DENTRIX®

G5

Installation Guide

Publication Date: January 2012

Installation Guide

Table of Contents

Introduction

Thousands of dental practices use Dentrix to run their dental practice. Dentrix boosts staff productivity, enhances professionalism, helps keep chairs full, increases collections, and improves the bottom line. And, with its extensive suite of eServices products and third-party partnerships, Dentrix provides many profitable integration solutions.

This Installation Guide will help you install and register your Dentrix G5 software.

Before Installing Dentrix

Before installing and using Dentrix, you should be familiar with using the computer. The Dentrix documentation is written with the assumption that you are familiar with using a PC and Microsoft Windows.

Microsoft Windows must be installed before you can install Dentrix. For information on supported Windows versions, read the Dentrix G5 System Requirements included in the box with your software and available online at www.dentrix.com. For information about installing and using Windows, refer to the Windows documentation.

How To Get Help

Henry Schein recommends that dental offices contact Henry Schein TechCentral (1-877-483-0382) or another qualified integration specialist for new installation or upgrade assistance.

You can find answers to many questions about Dentrix in the *Dentrix G5 User's Guide* (available on Windows desktop after installing Dentrix and in the Dentrix Resource Center at www.dentrix.com/resource-center), or in the Dentrix Help, which you can access from the Help menu of each Dentrix module. You can find additional information, including on-demand tutorials, at www.dentrix.com/resource-center.

If you are on a current Dentrix Customer Service Plan, you can access the Dentrix technical support knowledgebase at www.dentrix.com/resource-center for answers to common questions.

If these methods do not provide an answer, contact Dentrix Customer Support at 1-800-DENTRIX. Toll-free telephone support is available only to registered Dentrix users on a current Dentrix Customer Service Plan. Registered users not on a current support plan will be charged for telephone support. (For current pricing information, visit www.dentrix.com/support/contact-us.aspx.)

Support is limited to the current version of the software and one prior release. When calling customer support, be near a computer running the Dentrix software. Be prepared to give the following information:

- Your name and the name of the practice

- The Dentrix customer number assigned to the practice

- The version number of the product being used

- The type of network being used, if any

- The version of Windows installed on the computer

- The exact wording of any messages that have appeared on the screen

- The circumstances surrounding the question or problem

- Steps that have been taken to reach a solution

Installing Dentrix G5 From a DVD

In an effort to provide you with current technology solutions, the Dentrix G5 installation program is on one DVD. Most modern computers have DVD readers installed. If your computers meet the Dentrix G5 system requirements, installing Dentrix G5 from DVD will not be a problem for your office. If you have any questions about installing from DVD or want to make sure your hardware is ready for Dentrix DVD installation, please contact your hardware technician or call Dentrix Customer Support at 1-800-DENTRIX.

New Features

Some of the new features available in Dentrix G5 are briefly described in this section. For additional information about these features and other changes in Dentrix G5, refer to "What's new in Dentrix G5?" in the Dentrix Help, and the Dentrix G5 Release Guide in the Documentation folder of the Dentrix G5 DVD and in the Dentrix Resource Center.

Ledger

- You can now receive and post electronic insurance payment information to the Dentrix database using an electronic Explanation of Benefits (eEOB) or Electronic Remittance Advice (ERA). The **Batch Insurance Payment Entry** dialog box has been modified so you can easily enter check insurance payments and review, edit, and post electronic insurance payments from the same location. The new **Batch Insurance Payment Entry** dialog box makes it easy to view all outstanding claims in the Ledger for a particular family. When you receive electronic EOBs (eEOBs) via eServices, Dentrix saves a copy of the EOB to the Document Center and automatically attaches it to each each patient and insurance plan on the eEOB.

- Dentrix now notifies you when an attachment is missing from an insurance claim. Those who use eClaims will be notified when they submit a claim if the payor requires a claim attachment for specific procedures and the attachment is missing. This will help reduce the number of claims that are rejected.

- A new screen capture feature lets you select an area of the screen, capture it, and automatically attach the image to an insurance claim and save the image in the Document Center.

Office Manager

- Monitoring when someone previews or prints Day Sheet and Audit Trail reports is easier now. Each type of report has its own record in the Dentrix database and its own series of sequential audit numbers so that you can track each report type individually. Dentrix stores the last audit number used for each report and increments it the next time someone previews or prints a report. The audit number prints in the lower left corner of each report. Each time someone previews or prints a report the audit trail entry now includes the type of report, the audit number, and the date and time stamps of the report. If you have enabled passwords, the audit trail also includes the user name. Knowing who previewed or printed what type of

report and when can make it easier for you to identify possible instances of fraud in your office.

- Switching in and out of the Tutor database is much easier than before. After you switch out of the Tutor database, Dentrix automatically reconnects to your practice's live database.

