DENTRIXENTERPRISE

DENTRIX ENTERPRISE 8.0.5

CLIENT INSTALLATION GUIDE

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PRACTICE SOLUTIONS

Publication Date

July 2015

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Introduction

This document covers the following topics to assist you in installing and configuring the Dentrix Enterprise software:

- Before You Install
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- Running an Unattended Installation or Upgrade
- Setting up a Share on the File Server
- Configuring Client Network Connectivity
- Setting up the ODBC
- Installing on Citrix and Terminal Servers

Before You Install

Verify the following prior to installing Dentrix Enterprise:

- For a first time installation of Dentrix Enterprise, your database server must be set up with an instance of Microsoft SQL Server 2005 or 2008 and have a Dentrix database. Also, the server and client tools for Microsoft SQL must be installed on the database server.
- Set up two different databases: a test and a production.
- Have a backup and restore plan for all important databases. See the Microsoft SQL Server database maintenance documentation for more information.
- The Microsoft SQL client tools must be installed on each client computer that will have Dentrix Enterprise installed, including Terminal Servers and Citrix Servers.
- You must have Administrator rights on the local computer or domain to install Dentrix Enterprise. Also, all users must have at least Power User rights to use Dentrix Enterprise.
- If the computer has never had Dentrix Enterprise installed on it, after you install the program while logged in to Windows as the Administrator, copy the following registry key (and subkeys) to all other Windows users' accounts: **HKEY_CURRENT_USER/Software/Dentrix Dental Systems, Inc.** The same holds true if you are installing Dentrix Enterprise for a new Windows user on a computer that already has Dentrix Enterprise installed.
- For a first time installation of Dentrix Enterprise, on the file server, all Windows users on the local computer or domain must be given full access (read and write) to the shared folder that will contain the files. Also, on each computer that will have Dentrix Enterprise installed, map a network drive to that shared location. For more information about having a shared folder, see step 6, of "Installing Dentrix Enterprise" on page 3 and "Setting up a Share on the File Server" on page 11.
- If you have an HL7 interface, refer to the HL7 maintenance document for interface information.

Note: You can obtain a copy of the Setup file that will install Dentrix Enterprise by calling a technical support representative at 1-800-372-4346. The representative will assist you with downloading the file from a secure FTP site.

Installing Dentrix Enterprise

Install Dentrix Enterprise on all fat clients on the network. For special considerations about installing on a Citrix or terminal server, see "Installing on Citrix and Terminal Servers" on page 13. For instructions on how to upgrade Dentrix Enterprise from a previous version, see "Upgrading Dentrix Enterprise" on page 9.
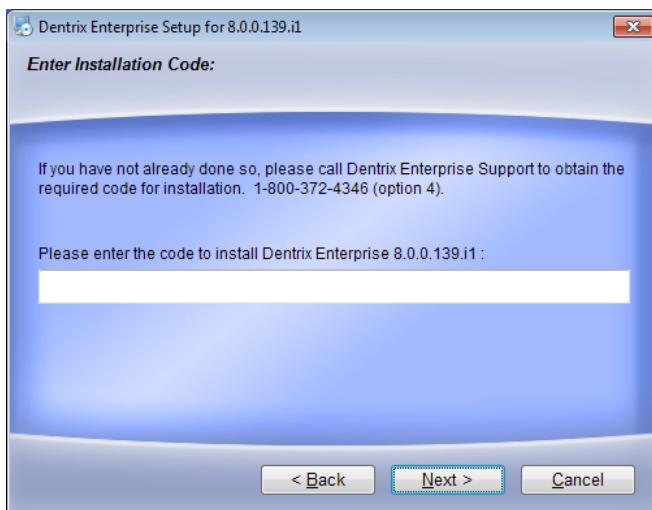
To install Dentrix Enterprise

1. To start the installation, double-click the Setup file (**Setup_DE_8.xxx.exe**; where "xxx" represents the revision numbers).

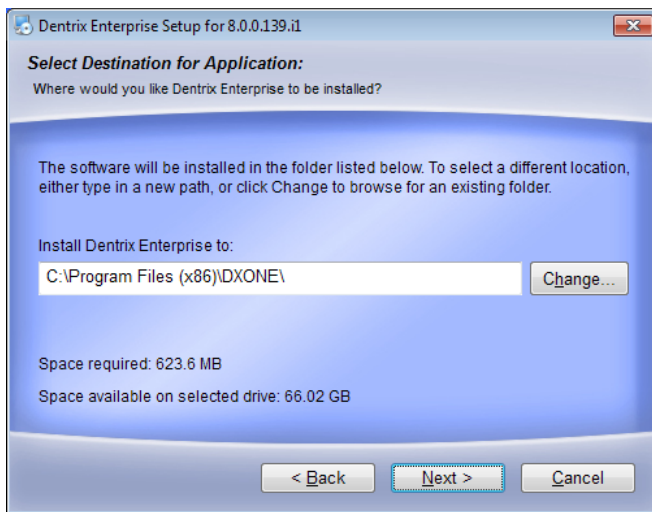   The **Welcome** screen appears.

2. Click **Next** to proceed.

   The **Enter Installation Code** screen appears.

3. In the field provided, type the pass code you received from Dentrix Enterprise Customer Support at 1-800-372-4346, and then click **Next**.

    The **Select Destination for Application** screen appears.

4. Verify that the default location for the program files (**C:\Program Files(x86)\DXONE**) is correct. If you need change the location where the files are to be installed, click **Browse** to select the appropriate path.

