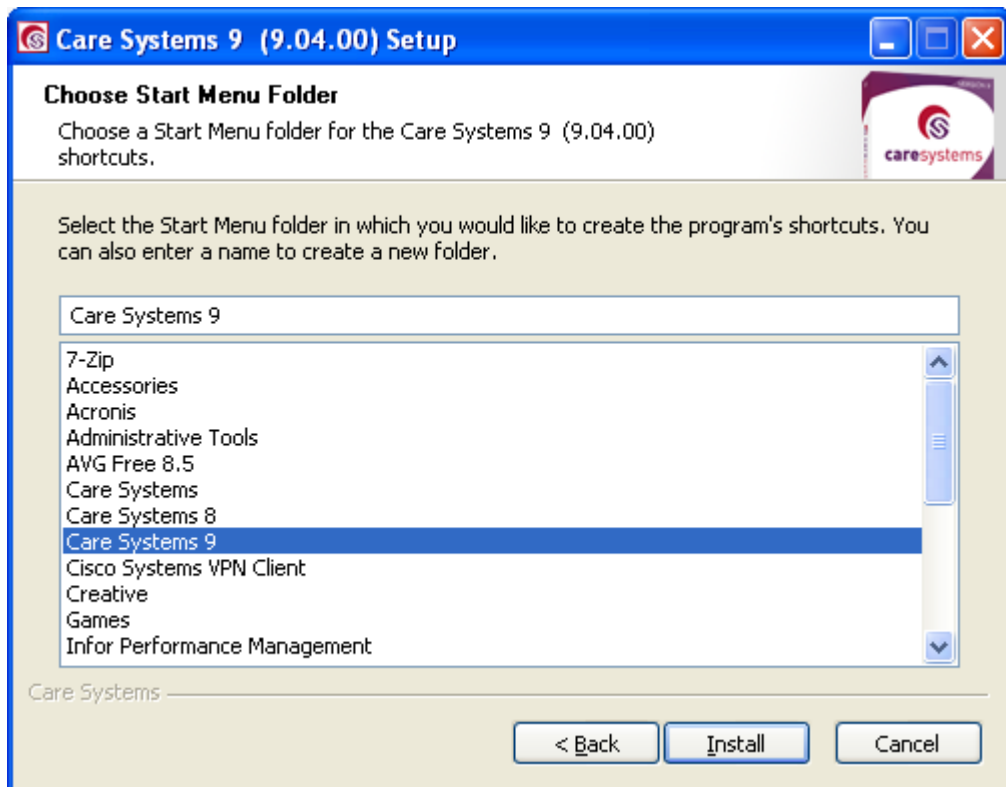
If the installation completes, the screen will display as follows:



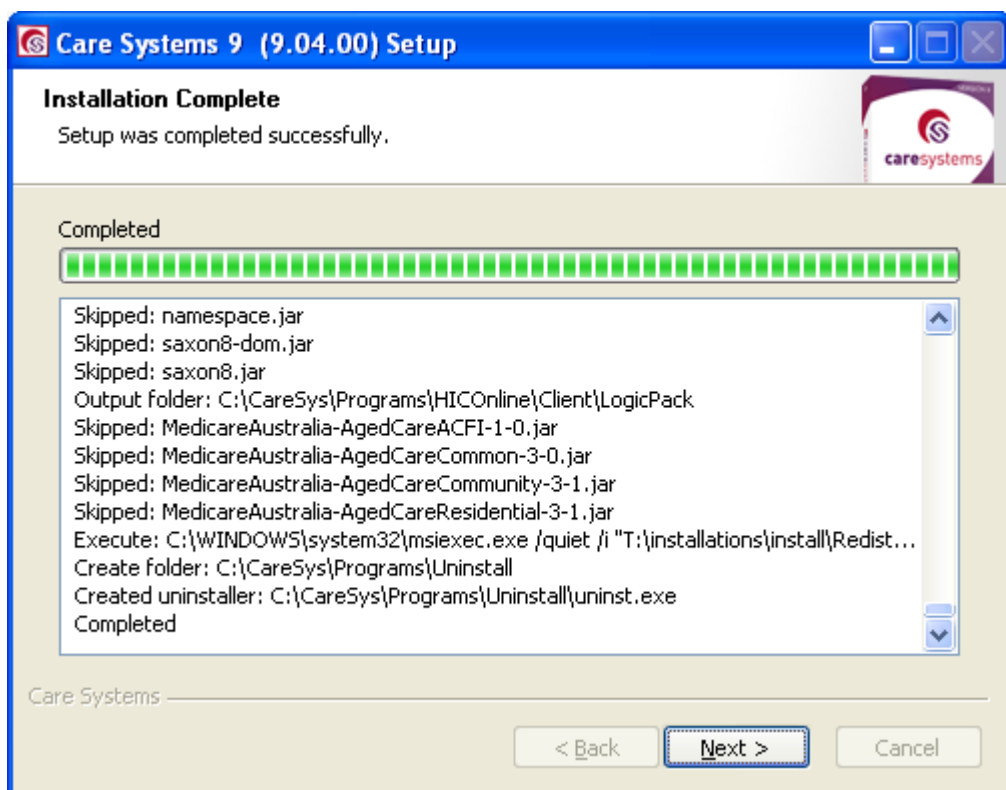
Click Next to continue.



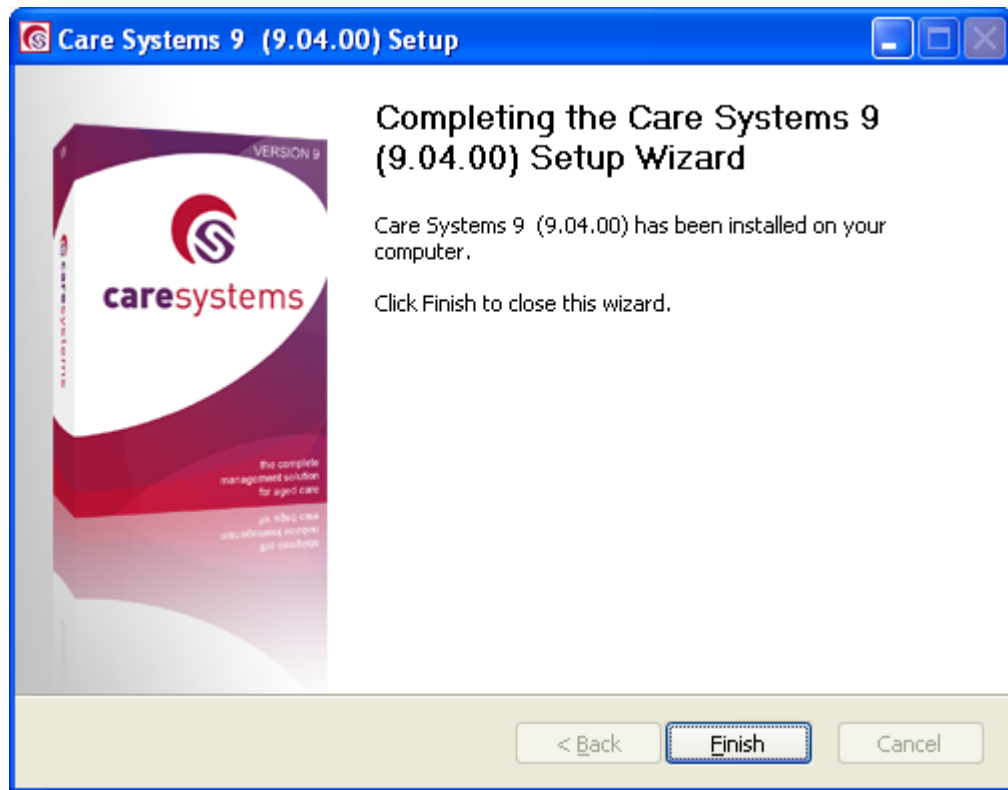
Select all options and click Next to continue.