- For insurance payments made for multiple patients or more than one patient in a family, you can list each patient and the amount paid per patient below the check that appears on the Deposit Slip Report and the Daily Collections Report.

Patient Chart

- The Patient Chart has an enhanced "Refresh" feature that reloads any changes made to setup configurations when you click **File > Refresh**, such as added/edited procedure codes, multi-codes, provider information, medical cross-coding, clinical note templates, and so forth.

Miscellaneous

- The Dentalink intra-office communicator lets you receive and send messages instantly to other computers in your office. When someone sends you a message, a message bubble appears, and you can then reply to the message. Your sent and received messages are recorded automatically in a conversation log. Information on using Dentalink, eSync, and other eSync plug-ins is available in the Dentrix Help after you install eSync. For more information about eSync, visit www.dentrix.com/products/eservices/esync/g5-esync-download.aspx

- Dentrix G5 now uses a true client-server database architecture. This architecture adds additional stability and efficiency to the software because the server rather than the workstations now performs the work of retrieving and writing data to and from the database.

- The **Select Patient** dialog box introduced in Dentrix G2 is now the default method for selecting patients in all modules for new Dentrix installations.

Tips for a Successful Installation

For a successful installation, read the following information before installing Dentrix. Call 1-800-DENTRIX or send an e-mail message to support@dentrix.com for any questions related to these installation tips.

1   **Meet the System Requirements:** Make sure the server and workstations on your network meet the current system requirements before you upgrade to or install Dentrix G5. The current Dentrix G5 System Requirements are included in the box with your Dentrix software and are available online at www.dentrix.com.

2   **Back Up Your Data:** Create a backup of the server's hard drive. If you are upgrading, back up the server's Dentrix directory and all subdirectories. If any Dentrix data is stored elsewhere on the system, back up that directory as well. Verify the integrity of all backups to be sure you have a good backup before upgrading from a previous version of Dentrix. For more information, refer to the eBackUp 12.0 for Dentrix G4 Recommendations document in the Dentrix Resource Center at www.dentrix.com/resource-center.

3   **Check Available Disk Space:** From the Start menu, select **My Computer**. Right-click the C:\ drive icon and select **Properties**. The **Local Disk Properties** dialog box appears, and the **General** tab displays the used and free disk space. Refer to the Dentrix G5 System Requirements for the required free hard disk space for servers and workstations. The current Dentrix G5 System Requirements are included in the box with your Dentrix software and are available online at www.dentrix.com.

Note: If you use imaging software and/or the Document Center, you must dedicate an additional 30-40 GB of hard drive space in addition to what is needed for the G5 Server installation.

4   **Prepare for Server and Workstation Installation:** Find the Serial Number/Activation Code card inside the Dentrix G5 software box. These numbers will be needed during the installation. You can find these numbers in the box with your Dentrix software. If you are upgrading, check the Batch Processor for reports. Print the reports and clear the Batch Processor. Send all unsent electronic claims.

Note: The Dentrix G5 installation/upgrade process could clear any reports in the Batch Processor and delete any unsent electronic claims.

5   **For Upgrades, Verify the Correct Version is Currently Installed:** Dentrix G4 or higher must be installed before you can upgrade the program to Dentrix G5. To determine which version of Dentrix is installed, in the Office Manager, from the **Help** menu, click **About Office Manager**. If the version is older than Dentrix G4, all product upgrades must be installed to bring the version to Dentrix G4. For example, if Dentrix 11.0 is currently installed, you must upgrade to version G4 before installing Dentrix G5.

6   **Exit Dentrix at Each Workstation and Close Other Programs:** Before installing Dentrix, close any Dentrix modules and any other programs on the Dentrix server and all workstations. To avoid conflicts and allow access to all files and directories, you should disable any anti-virus and screensaver software and then re-enable it after you have completed the Dentrix G5 installation. During server installation, it is best to shut down each workstation (to prevent others from starting Dentrix while it is being updated).

7   **Verify the Dentrix G5 DVD Configuration:** Verify that the Dentrix G5 Installation DVD is the right DVD for your office configuration. The available DVD versions are SINGLE USER, MULTI USER, MULTI USER OFFICE, and SINGLE USER OFFICE.

8   **Follow the Installation Instructions:** Make sure you follow all of the step-by-step instructions in the Dentrix G5 Installation Guide as you install Dentrix G5.

9   **Finish the Installation Completely:** Do not interrupt the installation process, even if it appears as though nothing is happening. You will be prompted when the installation is ready to continue. Terminating an installation prior to completion could affect the integrity of the database. Terminate the installation only if you are directed to do so by Dentrix Customer Support.