5. Click **Next** to proceed.

    The **Select Destination for Writable Folders** screen appears.
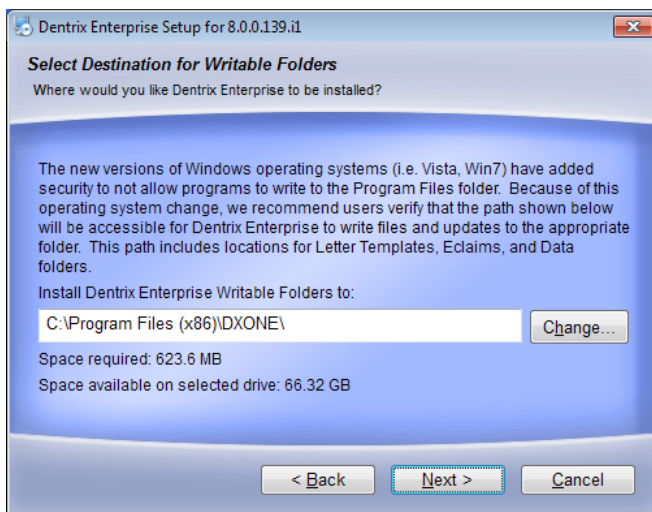

6. Verify that the default location for the writable folder is correct (**C:\Program Files(x86)\DXONE**) is correct. If you need to change the location, click **Browse** to select a different folder.

    Important:

    -   The newer versions of the Windows operating system (Vista, 7, and 8) do not allow programs to make changes to files in the "Program Files" or Program Files(x86)" folder. So if you are installing Dentrix Enterprise on a computer with either of these operating systems, it is recommended that you choose a folder that allows access for writing and updating files. The selected file path will be used for the "Docs," "Eclaims," and "Data" folders.

    -   All Windows users on the computer must have full access (read and write) to the "DXONE" folder or whichever folder you select. If this folders have not already been shared with the required permissions, you can do it after installing Dentrix Enterprise for the Administrator account in Windows. For more details about setting up a share, see "Setting up a Share on the File Server" on page 11.

7. Click **Next** to proceed.

    The **Select Destination for Document Center Images Folder** screen appears.
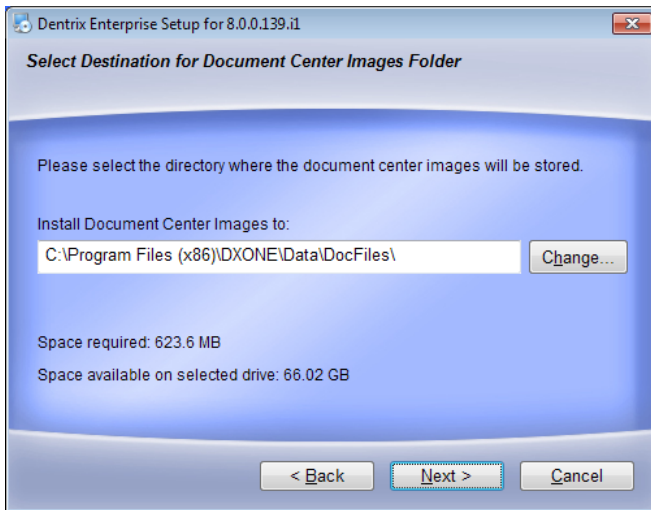
8. Verify that to path to where you store your Document Center files is correct. If you need to change the location, click **Change** to select the appropriate shared folder on the network where all users have read and write rights (for example, **M:\ Doc_Center**).

9. Click **Next** to proceed.

   The **Default Logon Clinic ID** screen appears.
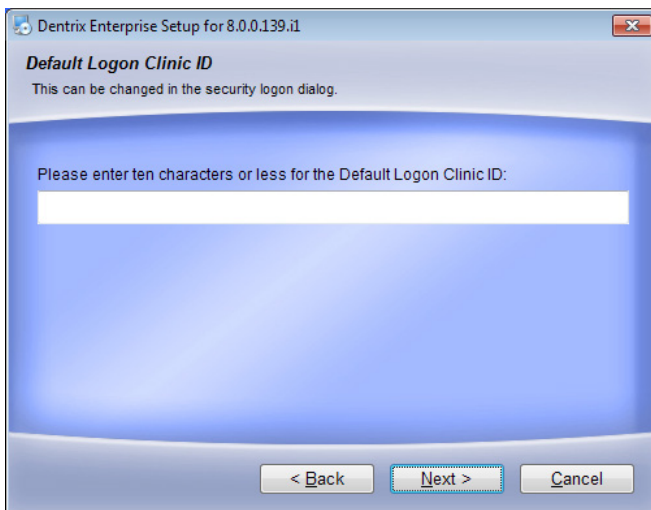
10. In the field provided, type the clinic that will be primarily accessed when logging in to Dentrix Enterprise (for example, Central or Clinic1). If you are unsure of the clinic name, type Central.

    Note: You can change the default clinic at any time after the installation.

