DENTRIX G6

Installation Guide

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Dentrix G6.2 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 G6.2 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 G6 System Requirements 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 Help, which you can access from the Help menu of each Dentrix module. A secondary resource is the *Dentrix G6 User's Guide* (available on the Windows desktop after installing Dentrix and in the Dentrix Resource Center at www.dentrix.com/resource-center). 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 G6.2

In an effort to provide you with current technology solutions, the Dentrix G6.2 installation program is available over the Internet. If your computers meet the Dentrix G6.2 system requirements, installing Dentrix G6.2 from the Internet will not be a problem for your office. If you have any questions about installing or want to make sure your hardware is ready for Dentrix installation, please contact your hardware technician or call Dentrix Customer Support at 1-800-DENTRIX.

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 G6.2. The current Dentrix G6.2 System Requirements 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 too. Verify the integrity of all backups to ensure you have a good backup before upgrading from a previous version of Dentrix. For more information, refer to the eBackup 14.0 for Dentrix Recommendations document in the Dentrix Resource Center at www.dentrix.com/support/resource-center.

3   **Check Available Disk Space:** From the Start menu, click **My Computer**. Right-click the C:\ drive icon and then click **Properties**. The **Local Disk Properties** dialog box appears, and the **General** tab displays the used and free disk space. Refer to the Dentrix G6.2 System Requirements for the required free hard disk space for servers and workstations. The current system requirements 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 G6.2 Server installation.

4   **Prepare for Server and Workstation Installation:** Find the Serial Number/Activation Code. You will need these numbers during the installation. You can find these numbers in in your G6.2 wlecome email message. If you are upgrading, check the Batch Processor and the Practice Assistant for reports. Print the reports to clear the Batch Processor. Print the genenarted reports in the Practice Assistant. Send all unsent electronic claims.

Note: Since the Dentrix G6.2 installation/upgrade process may clear any reports in the Batch Processor or Practice Assistant and delete any unsent electronic claims, we recommend that you print any reports you need before installing or upgrading.

5   **For Upgrades, Verify the Correct Version is Currently Installed:** You must install Dentrix G6 or G6.1 before you can upgrade the program to Dentrix G6.2. To determine which version of Dentrix is installed, from the **Help** menu in the Office Manager, click **About Office Manager**. If the version is not Dentrix G6, you must install all product upgrades to bring the version to G6. For example, if Dentrix 11.0 is currently installed, you must upgrade to G6 before installing Dentrix G6.2.

6   **Exit Dentrix at Each Workstation and Close All Other Programs:** 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, disable any anti-virus and screensaver software and then re-enable it after you have completed the Dentrix installation. Shut down each workstation (to prevent others from starting Dentrix while it updates).

7   **Follow the Installation Instructions:** Make sure you follow all of the step-by-step instructions in the *Dentrix Installation Guide* as you install Dentrix G6.2.

8   **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.

9   **Before installing Dentrix G6.2:** Check with the applicable application vendors to access these G6.2-compatible versions. To see a list of authorized vendors with applications designed to integrate with Dentrix G6.2, visit: www.dentrix.com/products/henry-schein-partners.

Installing Dentrix G6.2

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

1. Click the link in the email message you received after purchasing Dentrix. The following screen appears within a few seconds.

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, some computers may need to be rebooted.
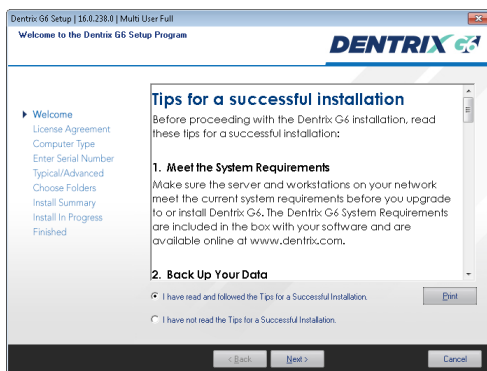
Dentrix installs several prerequisites that are needed for Dentrix G6.2.

The Third Party Software Notice appears.

The Dentrix installation then displays the Welcome screen.