10   **Before installing Dentrix G5:** Be sure to check with the applicable application vendors to access these G5-compatible versions. To see a list of authorized vendors with applications designed to integrate with Dentrix G5, visit: www.Dentrix.com/integrated.

Installing Dentrix G5

Read the Tips for a Successful Installation before beginning the installation. If Dentrix is being installed on a networked system, the installation process must be completed on each workstation. Install Dentrix on the file server (the computer where the practice database will be stored) first.

1. Insert the Dentrix G5 DVD into the DVD drive. If the DVD drive is equipped with AutoStart technology, the Dentrix G5 installation Welcome screen will appear within a few seconds.
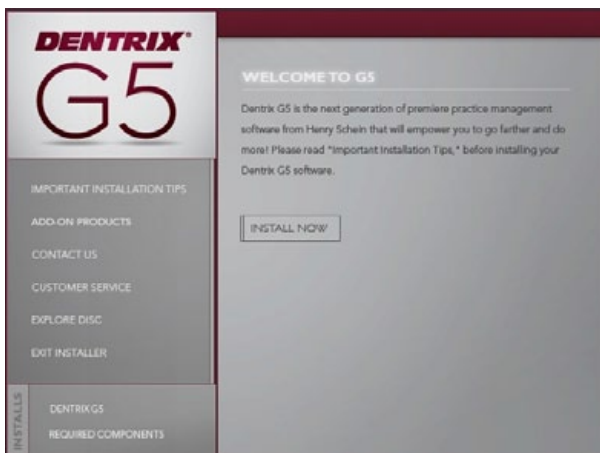
If the Dentrix G5 installation Welcome screen does not appear:

A. Click the Windows Start button and then click **Run**.

B. The **Run** dialog box appears.

C. In the **Open** field, type D:\DENTRIX_G5 (where D: is the drive letter for the DVD drive).

D. Click **OK** to begin the installation.

2. Click **INSTALL NOW** to begin the installation.

Dentrix performs a check of your system to verify that all required components (such as the required versions of Microsoft .NET Framework) are installed on your computer. After Dentrix has performed the check, Dentrix prompts you to install any required components that are not already installed.

Note: If the Microsoft .NET Framework 3.5.1 and 4.0 are not already installed on your computer, installing them will require several minutes. After they are installed, your computer will need to be rebooted.

    A. Click **INSTALL NOW**.

    B. When it is finished, click **Finish**.

3. At the Dentrix G5 screen, click **INSTALL NOW**.
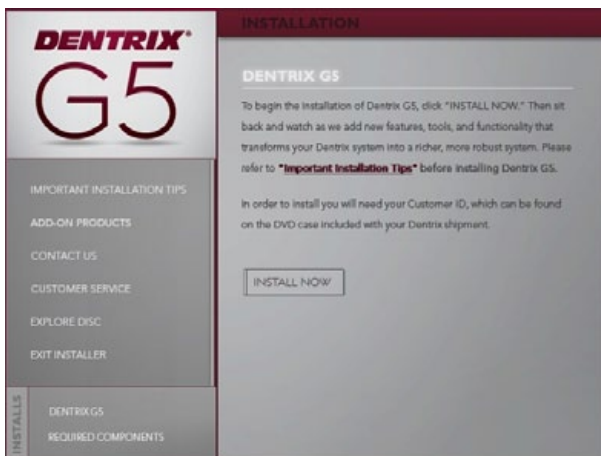
Dentrix installs several prerequisites, such as the Edidev runtime and Crystal Reports prerequisites, which are needed for Dentrix G5. This will probably take several minutes.

Please wait while setup installs the Edidev runtime prerequisite...

Please wait while setup installs the Crystal Reports prerequisite(s)...

The Dentrix installation then displays the Welcome screen.

4. After you have read the Tips for a successful installation, select **I have read and followed the tips for a successful installation** and click **Next** to continue.

Note: If you are upgrading from a previous version of Dentrix, you will be prompted again to back up your data before proceeding. If you have backed up your data, click Yes to continue with the installation.

The End User License Agreement screen appears.
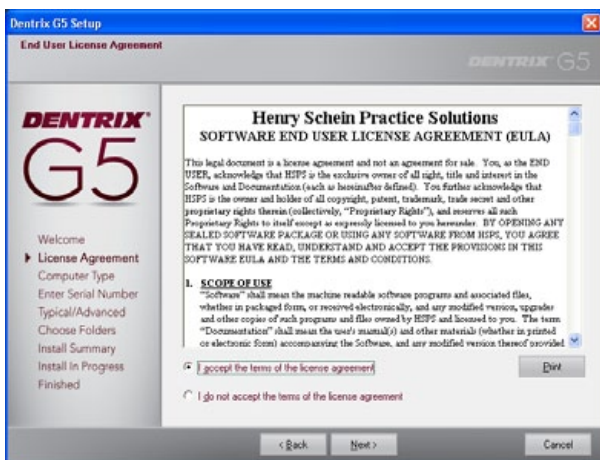
5. After you have read the Software End User License Agreement, select **I accept the terms of the license agreement** and click **Next** to continue.