11. Click **Next** to proceed.

    The **Enter Custom Code** screen appears.
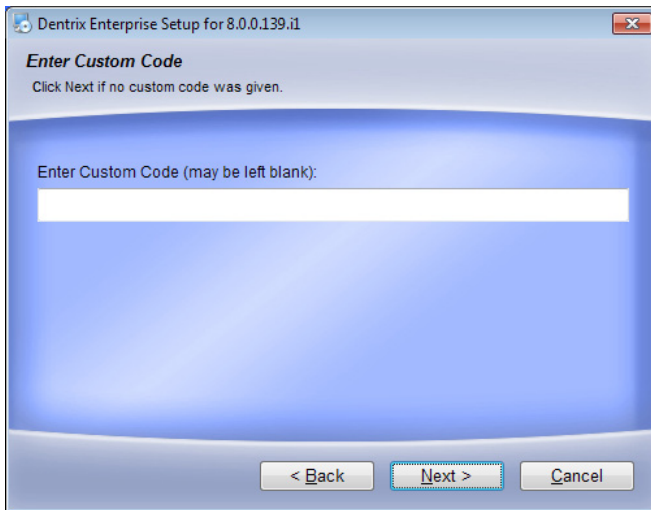
12. If any custom reports or interfaces have been specifically designed for your site by Dentrix Enterprise, type the custom codes in the field provided. These custom report codes are provided to you with the installation package. If a custom code was not provided to you, skip this step.

Note: An installation engineer or support technician may input information in this field to update the database. It is only necessary to enter a custom code during the installation on one computer, and that is usually the database server.

13. Click **Next** to proceed.

The **Shortcut Folder** screen appears.
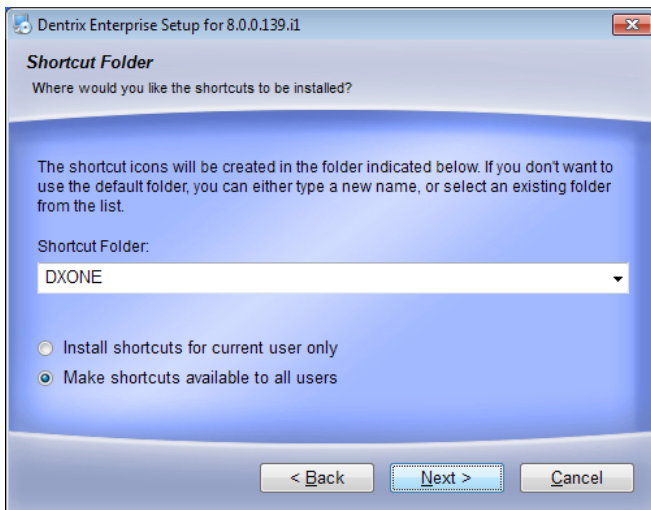
14. Leave "DXONE" entered in the **Shortcut Folder** field, or type a new folder name. This name will appear on the Windows **Start** menu. Also, select whether you want the Dentrix Enterprise shortcuts to be available only to the Windows user account that you are currently logged on to or to all Windows users (this is the default).

15. Click **Next** to proceed.

The **Ready to Install** screen appears.
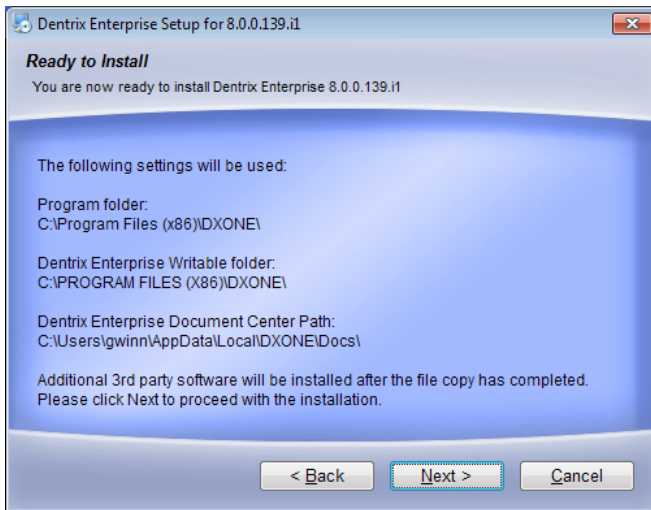
16. Verify that the folder locations are correct, and then click **Next** to proceed.

The **Installing Dentrix Enterprise** screen appears with a progress indicator.
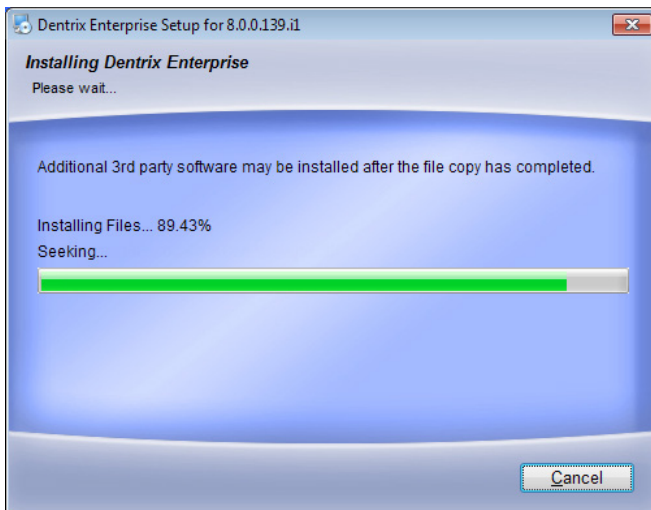
Note: Progress indicators for third-party application installations may appear as well.