Click Install to continue



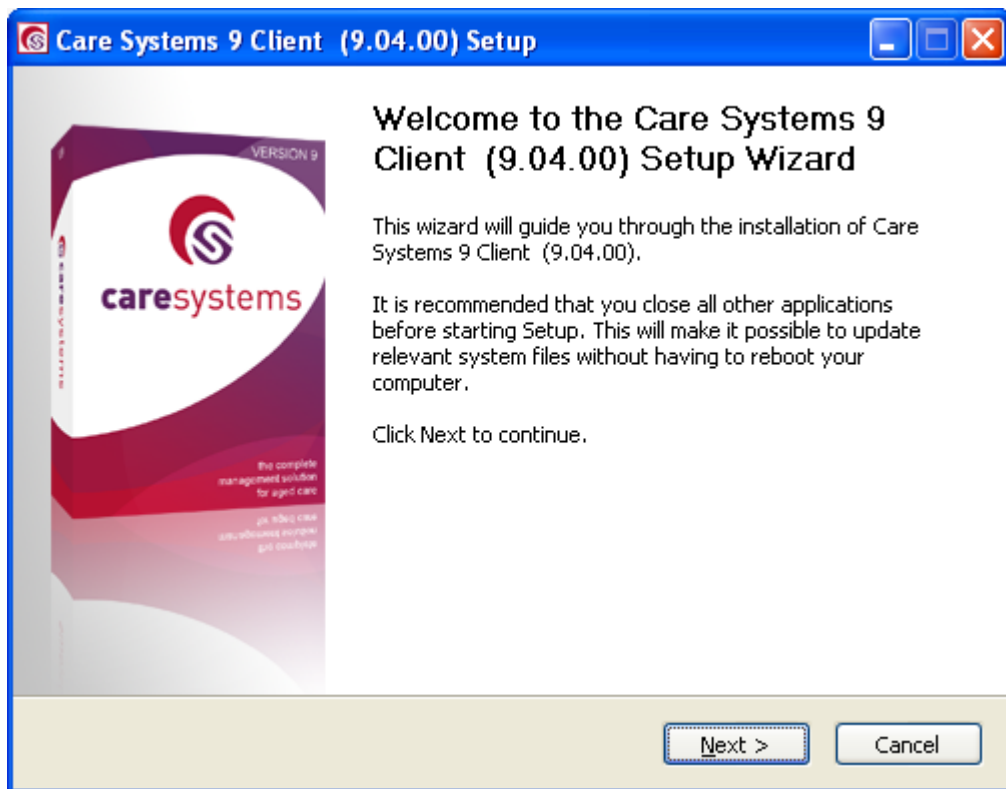
Click Next



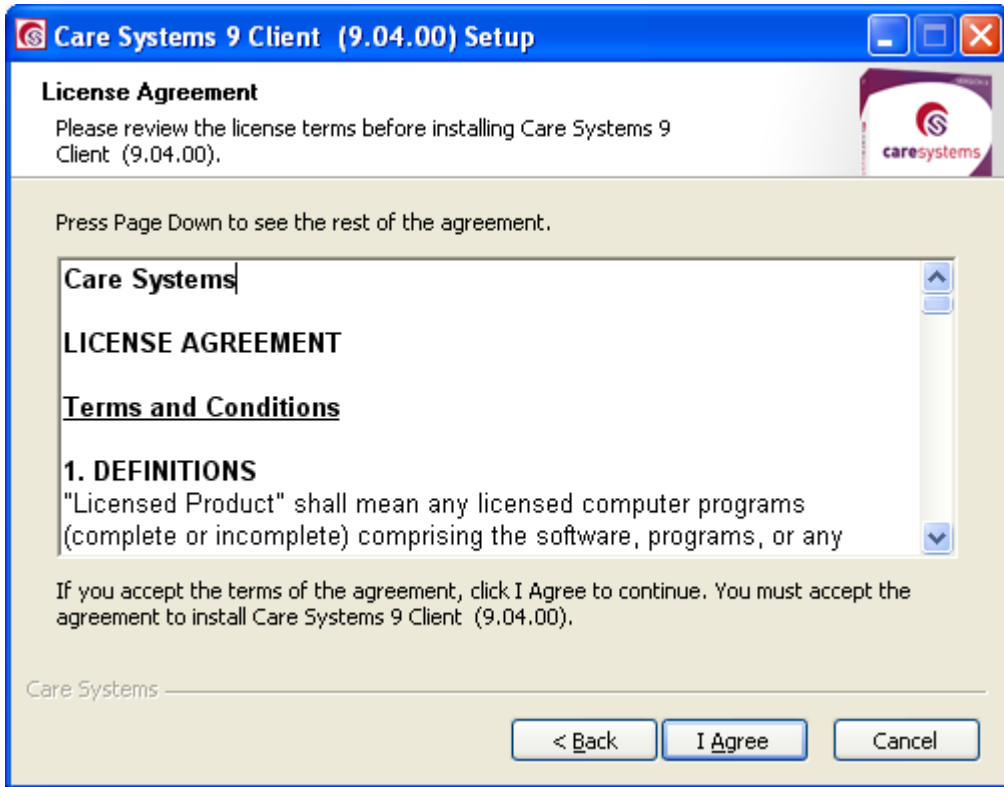
Click Finish.

Care Systems Client Installer

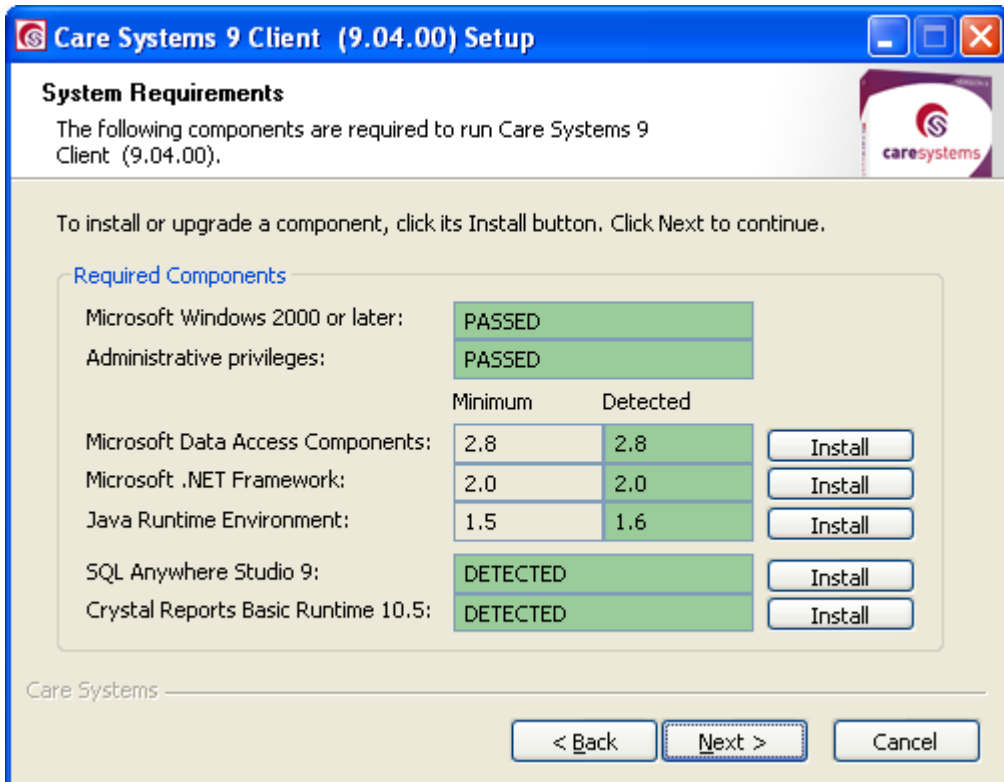
Run:
caresys9client.exe from the CD.



Click Next

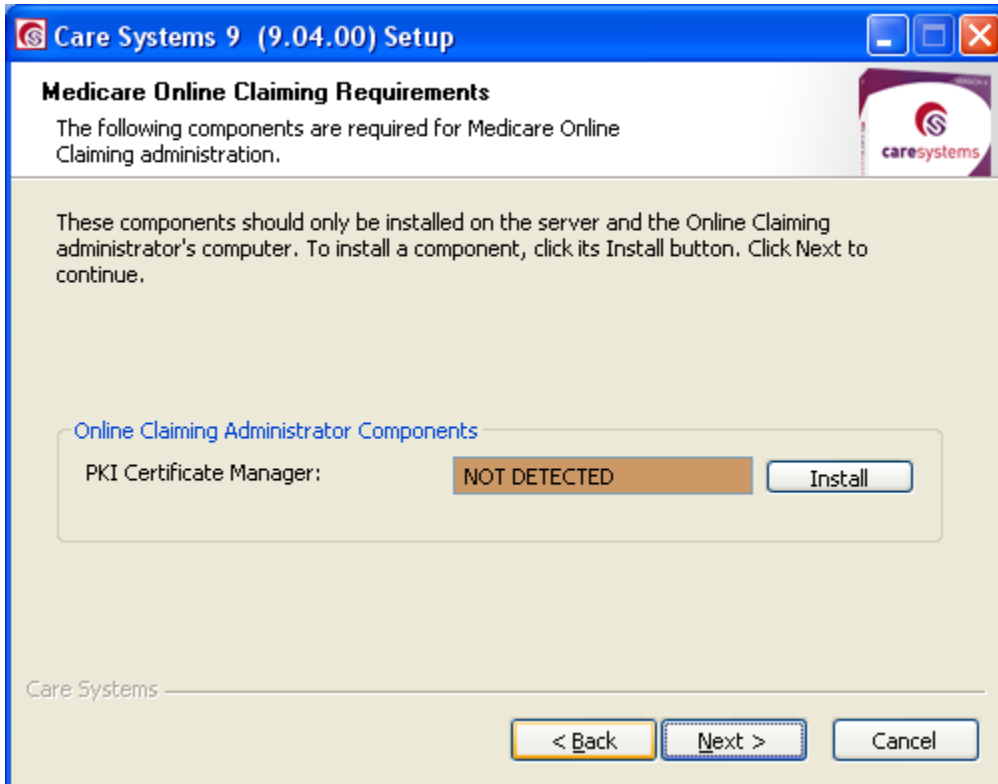


Check the License agreement, and click I Agree to continue.