The Select Installation Type screen appears.
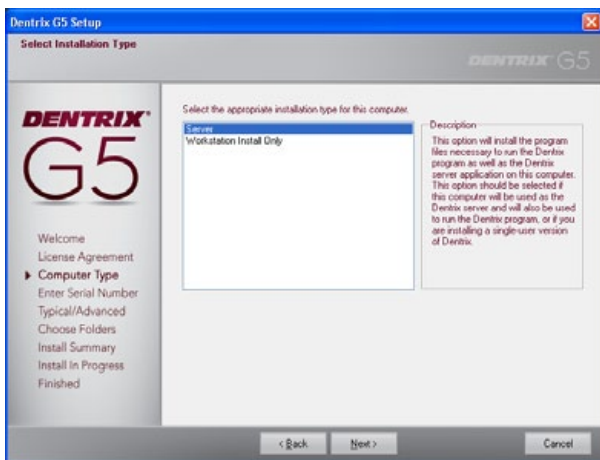
6. Select the type of installation you are performing:

- Server - Select this type of installation if you are installing on the computer that will act as the Dentrix server for all other computers on the network.

- Workstation Install Only - Select this type of installation if you are installing Dentrix G5 on a front office or clinical workstation over a network and have already run the server installation on another computer on the network.

7. Click **Next**.

If you selected the Server option, and the Dentrix installation detects other Dentrix database servers on your network, you will be prompted to either configure this computer as a workstation (recommended) or continue and configure this computer as a duplicate server.

If you selected the **Workstation Install Only** option, you will be shown a list of available Dentrix servers and prompted to select the server you want to connect to.
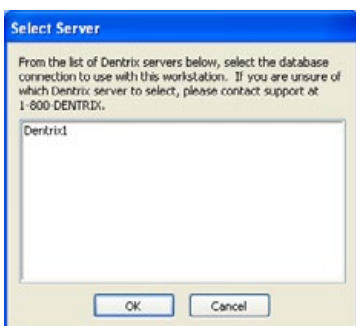

Select the server you want to connect to and click **OK**.

Dentrix runs a system requirements check. If your system meets the requirements, the installation continues to the next step. If it does not meet the requirements, the **Dentrix System Requirements Notice** dialog box displays what your system needs in order to meet the system requirements.
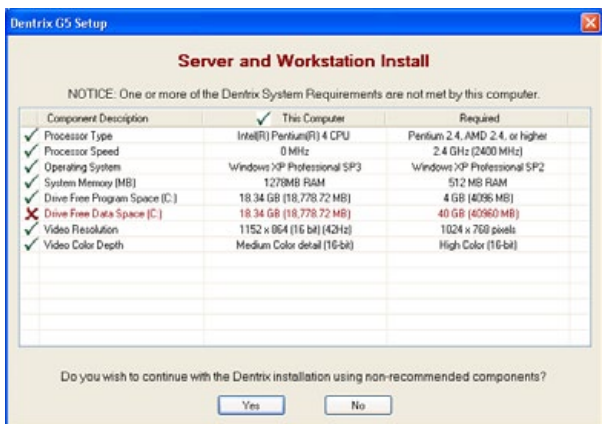
8. If the **System Requirements Notice** dialog box appears, verify the system requirements. A green check mark indicates that a component meets the requirements. A red "X" indicates that a component does not meet the requirements. To discontinue the installation and install the required components (recommended), click **No** to stop the installation. Click **Yes** to continue the installation without the recommended system requirements.

The User Name and Serial Number screen appears.
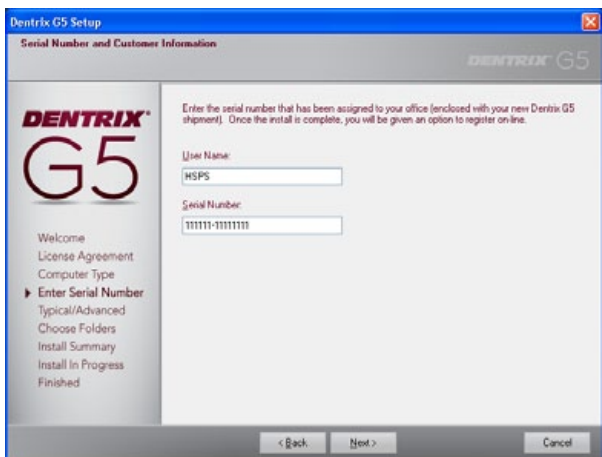
9. Enter your **User Name** and **Serial Number**. Your serial number is on the Serial Number/Activation Code card inside the Dentrix G5 software box.