Next, the **Run Reporting Scripts** screen appears if you entered a code in step 11. If a connection to the database is not required or you entered an invalid custom code, this screen will not appear; skip to step 23.
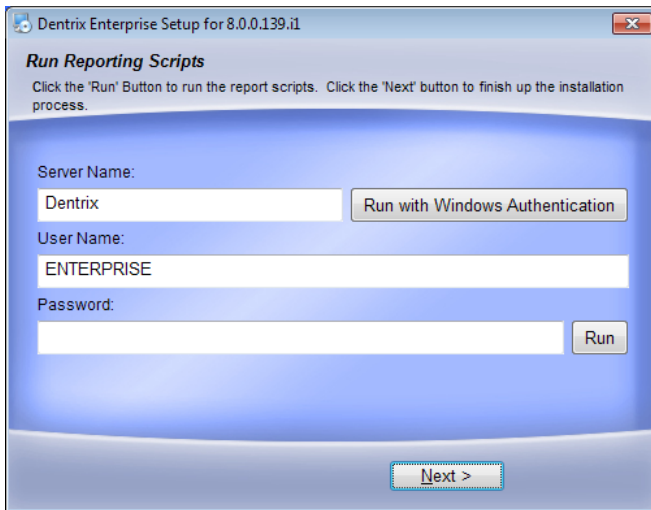
17. Verify that the **User Name** and **Server Name** that you want to use to run the reporting scripts (using the custom code from step 11) are correct, or change them appropriately.

18. Do one of the following:

   • Type the correct **Password**, and then click **Run** to run the scripts.

   • Click **Run with Windows Authentication**.

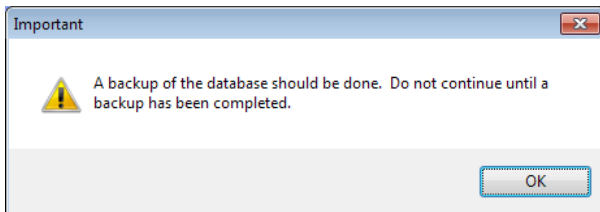19. Read the text of the confirmation message that appears and reminds you to back up your database before proceeding. After you have verified that you have a current backup, click **OK**.
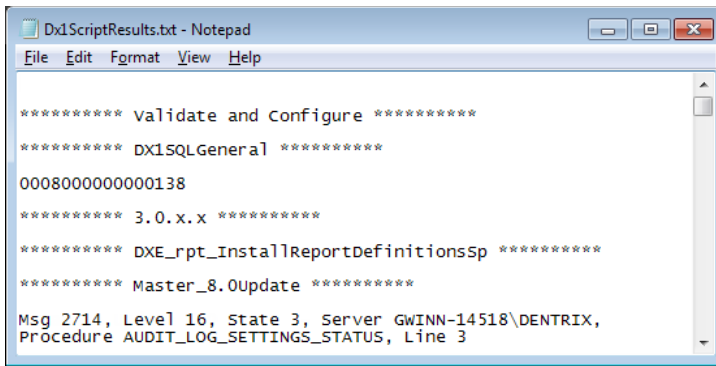
20. Read the text of the confirmation message that appears and reminds you to review the log file that appears after the database update process, click **OK**.
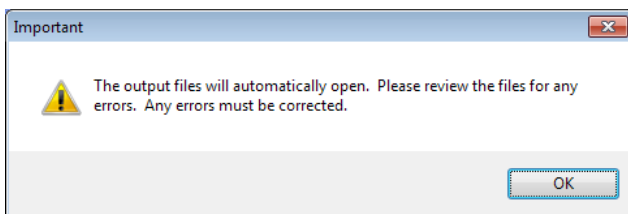
The **Run Scripts** dialog box appears with a progress indicator.
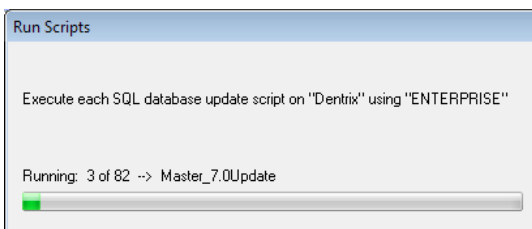
A text document appears.
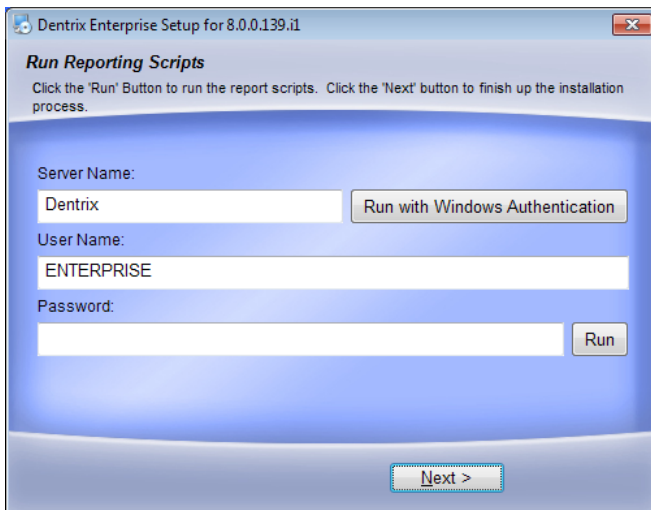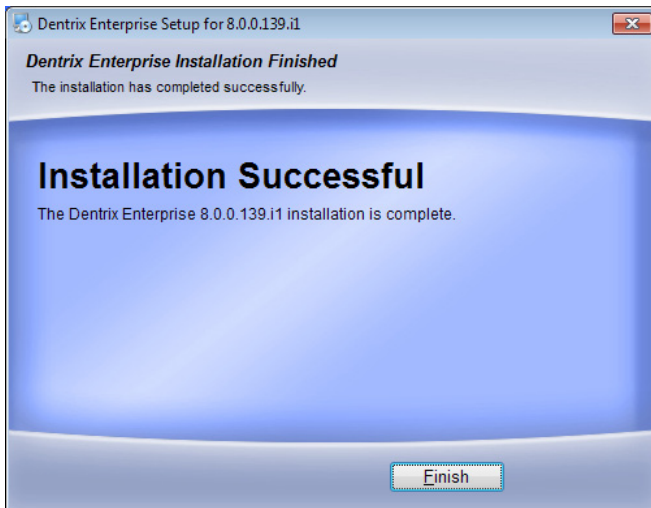
21. Check the log for any errors. If the log indicates that the script ran successfully, close the document. If there are any errors, contact Dentrix Enterprise Customer Support at 1-800-372-4346 to resolve the errors before continuing with the installation.