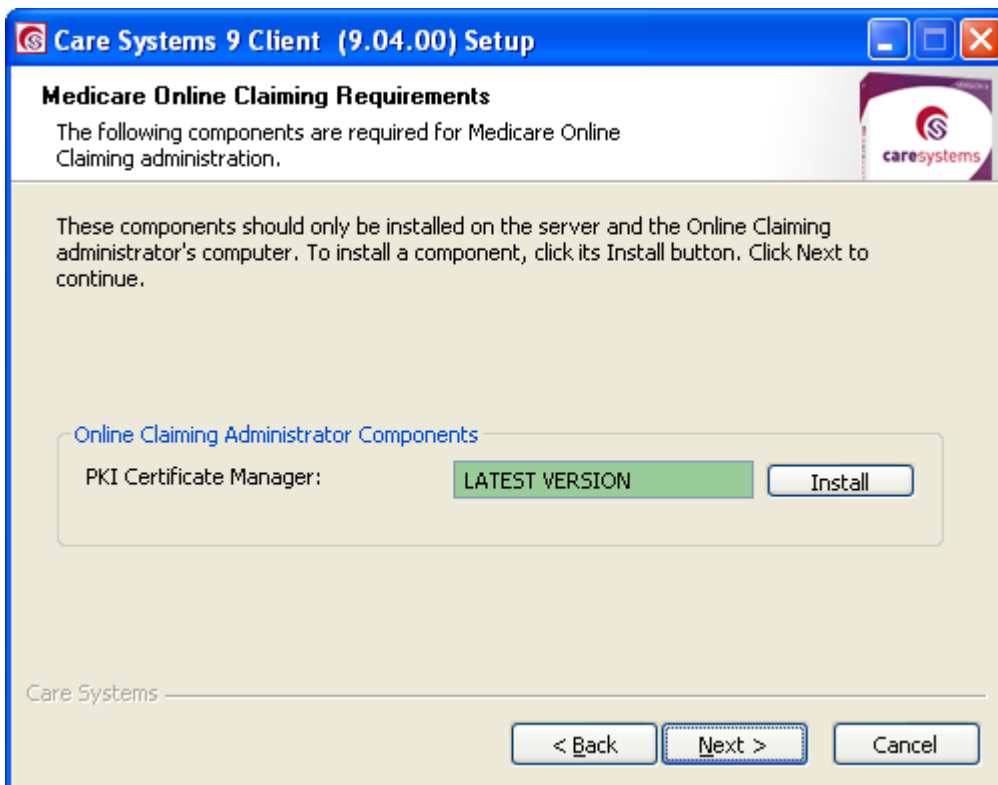


As with the server install, click the Install Button to install Crystal Reports Basic Runtime 10.5 if it is not already installed. Once installed, click next. See detailed instructions below for installing this component.

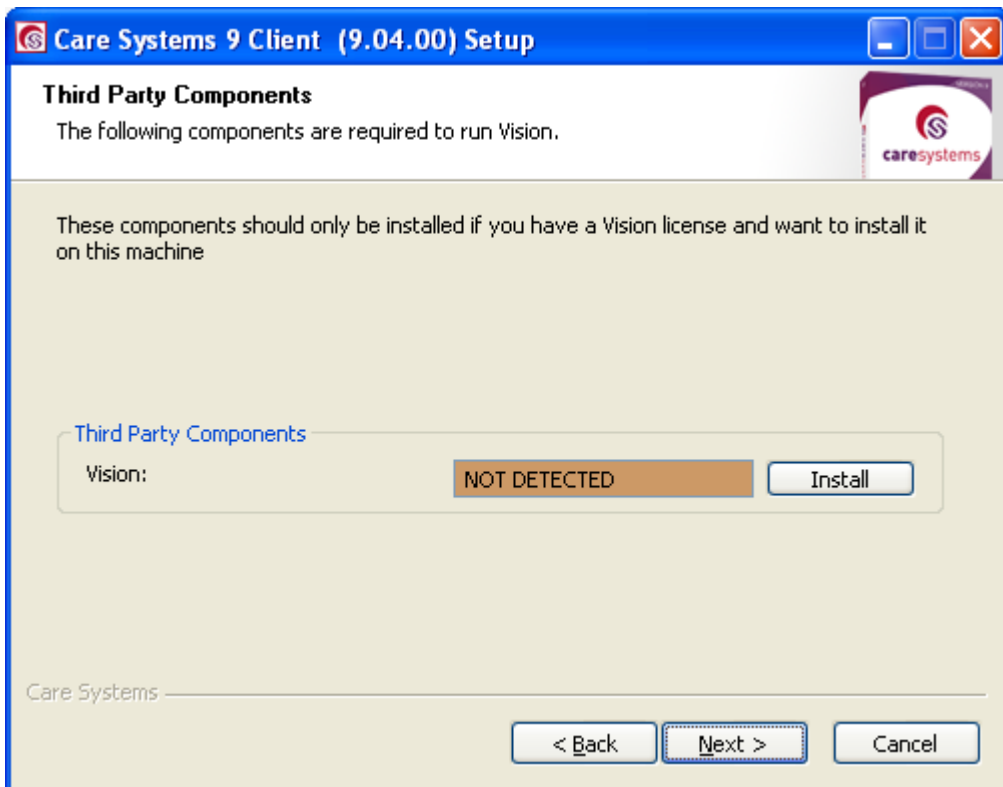
Once all required components are installed, click Next to continue.



If this computer is to be used to Administer the MediCare online claiming function, install the PKI Certificate Manager if it is not already installed. See detailed instructions on installing components in the section below.



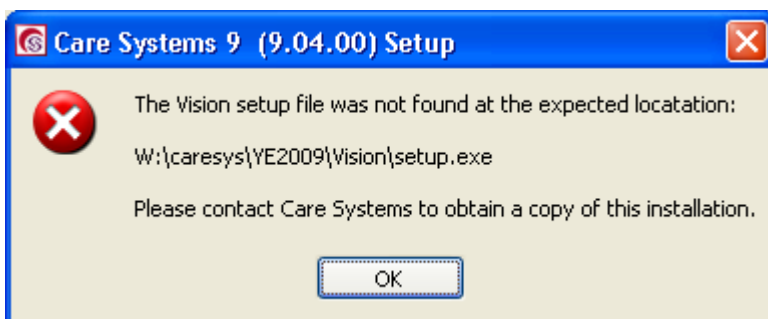
Once all Online Claiming components are installed, click Next to continue.



If required, click the install button to install Vision for Excel. Otherwise, click next. If you are uncertain whether to install Vision, please contact Care Systems Support. See detailed instructions on installing this component in the section below.

