

Steps to Take Before Upgrading Software

Before every software upgrade, a number of basic steps should be taken to protect your system and/or data. The following outlines a number of steps most Computer Administrators would take before performing the upgrade process. These steps should not be taken as conclusive as every situation may be different and require more or fewer steps of protection. Having said that, we would strongly recommend following at least the following steps.

1. Check the installation notes that accompany the upgrade to see if there have been any changes to hardware specifications. Compare against all PCs on the practice network to see if an upgrade can be achieved. In particular, ensure there is sufficient disk space and RAM.
2. Read the installation notes and consider any implications or preparation work specifically mentioned.
3. Schedule the upgrade in advance and warn all users it will be taking place.
4. Schedule the upgrade after hours or at a quiet time when the system is not needed to be used for several hours.
5. As a precaution, print out appointment lists for the following day.
6. Have the technical support contact details handy.
7. Perform a backup and trial-restore to ensure the data can be recovered. Also consider creating a restore point if you use Windows XP.
8. Ensure that no users are accessing the system during the upgrade.
9. Disable virus-checking software that runs in the background during the installation.
10. If a program is designed to run on the server and users share common data files stored on the server, upgrade the server first.
11. After installation, reboot the Server/PC to ensure everything is updated and completed.
12. Reapply service packs if necessary and reboot.
13. Upgrade other PCs if necessary using network upgrade features or individual installation on each workstation. Check the installation notes for altering any paths to the data files as the location may have changed since the upgrade.