22. On the **Run Reporting Scripts** screen, click **Next** to proceed.

When the installation is complete, the **Dentrix Enterprise Installation Finished** screen appears.

23. Click **Finish** to exit the installation.

Upgrading Dentrix Enterprise

Upgrade Dentrix Enterprise on all fat clients on the network.

To upgrade Dentrix Enterprise

1. Upgrade Dentrix Enterprise on the first computer (this might be the database server) as explained in "Installing Dentrix Enterprise" on page 2.

2. Upgrade Dentrix Enterprise on the other computers, skipping steps 11 and 17 – 23, as explained in "Installing Dentrix Enterprise" on page 2.

Note: The steps for an upgrade will vary from the full installation process explained previously depending on the options that you select and the Dentrix Enterprise components that the Setup detects, if any, on the computer.

Running an Unattended Installation or Upgrade

You can install Dentrix Enterprise in an "unattended" mode except when the installation needs to update the SQL database. The reason for the exception is that, if you were allowed to update the database with an unattended installation, security would be compromised by having to store a user name and password in an .ini file.

Note: Since the Microsoft Word Letter Merge add-in requires manual interaction, it is not installed when you run the Dentrix Enterprise in unattended mode, but you can install the add-in manually from the **C:\Program Files (x86)\DXONE\3rd Party Installs\LMAddin** folder (this is the default location but may be different on your computer) after you finish the installation of Dentrix Enterprise.

To run the unattended installation or update

1. From a batch command line or Windows shortcut add the update/installation file name and the `/S` switch (the switch to run the installation in silent/unattended mode).

   Example: `Setup_DE_8.0.01.112.i1 /S`
   (You must include a space before the slash.)

2. Optionally, add the location of the .ini file that contains the required setup information. The need for an .ini file is determined by the following:

   • If you are installing Dentrix Enterprise 8.0.5 for the first time for the current Windows user, the `/S` switch requires the .ini file path.

      Example: `Setup_DE_8.0.01.112.i1 "/S:C:\temp\DEInstallOptions.ini"`
      (You must include a space after the update/installation file name, enclose the switch and file path in quotation marks, and put a colon before the .ini file path.)

   • If Dentrix Enterprise 8.0.5 has already been installed for the current Windows user, but you want to reinstall it with different settings, make the necessary changes to the .ini file (see Tip below "INI File Contents" table), and add the .ini file path to the `/S` switch (as shown above).

   • If Dentrix Enterprise 8.0.5 has already been installed for the current Windows user, but the last installation did not update the database, the `/S` switch does not require an .ini file because the settings from the previous installation will be used.

      Example: `Setup_DE_8.0.01.112.i1 /S`

The .ini file must contain the lines of text that are explained in the following table:

INI File Contents

[SetupValues]	This is the header.
%InstallationCode%=8.0INSTALL	This is the code to unlock the installation.
%DefaultClinicID%=CENTRAL	Type the default clinic for logging in to Dentrix Enterprise. If you do not want to specify the default clinic, leave the line blank after the equals sign (=).
%CustomCode%=#CODE#CODE#	Type your custom codes; If you do not have or do not want to specify any custom codes, leave the line blank after the equals sign (=). If you enter codes, hash symbols are required at the beginning and end and between individual codes.
%AppFolder%=C:\DXONE	Type the full path to the Dentrix Enterprise program files.
%Path%=C:\ReadWrite	Type the full path to the writeable folder for certain Dentrix Enterprise files.
%DocCtrPath%=C:\DocFiles	Type the full path to the folder that contains the Document Center documents for patients.

> **Tip**: If you are reinstalling Dentrix Enterprise and want to use different settings than those that were used for the previous installation, add `Force_` before each key name that you want to override except for `InstallationCode` (for example, `%Force_CustomCode%=#NEWCODE#`).

The status of an installation that is running in unattended mode may be difficult to determine, but you might notice any of the following during the installation:

- Only a few flashes of dialog boxes opening and closing for some of the 3rd-party installations may be visible.
- On the Windows task bar and in the Task Manager, the program "Dentrix Enterprise Setup" is visible.
- In the Task Manager, the process "irsetup.exe" is visible.