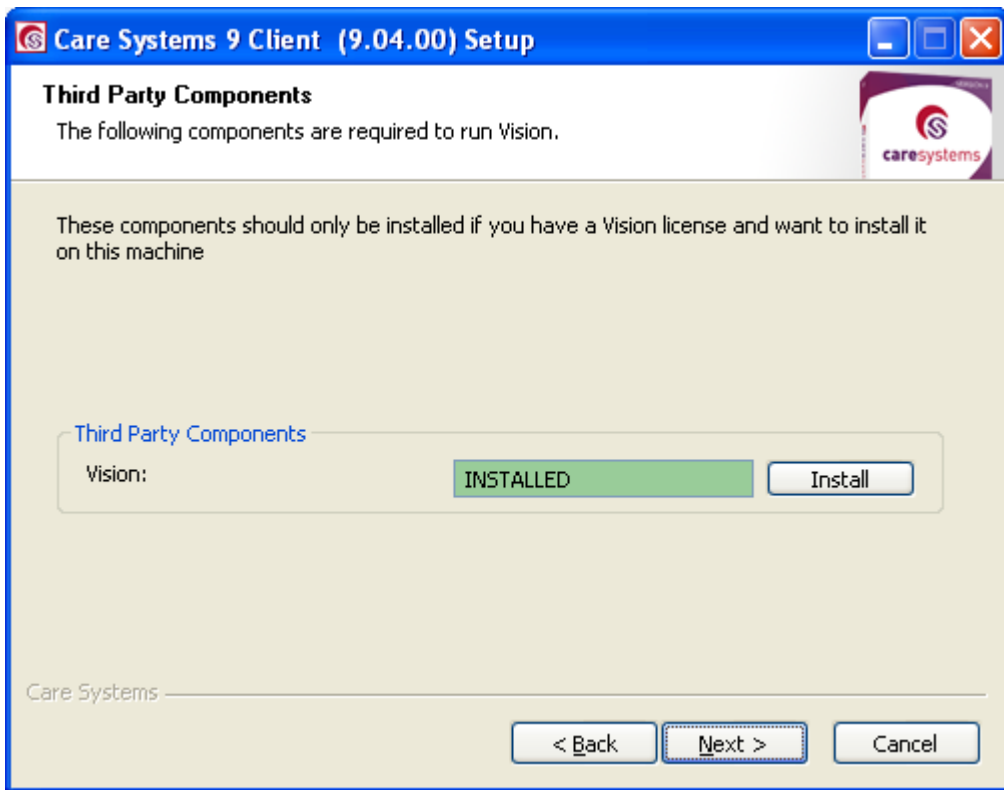
Vision does not need to be installed as part of the standard Care Systems 9 installation.

Note: The Vision installer is not included in all copies of the Care Systems 9 installation CD. If the Vision installer is not present, the following message will appear when the Install button is clicked:

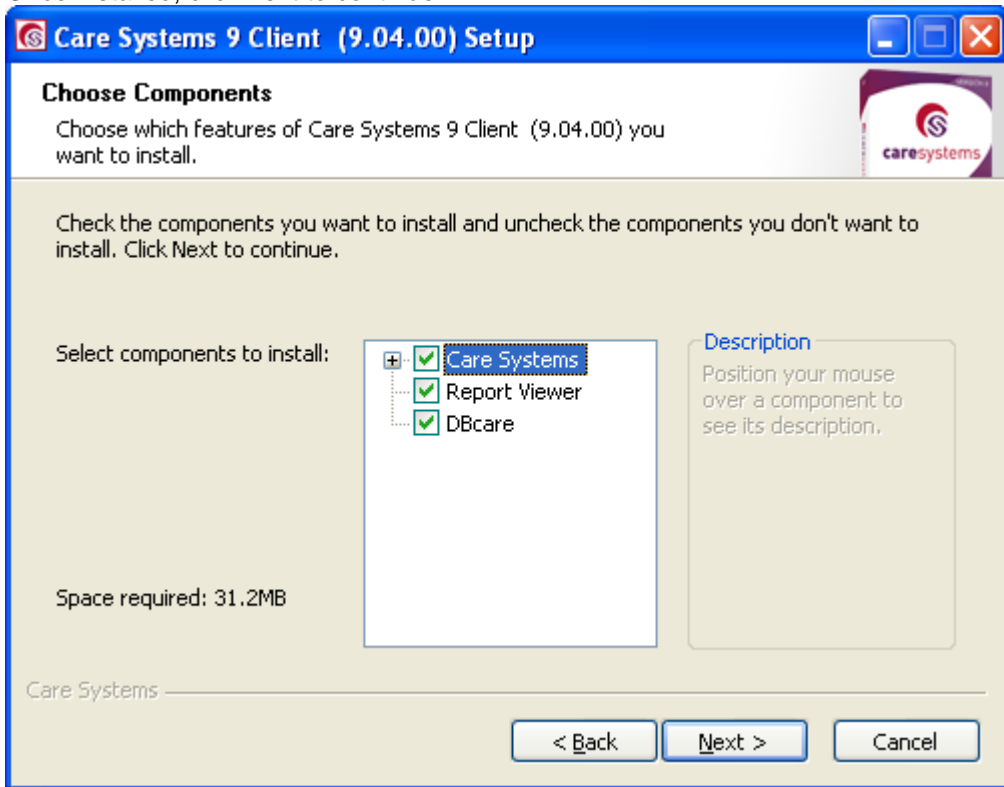


If this occurs, please contact Care Systems for assistance.

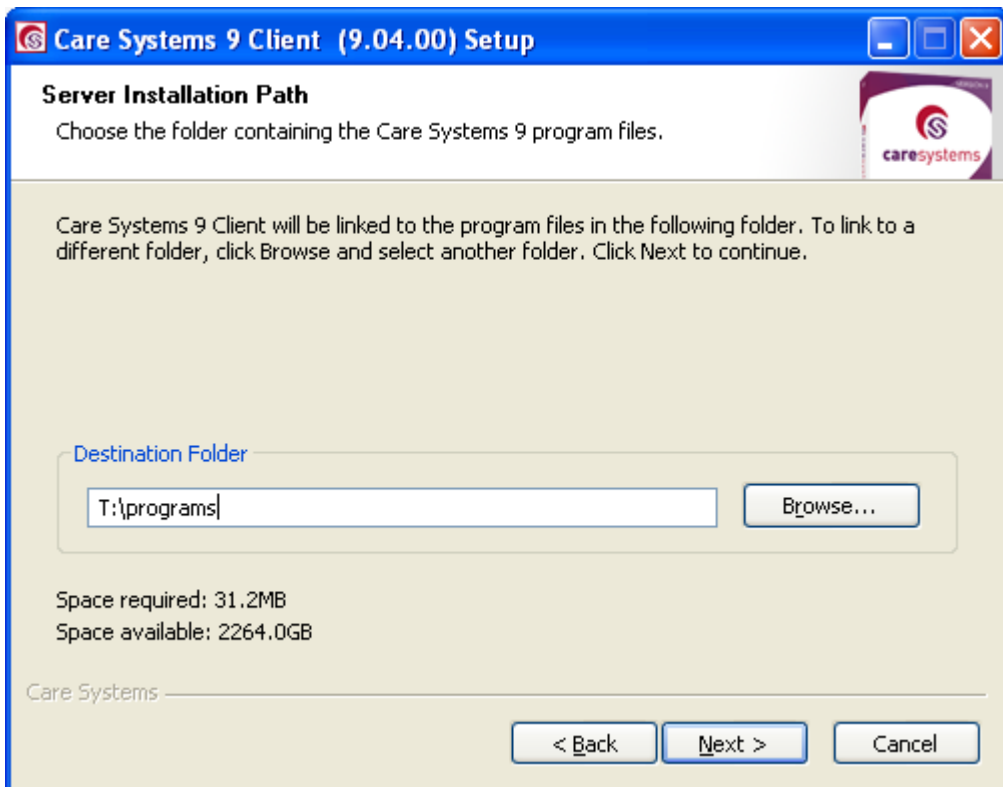
If the installation completes, the screen will display as follows:



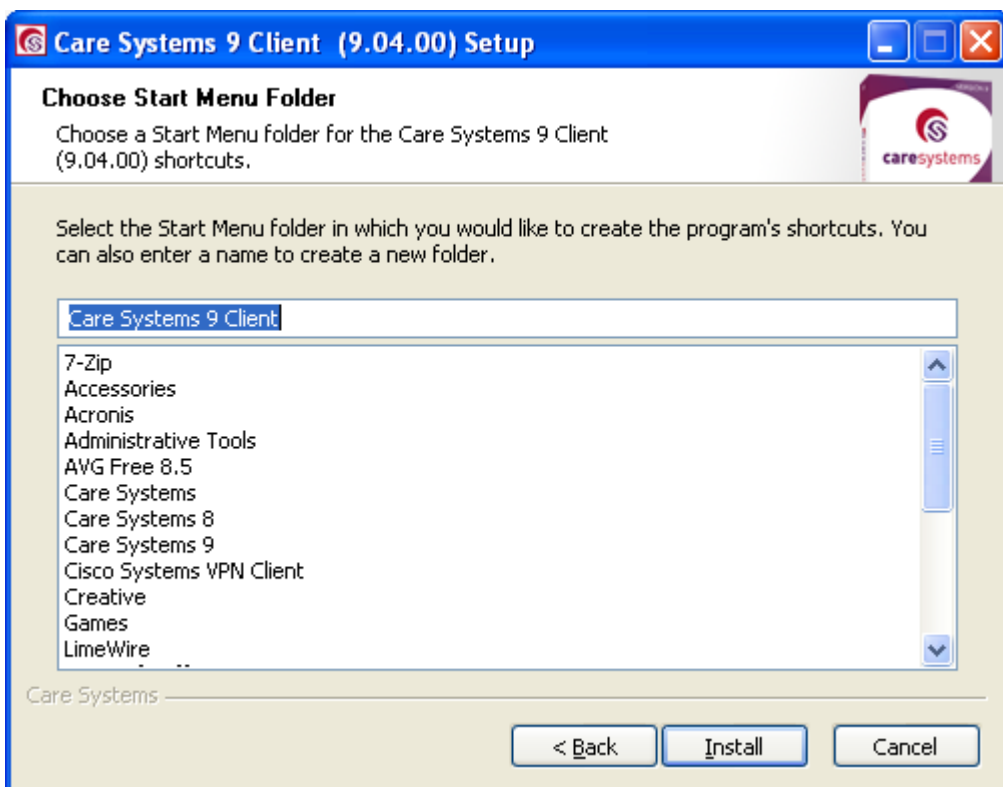
Once installed, click next to continue.