If you are upgrading, the serial number you previously used to install Dentrix will automatically appear in the **Serial Number** field. It is very important to verify that the serial number in the field is the serial number that was assigned to your office when you originally purchased Dentrix. In some instances, the serial number shown may not be the one assigned to your office.

To verify that your serial number is correct, consult the card that was included in the box with your Dentrix software. Enter the serial number that was assigned to your office to continue with the installation.

IMPORTANT! You must enter the serial number that was assigned to your office in the Serial Number field in order for the registration/activation and Check for Updates features to function properly.

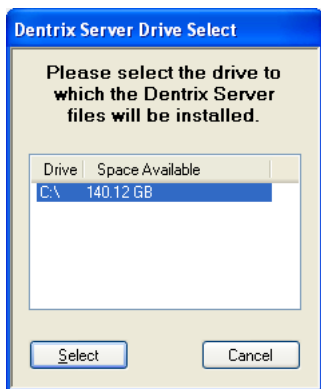10. Click **Next**.

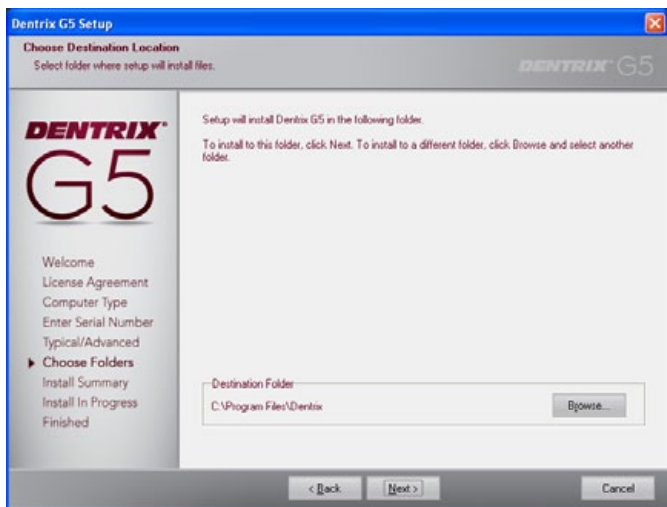The Select Installation Type screen appears.
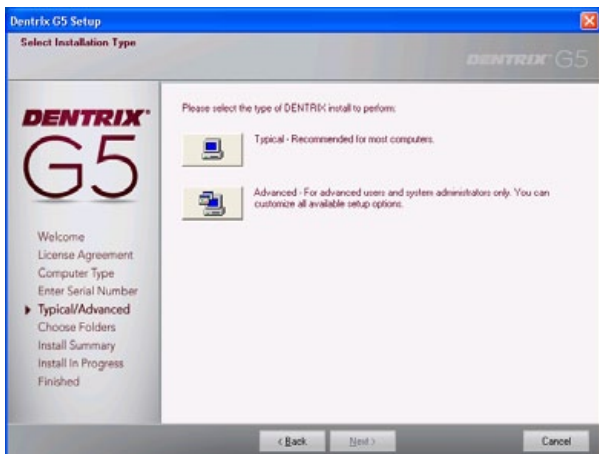
11. You can perform one of two installation types: **Typical** or **Advanced**. With a typical installation type (recommended for most computers), folders are placed in the default locations, and all of the default Dentrix G5 features are installed. With the advanced installation, you can specify the location of the Dentrix files.

If you select **Typical**, the Start Installation Screen appears. Proceed to step 12. If you select **Advanced**, the **Dentrix Server Drive Select** dialog box appears. Follow these substeps before proceeding to step 12.
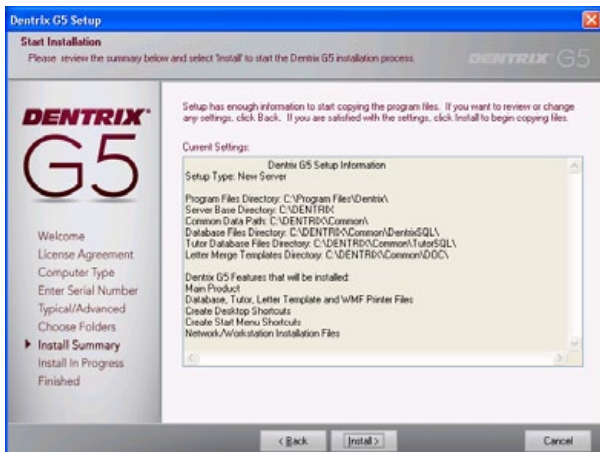

A. Select the drive where you want to install the Dentrix server files and click **Select**.

The Choose Destination Location screen appears.