When the unattended installation starts, the "success" and "error" text files are deleted. When the installation is complete, one of the files is re-created, depending on whether the installation succeeded or failed:

- **%temp%\Dentrix Enterprise Install Success.txt** – The installation succeeded.
- **%temp%\Dentrix Enterprise Install Error.txt** – The installation failed. The following error messages in this file are possible:
  - **Invalid 'InstallationCode'** – The required installation code information was not found for this Windows user. You can specify this setting in the .ini file using `%InstallationCode%`. It is also stored when a manual non-database installation is done. (An installation that updates the database removes this stored entry.)
  - **Invalid 'CustomCode' (includes the text #RUNSCRIPTS#)** – Any unattended install that includes the Custom Code of #RUNSCRIPTS# will fail because database updates are not allowed.
  - **Invalid DBMS registry entry** – Only the value of "MSSQL" is valid for this registry entry: **HKLM\Dentrix Dental Systems, Inc.\Enterprise Dentrix\Setup\DBMS**.
  - **Invalid 'AppFolder'** – The required application folder information was not found for this Windows user. You can specify this setting in the .ini file using `%AppFolder%`. It is also stored when a manual installation is done.
  - **Invalid 'Path'** – The required read-write folder information was not found for this Windows user. You can specify this setting in the .ini file using `%Path%`. It is also stored when a manual installation is done.

- **Invalid 'DocCtrPath'** – The required Document Center folder information was not found for this Windows user. You can specify this setting in the .ini file using `%DocCtrPath%`. It is also stored when a manual installation is done.

- **Invalid Install Prerequisite -- Microsoft .NET 4.0 must be installed before Dentrix Enterprise can be installed** – The required MS DOT NET 4.0 prerequisite was not found on this computer. Running the Dentrix Enterprise installation once manually will prompt you to run the .NET installation. (Alternatively, you can download the .NET installation from the Microsoft website, and install it prior to running the Dentrix Enterprise installation.)

Setting up a Share on the File Server

For Dentrix Enterprise, there is a set of folders on the file server that contain common files that can be used by various features of the program. On the file server, you need a shared, writable folder where the Dentrix Enterprise installer can put a Data, a Docs, and and an Eclaims (if applicable) folder. For more information about the writable folder, see step 8 of "Installing Dentrix Enterprise" on page 2. Give all users on all workstations read and write access to the shared, writable folder. Also, on all workstations, map a network drive to the shared, writable folder, using the same letter for the drive on all those computers.

Important: UNC paths are <u>not</u> recommended for linking workstations to shared directories for Dentrix Enterprise. Use mapped network drives.

Configuring Client Network Connectivity

The Microsoft SQL Server client utilities must be installed for the Dentrix Enterprise to function properly. After you install Dentrix Enterprise, you must configure the client network utility. The instructions to configure this utility vary depending on the version of Microsoft SQL Server you have installed.

Important: It is highly recommended that you install the Microsoft SQL Client Connectivity tools on not only the database server but on every computer that has Dentrix Enterprise installed (including Terminal Services and Citrix servers).

To configure the client network utility for Microsoft SQL Server 2005/2008

1. From the Windows Start menu, point to **Programs** > **Microsoft SQL Server 2005/2008**, and then click **SQL Server Configuration Manager**.
2. From the **Action** menu, click **New Alias**.
3. Depending on your network setup, change Protocol to **TCP/IP** or **Named Pipes** for the **Network Libraries**.
4. In the **Server Alias** field, type `Dentrix`.
6. Type the name ("name\instance") of your database server.
7. Click **OK**.
8. From the **File** menu, click **Exit** to exit the Microsoft SQL Server Configuration Manager.

Setting up the ODBC

If you use the HL7 interface to connect your medical software to Dentrix Enterprise, this feature may require that an SQL link be set up in the ODBC.

Note: The HL7 interface may be the only feature of Dentrix Enteprise that needs this SQL link.
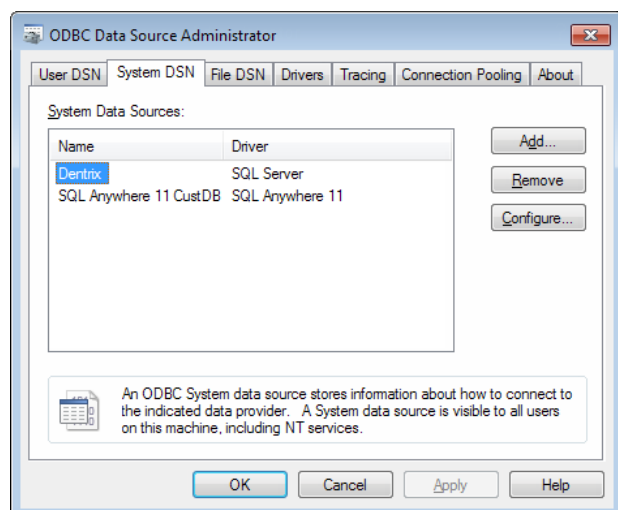
To add an SQL link

1. From the Windows **Start** menu, click **Control Panel**.
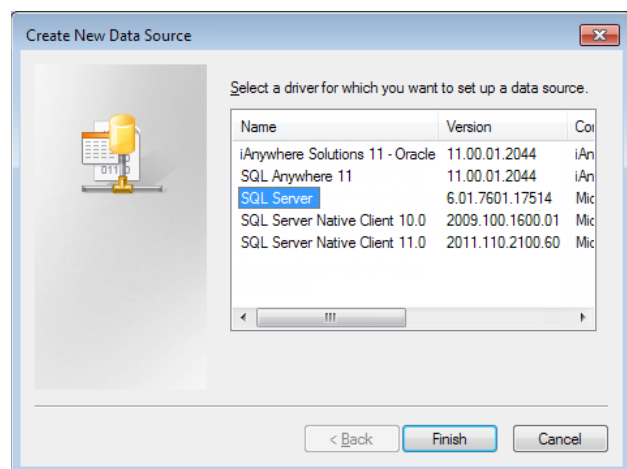
   The **Control Panel** window appears.