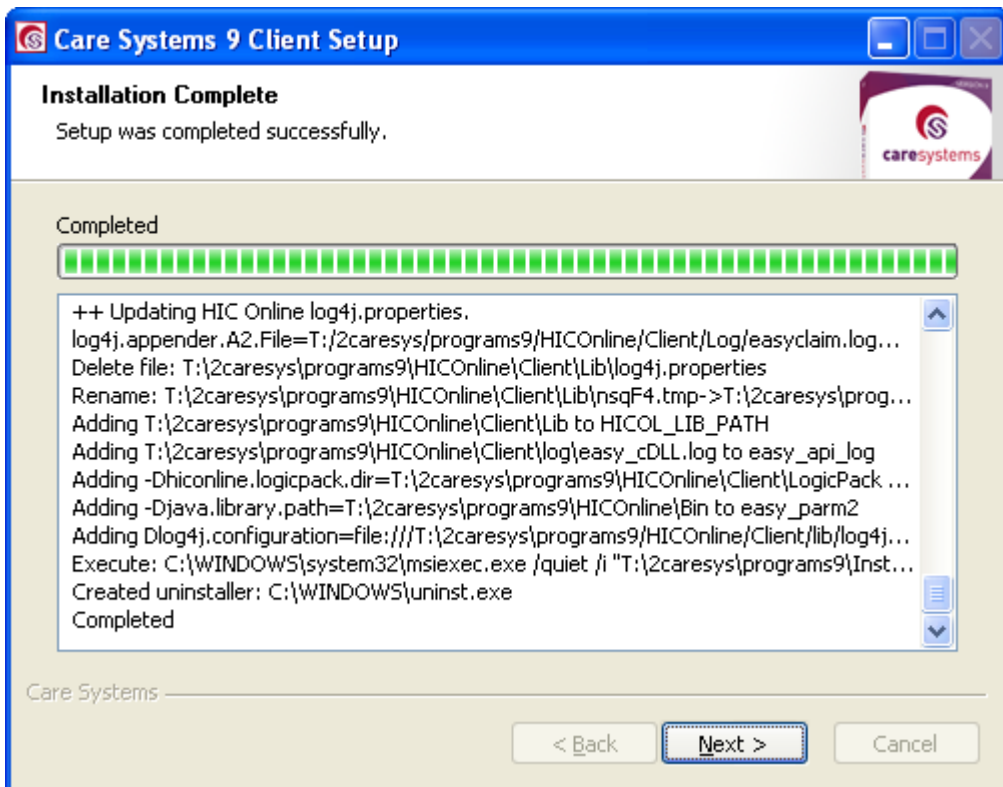
Select all options and click Next to continue.



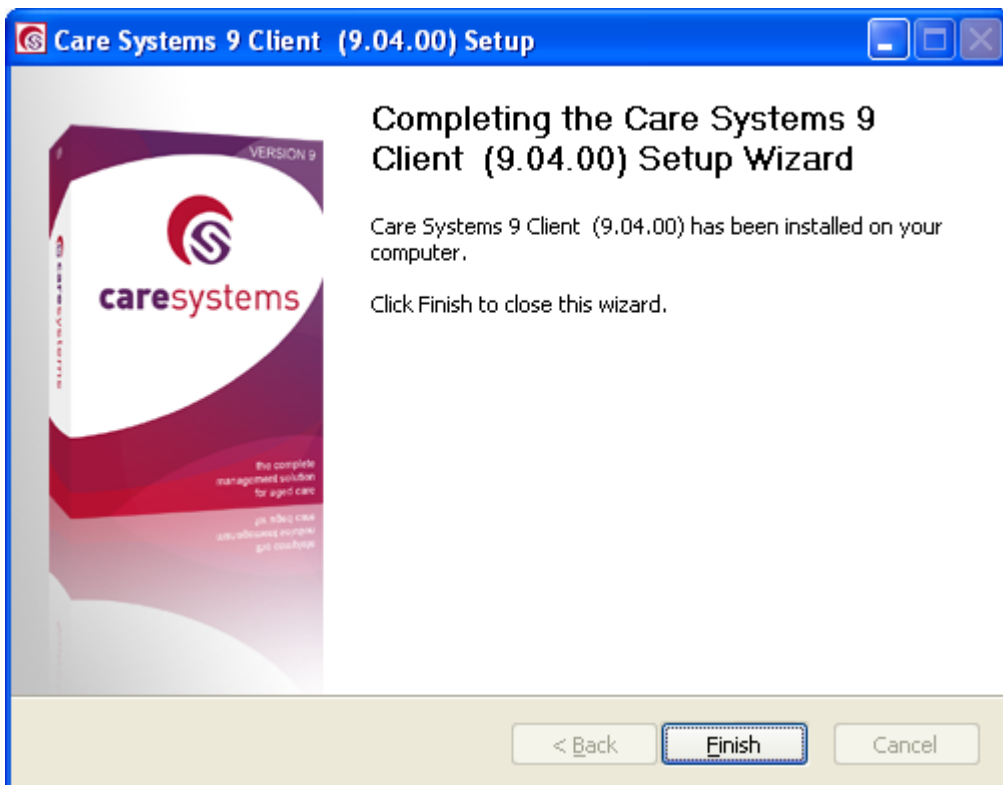
Check the installation path points to the caresys\programs share on the server and click Next to continue.



Click Install to continue



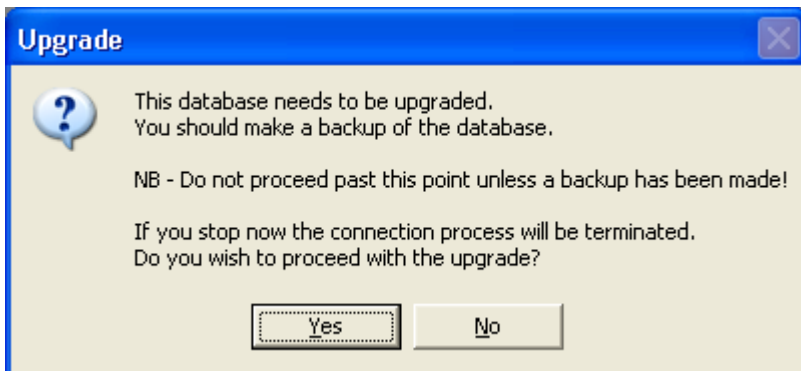
Click Next



Click Finish

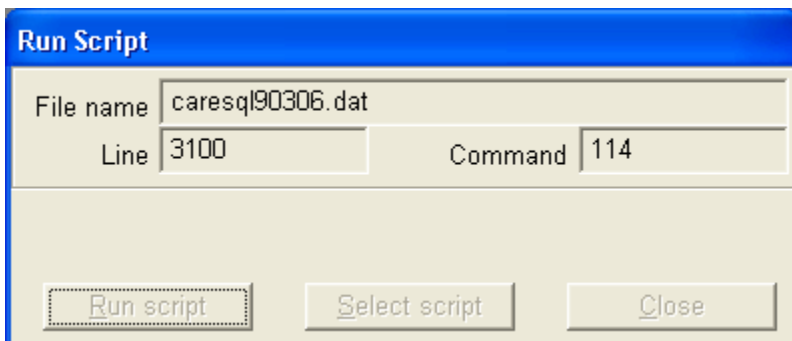
Upgrading your database

When starting the new Care Systems 9.4 programs and connecting to your database for the first time, a database upgrade will need to be performed. The following message will appear:

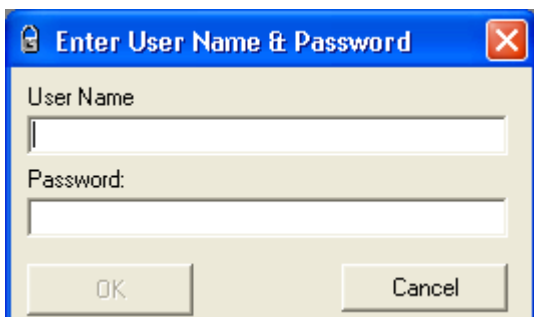


If your database has been backed up, press Yes to proceed.