B. To change the folder locations, click **Browse**, navigate to the desired location, and then click **Next**. If you want to use the default folder locations, click **Next**.

The Start Installation Screen Appears.

12. Review the settings that have been specified for your installation. If you want to make changes to any of the settings, click **Back** and change them. When the settings are correct, click **Install** to begin installing Dentrix G5.
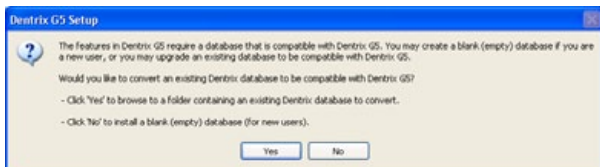
If you are performing a server installation, the **CDT 2011-2012 Procedure Code Update** dialog box appears.

13. Click **Update** if you want to update your CDT Procedure Codes, or click **Skip**.

If you chose **Update**, when the update is finished, click **Continue**.

A message box will ask if you want to convert an existing Dentrix database or install a blank (empty) database (for new users).

14. Click **Yes** if you want to convert an existing database, or **No** if you want to install a blank database.

If you are upgrading to Dentrix G5 and converting your Dentrix database, a message appears, stating that the Dentrix G5 conversion can require considerable time depending on the size of your database. If you want to proceed with the database conversion and Dentrix installation, click **Yes**.

As Dentrix is being installed on your computer, the Setup Status screen displays the current setup status.
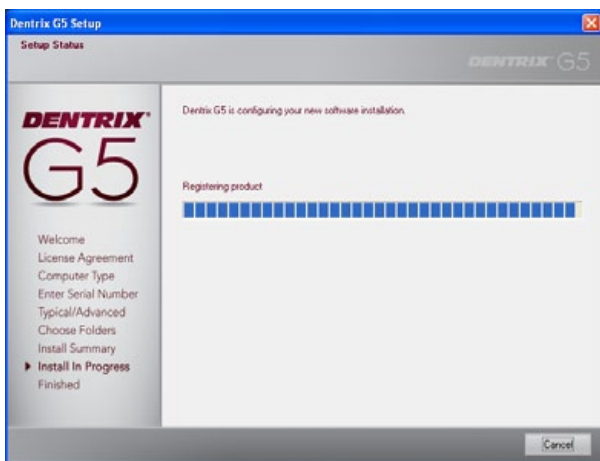
Note: If you see the Microsoft Office Customization Installer message at some point, click Install to continue the installation of this component.

Microsoft Office Customization Installer

Publisher cannot be verified

Are you sure you want to install this customization?

Name:	DTX_LMAddIn
From:	file:///C:/Program Files/Dentrix/LMAddIn/DTX_LMAddIn.vsto
Publisher:	Unknown Publisher

While Office customizations can be useful, they can potentially harm your computer. If you do not trust the source, do not install this software. More Information...

Install   Don't Install

If you have installed eSync 3.0 or later on the computer, the Dentrix installation will install the latest version of eSync and the eSync plug-ins, which includes Dentalink, an intra-office messaging tool.

Installing eSync. This may take up to 10 minutes, please allow the eSync install to complete successfully before closing the Dentrix install.

If eSync 3.0 or later is not installed on the computer, you will need to download and install the latest version of eSync at www.dentrix.com/products/eservices/esync/g5-esync-download.aspx.

After Dentrix is installed, the Setup Complete screen appears.

DENTRIX G5 Required Components Setup - 15.0

DENTRIX G5

DENTRIX
G5

Welcome
License Agreement
Computer Type
Enter Serial Number
Typical/Advanced
Choose Folders
Install Summary
Install In Progress
▶ Finished

DENTRIX G5 Setup Complete.

Thank you for choosing DENTRIX.

Click 'Finish' to complete setup.

< Back   Finish   Cancel

15. Click **Finish**.

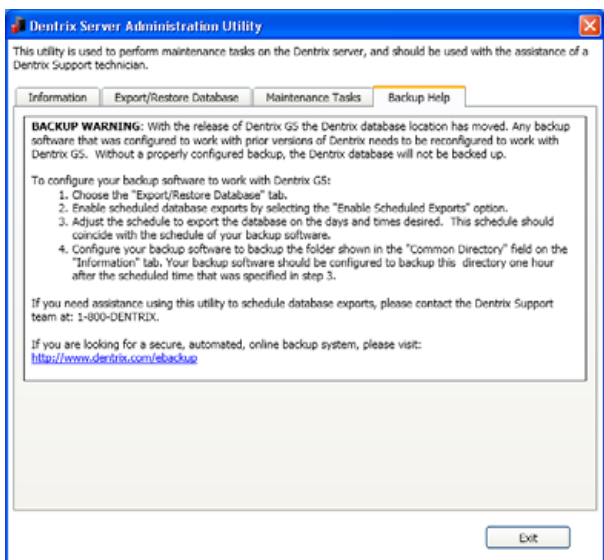A Backup Warning message appears, letting you know that Dentrix G5 uses a new location for its database.
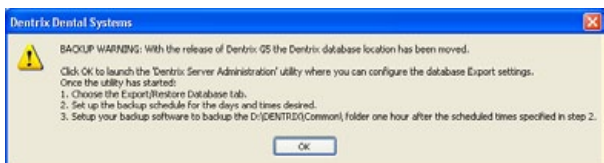
16. Click **OK**.