2. Double-click **Administrative Tools** and then **Data Sources (ODBC)**.

   The **ODBC Data Source Administrator** dialog box appears.

3. Click the **System DSN** tab, and then click **Add**.

   The **Create New Data Source** dialog box appears.

4. Select "SQL Server," and then click **Finish**.

   The Create a New Data Source to SQL Server Wizard starts.

5. Type a **Name**, and select the **Server** for the database. Then, click **Next**.

6. Select how you want the SQL server to be authenticated. Depending on the selected option, you may have to type the **Login ID** and **Password** to the Dentrix database of your Microsoft SQL Server instance. Then, click **Next**, **Next**, and then **Finish**.

7. Click **OK** and then **OK**.

Installing on Citrix and Terminal Servers

Use a terminal server or Citrix Server as the application server if you have users accessing the application remotely from a very wide geographic area, if the connection is slow, or if you want to take advantage of the central administration offered by Terminal Services or Citrix and thin clients. A thin client is a computer without Dentrix Enterprise installed, from which you remotely connect to a terminal server to use Dentrix.

Tips:

• Install Dentrix Enterprise on computers from which you need to acquire images through imaging devices (this will not work with thin clients). A computer with Dentrix Enterprise installed is called a fat client.

• If thin clients are used, set up two different terminal or Citrix servers: a test server and at least one production server.
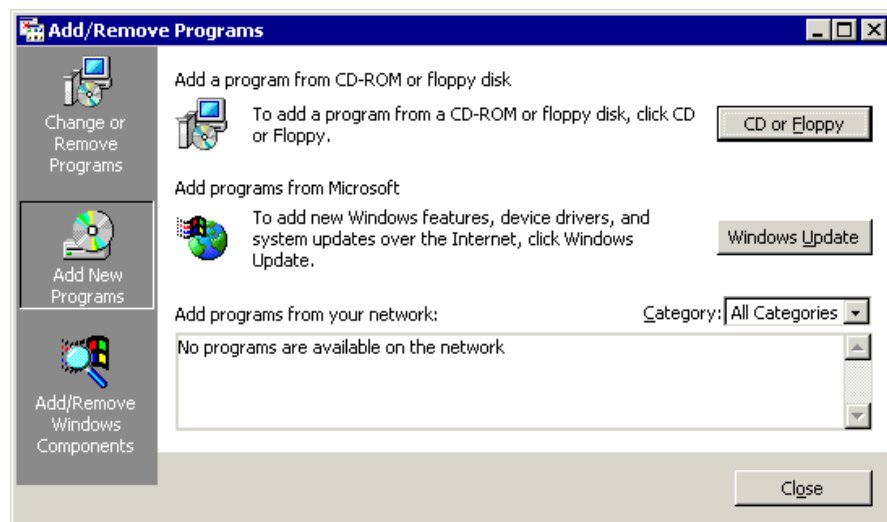
To install Dentrix Enterprise on a Citrix or terminal server

1. From the Windows **Start** menu, click **Control Panel**.

   The **Control Panel** window appears.

2. Double click **Add or Remove Programs**.

   The **Add/Remove Programs** dialog box appears.

3. Install the program.

4. If the Dentrix Enterprise program is accessed through a published application, when setting up the published application, change the "run in" folder (working directory) to "%temp%":