As the database upgrade is processed, a screen similar to the following will be displayed. Several upgrade file names (with name caresql???.dat) may appear in this window during the upgrade process.



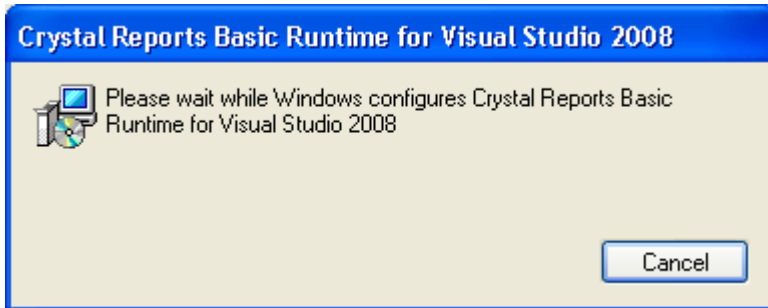
When the process is complete, the normal logon screen should appear:



If this does not occur, please contact Care Systems for assistance.

Appendix 1: Prerequisite Installations

Crystal Reports Basic Runtime for Visual Studio 2008



Appendix 2: Optional Installations

PKI Certificate Manager Installation

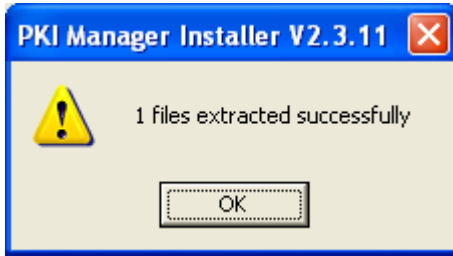
The PKI Certificate Manager is only required if this computer is to be used to Administer the MediCare online claiming function.