The **Dentrix Server Administration Utility** appears. Use this utility to schedule recurring exports of your Dentrix database to be backed up using your backup software (sold separately).

If you need assistance using the **Dentrix Server Administration Utility** to schedule database exports, please contact Dentrix Customer Support at 1-800-DENTRIX.

17. When finished, click **Exit**.

Note to integrators: For network installations, the C:\DENTRIX\ Common folder on the server should be shared. (The Dentrix installation will attempt to automate this.)
The Dentrix installation will add these exceptions to the Windows firewall (any third-party firewalls should be configured so that these ports are open): TCP 6602, TCP 6603, TCP 6604, TCP 6605, TCP 6606, UDP 6600, TCP 6597, and TCP 5712.

Registering/Activating Dentrix G5

You must register and activate Dentrix G5 in order to run your software and receive update information. It is recommended that you register and activate Dentrix at the time of installation. If you do not register at the time of installation, the activation dialog box appears when you open any Dentrix module. You have 30 days in which to register before registration/activation is required to use your software.

You can register/activate your software by clicking **Register Now**. You can temporarily skip the registration/activation process by clicking **Register Later**.
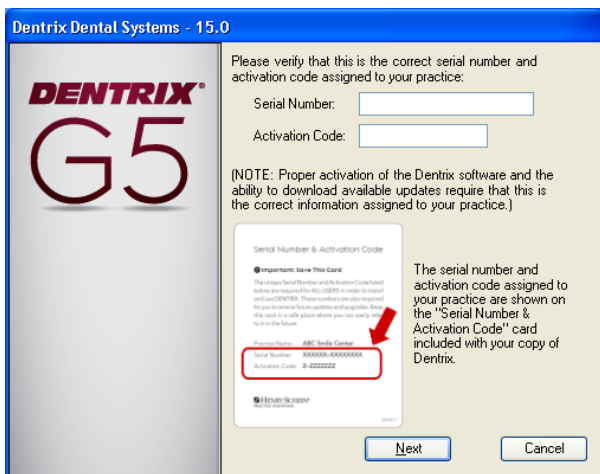
Register Now

You only need to register your software once, regardless of how many workstations you have.

To register your software

1. From any workstation, click **Register Now** on the registration/activation dialog box.

The serial number and activation code verification dialog box appears.

2. The serial number you entered when you installed Dentrix G5 appears in the **Serial Number** field. Verify that the serial number matches the serial number assigned to your office. You can find your serial number on the Serial Number & Activation Code card inside the Dentrix G5 software box.

3. In the **Activation Code** field, enter the activation code assigned to your practice. You can find your activation code on the Serial Number & Activation Code card inside the Dentrix G5 software box.

IMPORTANT: You must enter the correct serial number and activation code assigned to your practice. If you do not enter the correct serial number and activation code, you will not be able to activate the software properly or download the correct updates for your software.

4. Once you have entered the correct serial number and activation code, click **Next**.
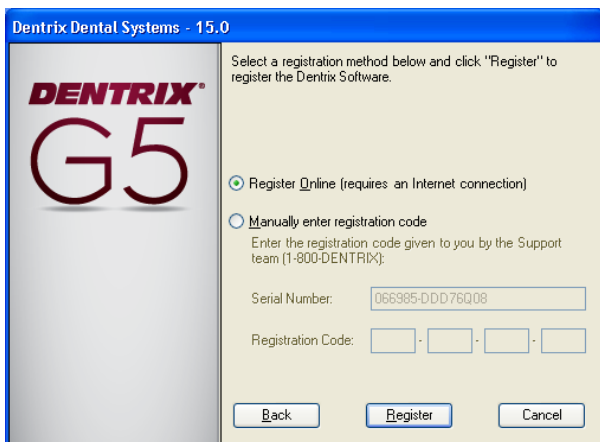
5. Select the desired option: **Register Online**, or **Manually enter registration code**.

Note: Registering online requires a valid Internet connection. If you do not have an Internet connection, you must manually enter the registration code.