   a. In the Citrix Management Console window, right-click the published application, and then click **Properties**.
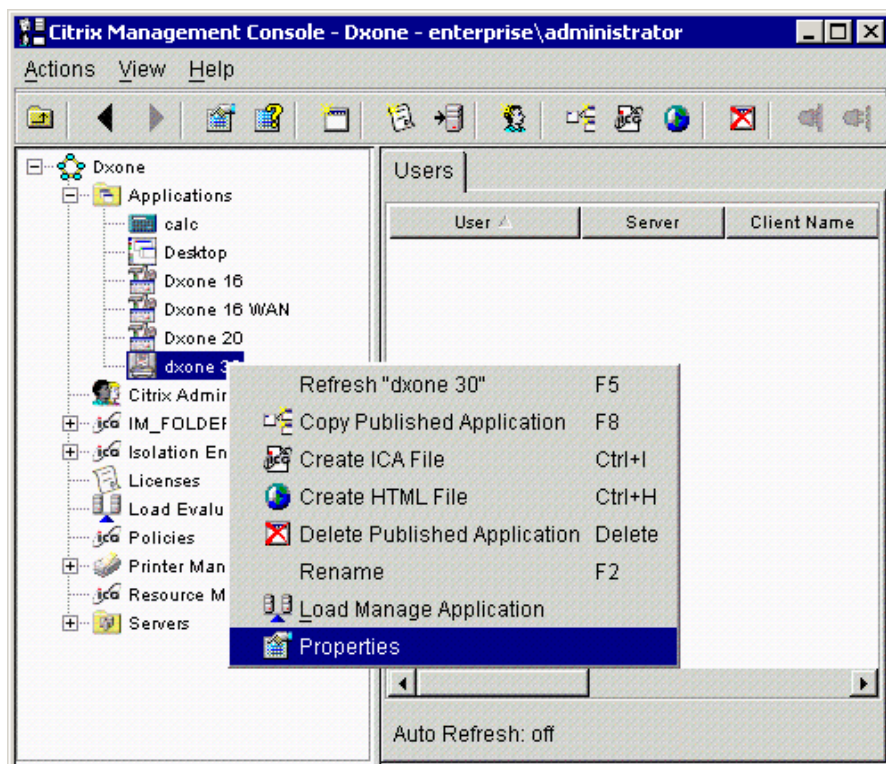
The **Properties** dialog box appears.
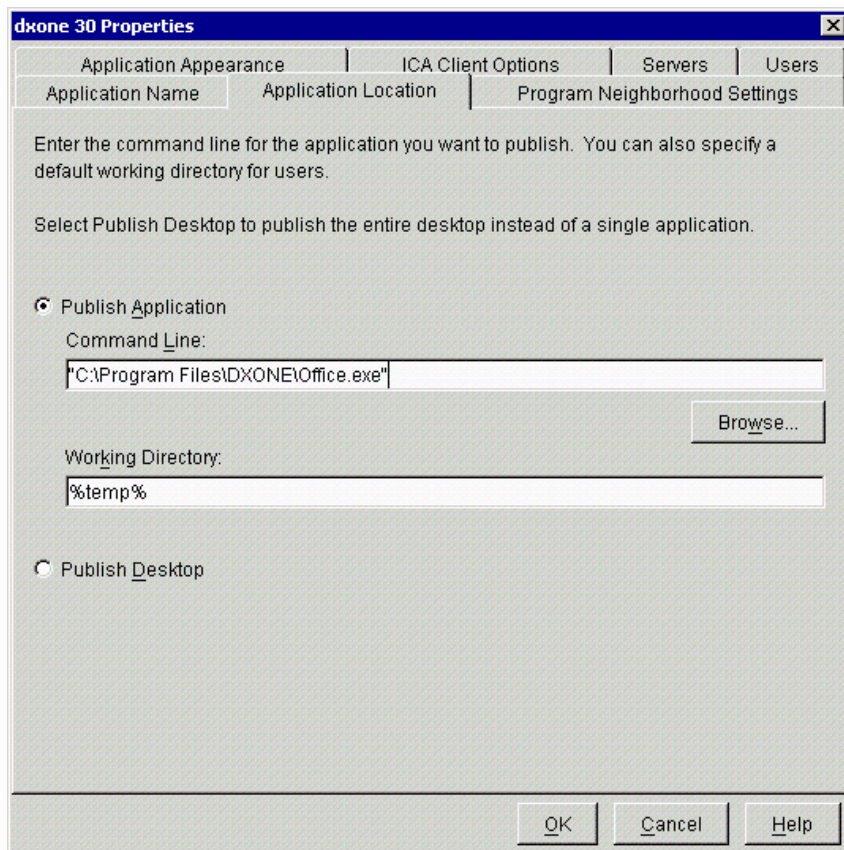
   b. On the **Application Location** tab, change the **Working Directory** to "%temp%", and then click **OK**.

   c. In the **Citrix Management Console** window, right-click the published application, and then click **Create ICA File**.
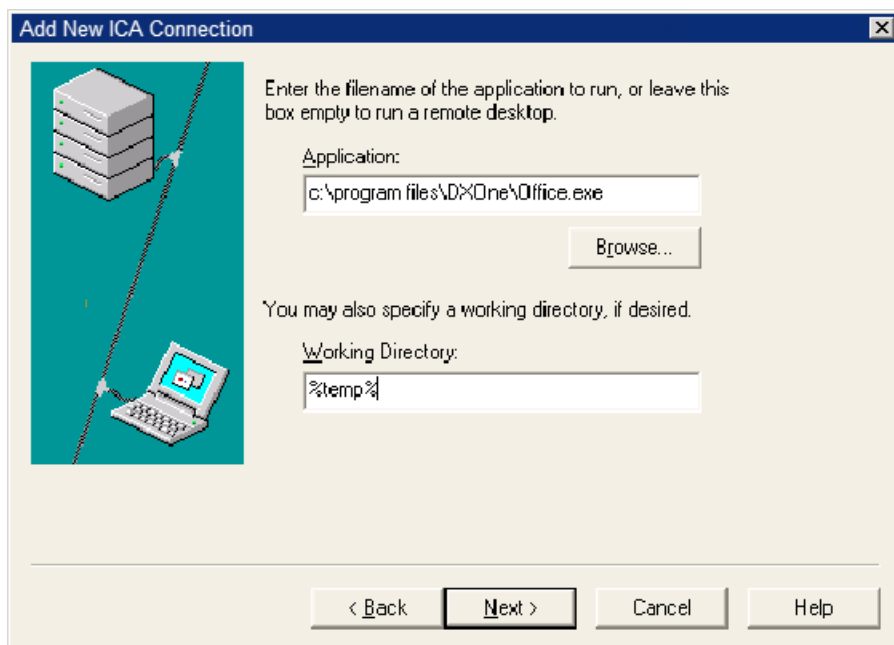
While adding the new Citrix ICA connection, enter the path to office.exe in the **Application** field, and type "%temp%" in the **Working Directory** field.

Tips:

- If a batch file is used to set up a user environment before calling the Dentrix Enterprise program, make sure the batch file calls a shortcut of those programs. Set the "Start in" property for the shortcut to "%temp%".

- If multiple application servers, such as multiple terminal servers in a group or multiple Citrix Servers in a Citrix Farm, use a terminal server profile or a roaming profile for each user (so that a user's settings can be saved and accessed from any terminal or Citrix server), use terminal server profiles instead of roaming profiles.

- Install all printer drivers from local client machines on the Citrix or terminal server through the printer setup process (instead of using the Citrix's auto-map feature). In this way, all users can select or set up static printers for their own profile.