Click I Agree to continue

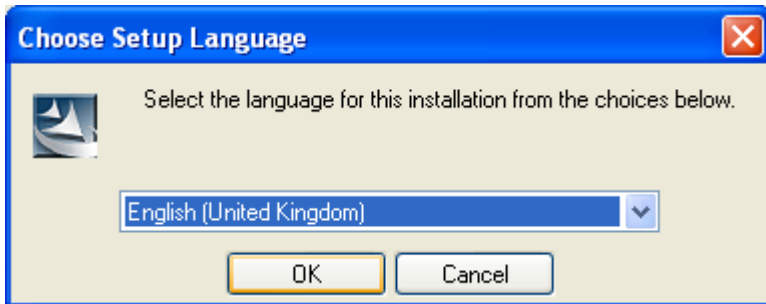


Click Install to continue

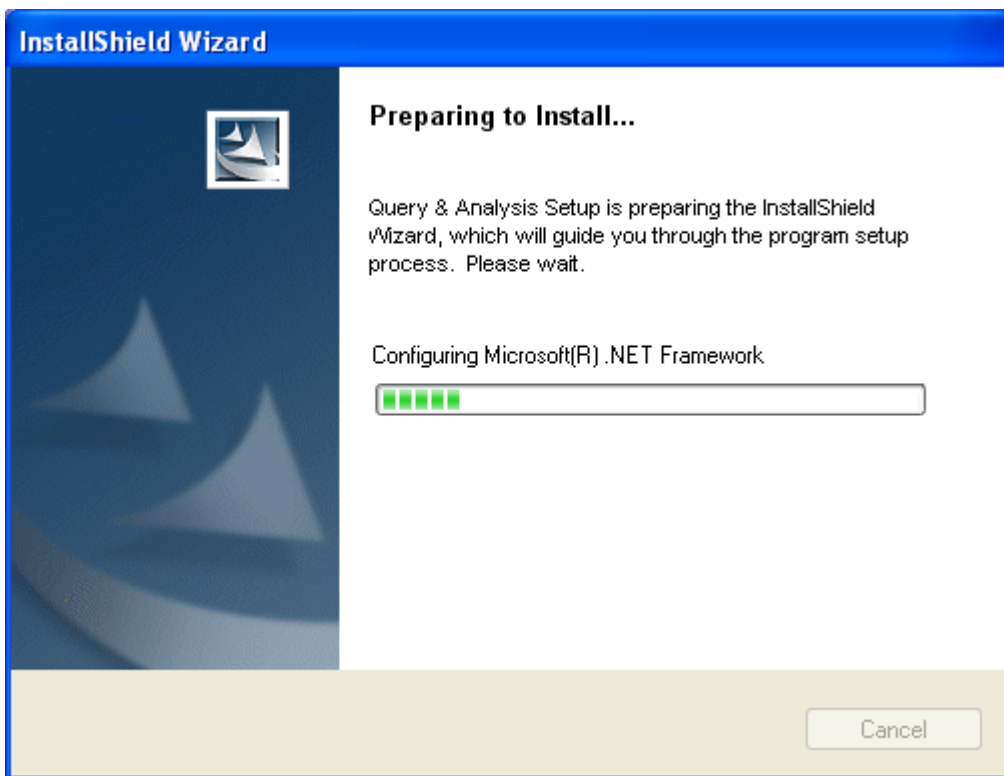


Click Ok to exit the installation

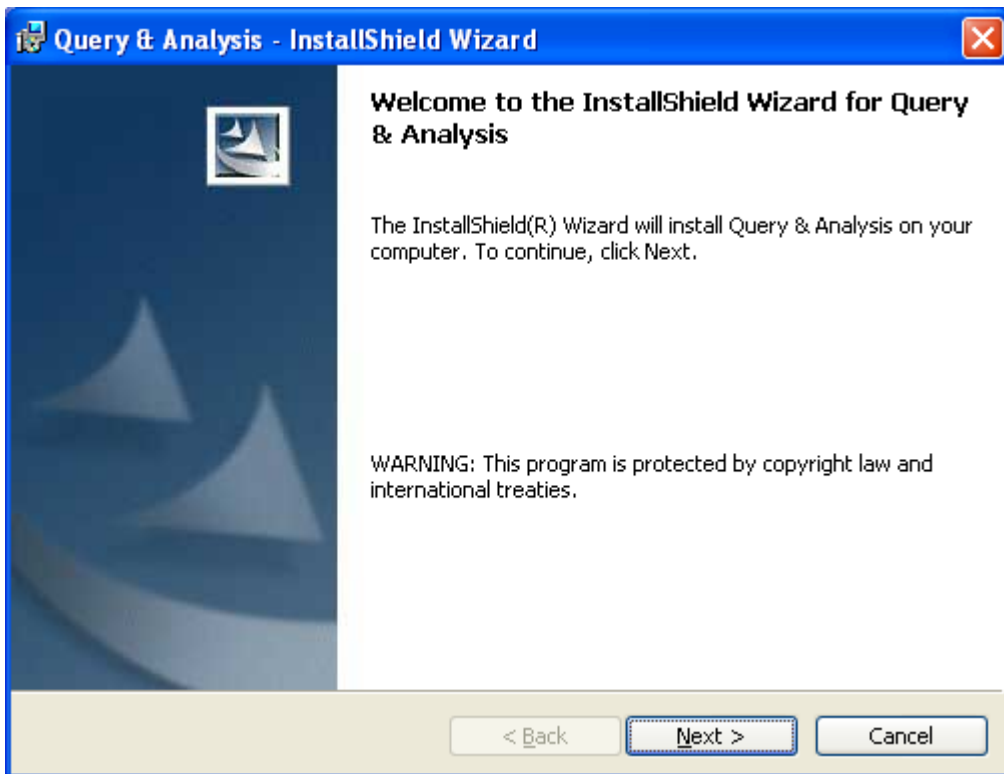
Vision Installation



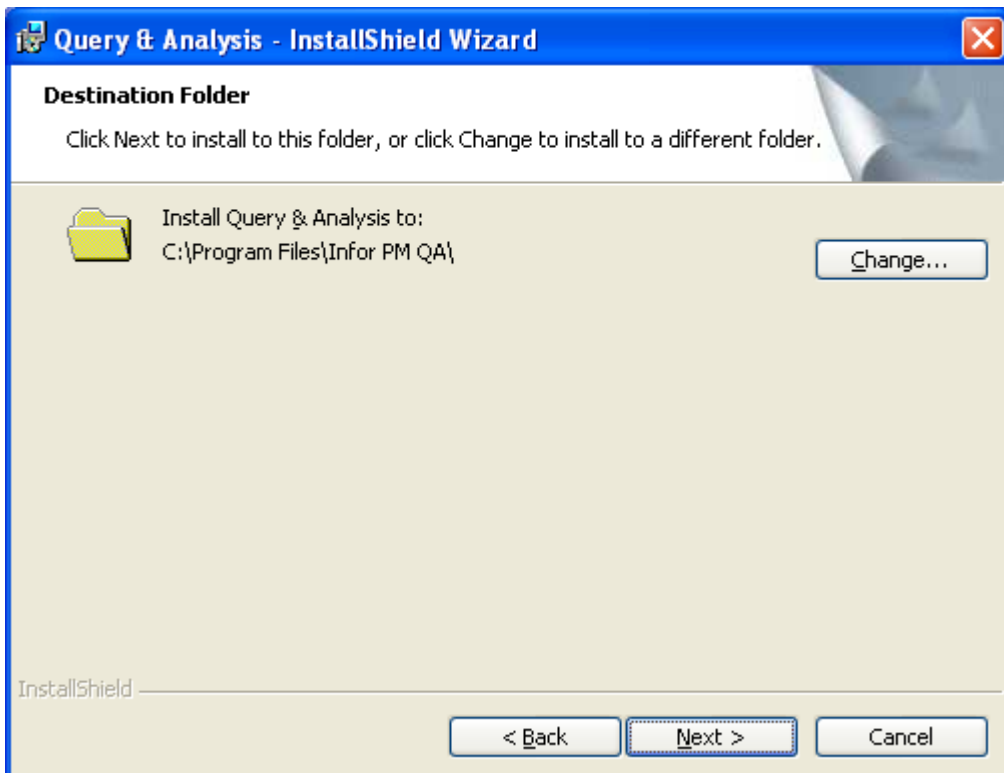
Choose the appropriate language. Click OK.



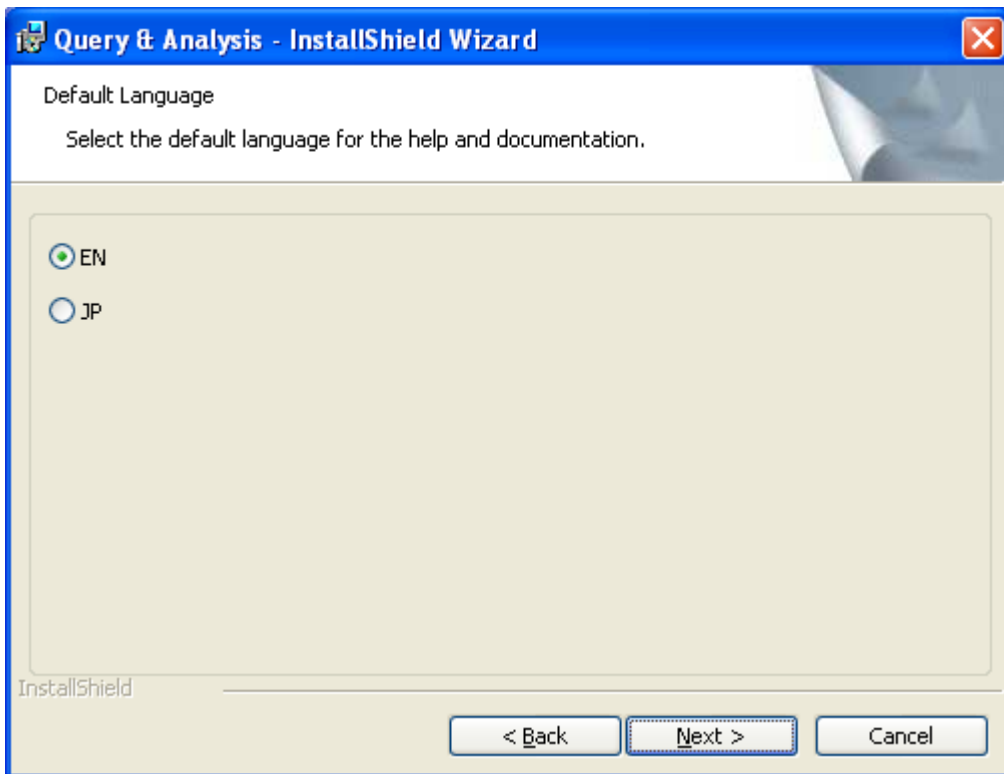
Wait while the installer configures the .NET framework.



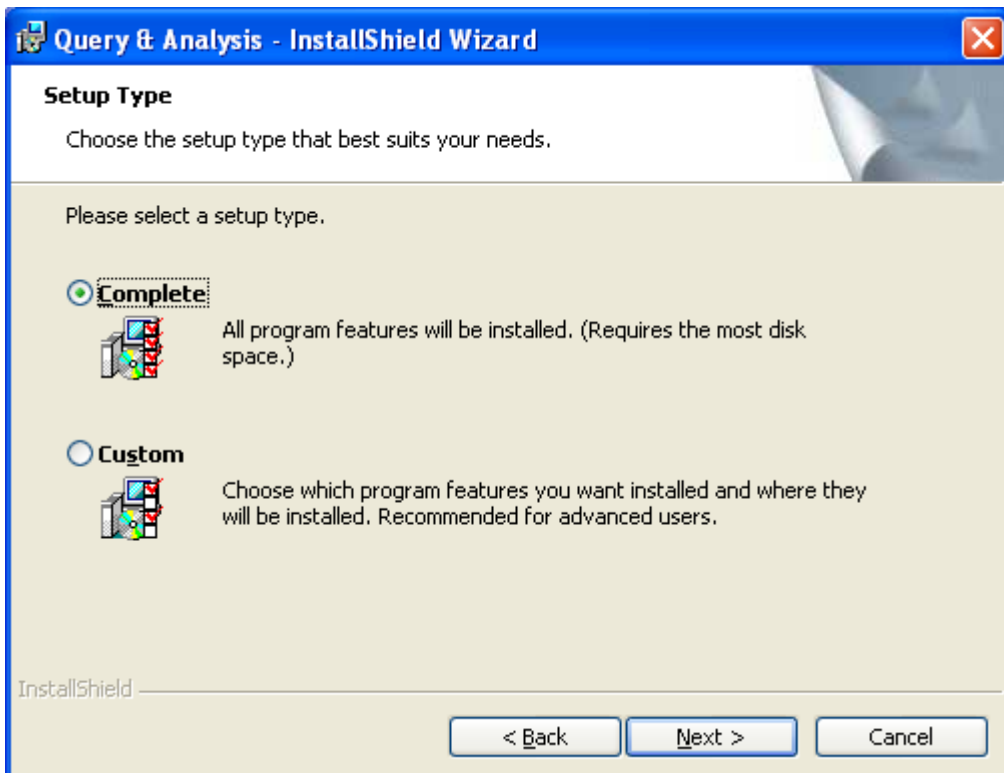
Click Next



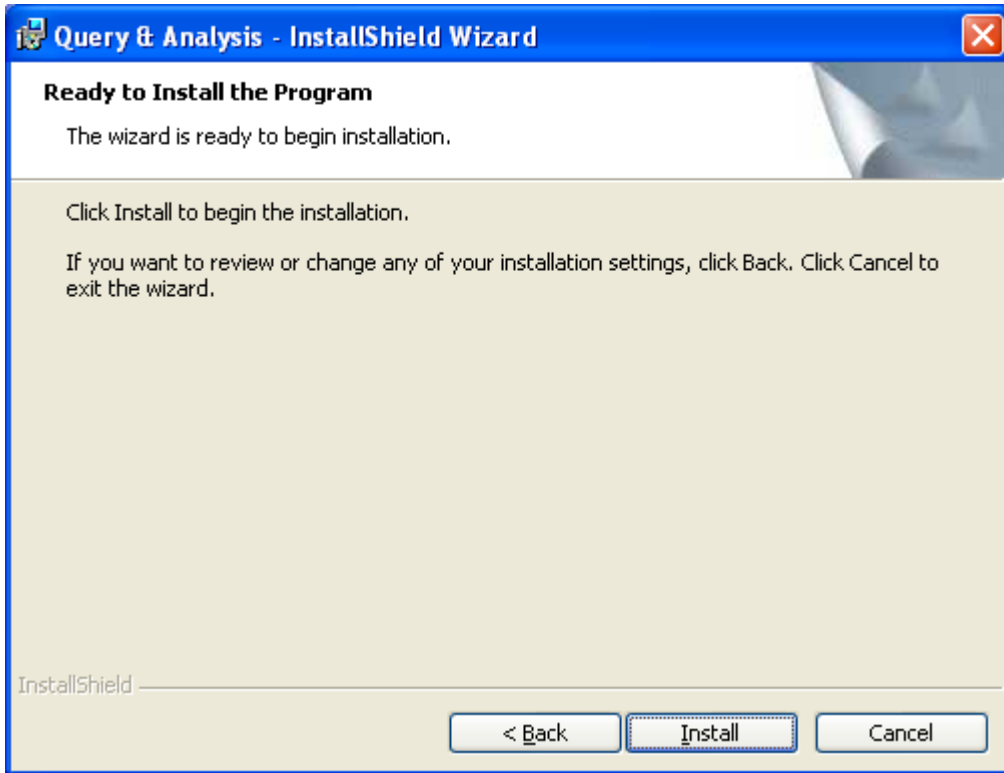
Change the installation folder if required (not recommended). Click next.