These options are explained below.

Registering Online

To register your Dentrix software online

1. Click **Register**.

The registration utility checks your serial number and automatically registers and activates your software. A message appears when the activation has been completed successfully.

2. Click **OK**.

To register your Dentrix software manually

1. Call Dentrix Customer Support at 1-800-DENTRIX to obtain your complete registration code. When you call, you must have your full serial number available, which is located on the Serial Number & Activation Code card inside the Dentrix G5 software box.

2. Dentrix Customer Support will provide you with a 16-digit registration code. Enter your registration code (obtained by calling Dentrix Customer Support) in the fields provided (four digits in each field).

Important: The activation code found on your Serial Number & Activation Code Card is for online registrations only, and is not the registration code you should enter here.

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3. Click **Register**.

A message appears when the activation has been completed successfully.

4. Click **OK**.

Register Later

If you click **Register Later** on the registration/activation dialog box, the reminder will continue to appear once a day when you open Dentrix until the end of your 30-day grace period. After 30 days, the **Register Later** button is disabled on the registration/activation dialog box, and you must register Dentrix G5 before you can use it. Follow the steps in the Register Now section above to register/activate your software so you can use it.

Smart Upgrades

You can use the Smart Upgrades feature to deploy Dentrix G5 to the other computers on your network without accessing the setup files on the server or taking the DVD to the other computers.

As with all versions of Dentrix, once you have installed updates on any computer on your network, Dentrix requires you to install the updates on all other computers on your network.

With Dentrix G5, this process is automated. When you attempt to open a Dentrix module on a computer that has not yet installed the required updates, a message box appears, notifying you that the computer needs to install updates.
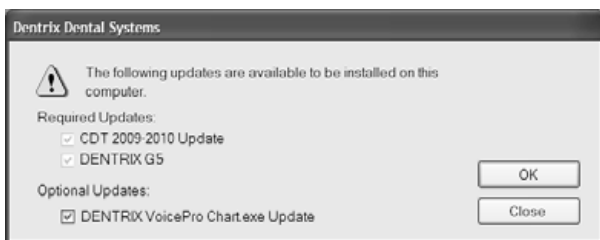
You must install the required updates to use Dentrix on that computer. If there are optional updates to install, you can choose to install those updates, but it is not required to run Dentrix.

To install the updates, click **Install**. All open Dentrix programs close, and an install status message box appears. The updates install, and you can then access Dentrix on that computer.

Note: If you stop the installation before it is finished, you will be prompted to install the updates again when you try to access Dentrix.

Installing Dentrix G5 Over a Network

If you do not want to use the Smart Upgrades feature to install Dentrix G5 on the other computers on the network, you can follow these instructions and install Dentrix G5 from the setup files on the server. This installation method does not require the DVD.

To install Dentrix G5 over a network

1. Click the Windows Start button and click **Run**.

2. Enter **\\[server]\Common\Installs\G5\Setup.exe** on the command line, where "Server" represents the name of your server on the network. The Installation Setup screen appears for several seconds, followed by the Welcome screen.

3. Click **Install Software**. The screen that appears lists the products you can install. From this screen, you can install Dentrix G5 and the Required Components.

4. Click **Install Dentrix G5**.
   The InstallShield Wizard displays the Welcome screen.

5. After reading the Tips for a Successful Installation, select **I have read and followed the tips for a successful installation** and click **Next** to continue.

6. Read the Henry Schein Software End User License Agreement. When you have read the document, select
   I accept the terms of the license agreement and click **Next** to continue.

Note: You can print a copy of the Henry Schein Software End User License Agreement by clicking the Print button.

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7. Select the type of installation you are running from the list.

8. When you click **Next**, Dentrix will run a System Requirements check. If your system meets the requirements, the installation continues to the next step. If your system does not meet the requirements, the **Dentrix System Requirements Notice** dialog box displays what your system needs in order to meet the system requirements.

9. Enter your **User Name** and **Serial Number** that was included in the installation package. If you are upgrading, the serial number will automatically appear in the **Serial Number** field. A valid serial number must be entered for the installation to continue.

10. You can perform one of two installation types: **Typical** or **Advanced**. With a typical installation type (recommended for most computers) folders are placed in the default locations, and all of the default Dentrix G5 features are installed. With the advanced installation, you can specify the location of the Dentrix files.

11. After you have reviewed the installation settings, if you want to make changes, click **Back** and change the settings. When the settings are correct, click **Install** to begin installing Dentrix G5.

12. After the Dentrix software has been installed, the Setup Complete screen appears.

13. Select whether you want to restart your computer now or later and click **Finish**.

www.Dentrix.com

Support: 1-800-DENTRIX

727 East Utah Valley Drive, American Fork, Utah 84003

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