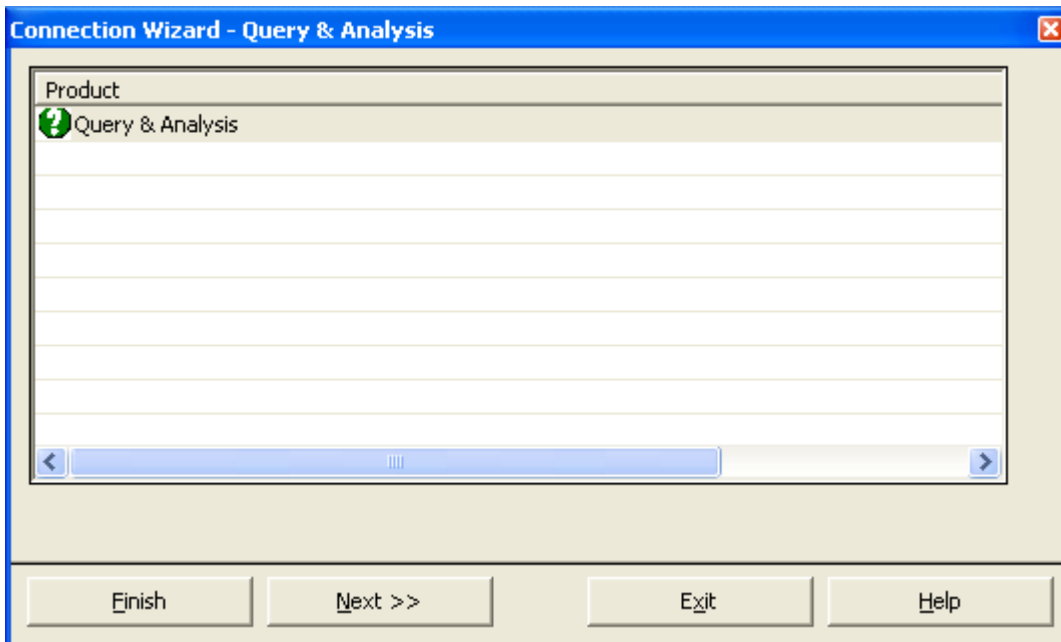
Select EN and click next.



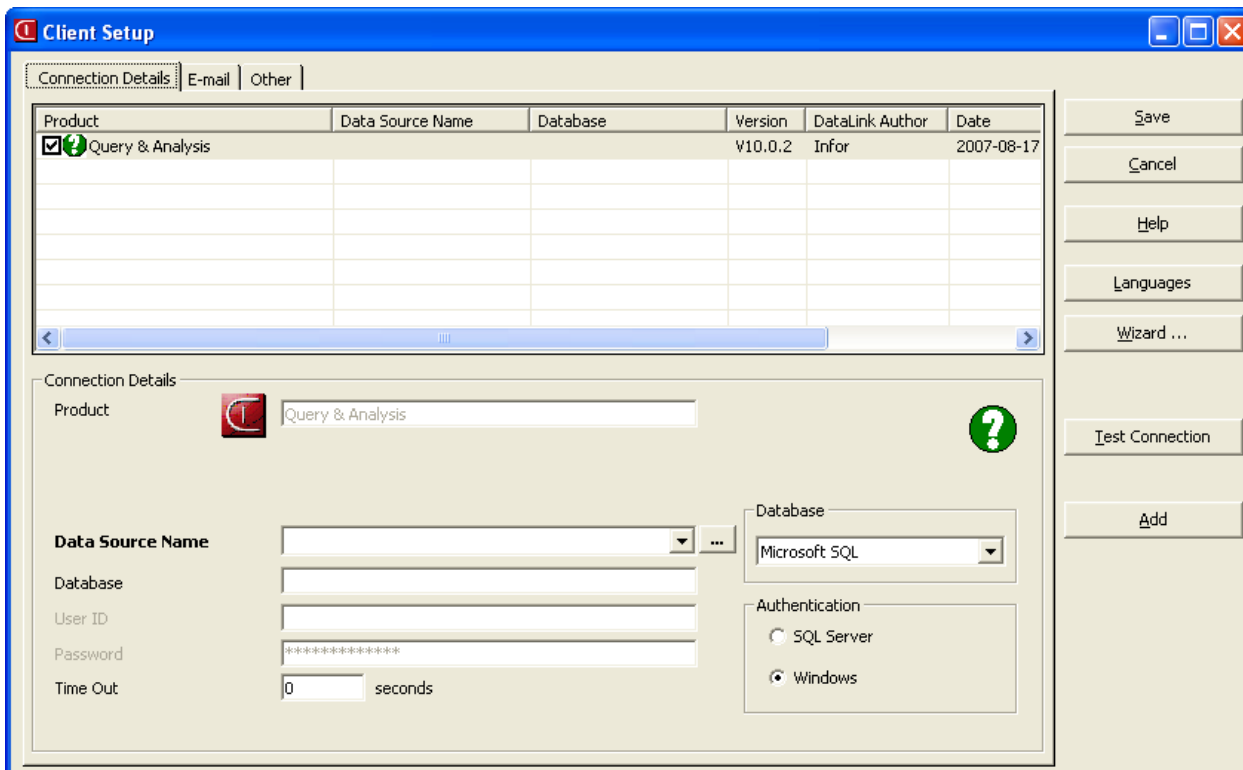
Click Next



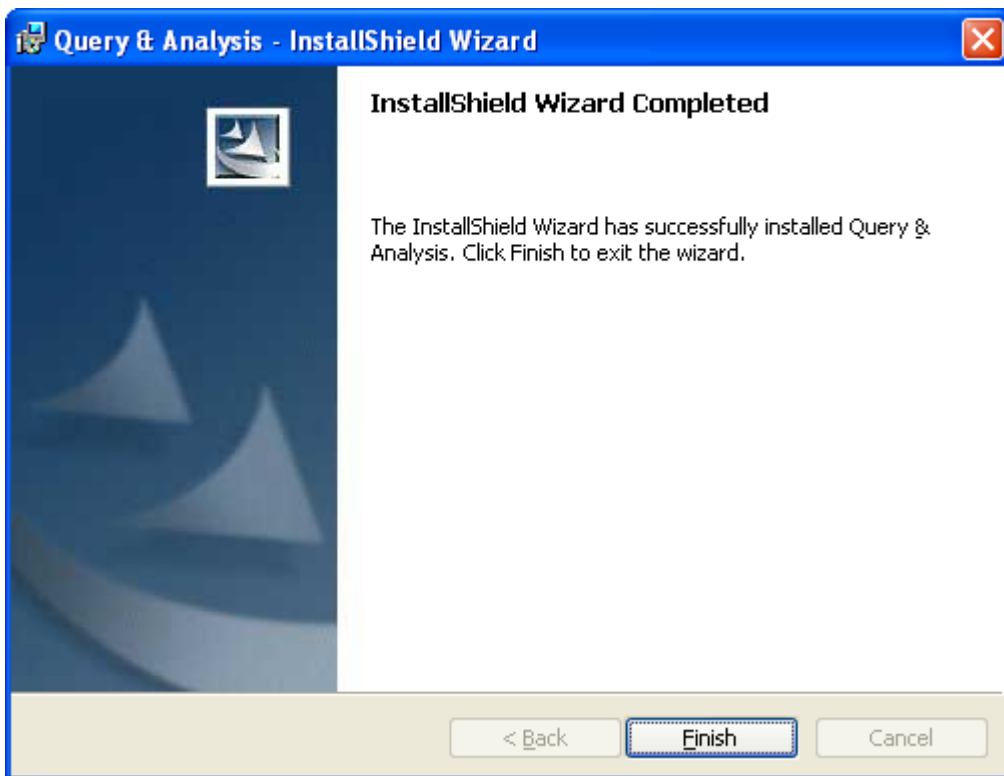
Click install



Click Finish



Click Save



Click Finish.