2. 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 are prompted to back up your data before proceeding. If you have backed up your data, click **Yes** to continue the installation.
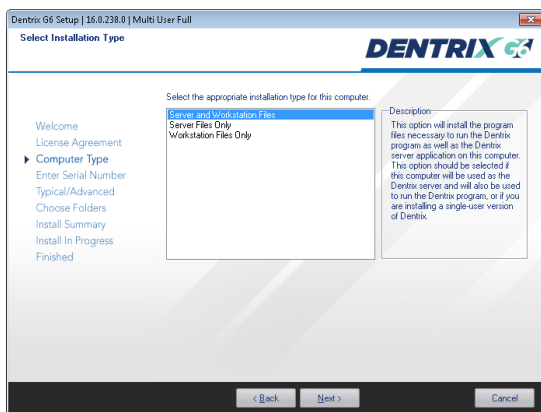
The End User License Agreement screen appears.
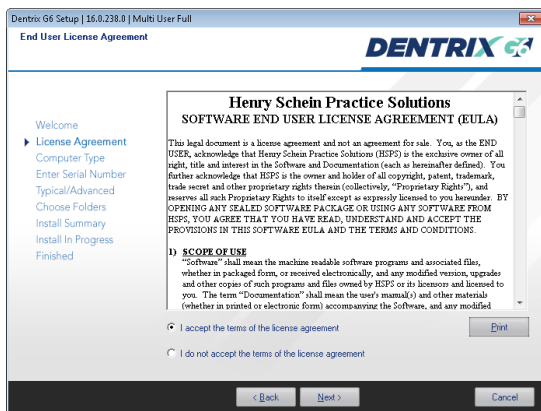
3. After you have read the Software End User License Agreement, select **I accept the terms of the license agreement** and click **Next** to continue.

The Select Installation Type screen appears.

4. Select the type of installation you are performing:

Note: You must upgrade or install the Dentrix server first before you can install Dentrix on any workstations.

- Server and Workstation Files – Select if this computer will be the Dentrix server and a workstation, or if you are installing a single-user version of Dentrix.

- Server Files Only – Select if you are installing on the computer that will act as the Dentrix database server for all other computers on the network.

- Workstation Files Only – Select if you are installing Dentrix G6.2 on a front office or clinical workstation over a network and have already run the server installation on another computer on the network.

5. Click **Next**.

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

A message appears asking if you want to use an existing Dentrix database or install a blank (empty) database (for new users).

6. Click the option that is applicable to your office **Use an existing Dentrix database**, or **Create a blank (empty) database**.

If you selected the **Workstation Install Only** option, a list of available Dentrix servers appears and Dentrix prompts you to select the server that you want to connect to.
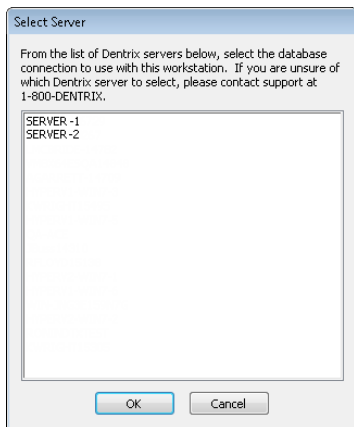

7. Select the server that you want to connect to and click **OK**.

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 **System Requirements Notice** dialog box displays what your system needs in order to meet the system requirements.
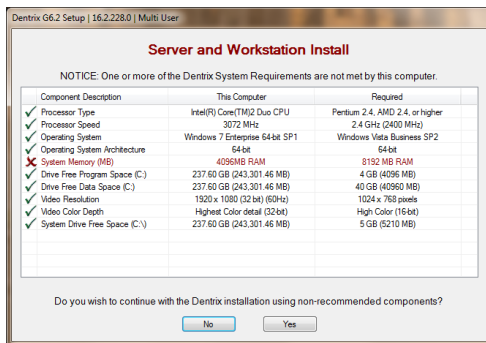
8. If the **System Requirements Notice** dialog box appears, verify the system requirements. A green check mark indicates that a component meets the requirements. A red "X" indicates that a component does not meet the requirements. To discontinue the installation and install the required components (recommended), 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.
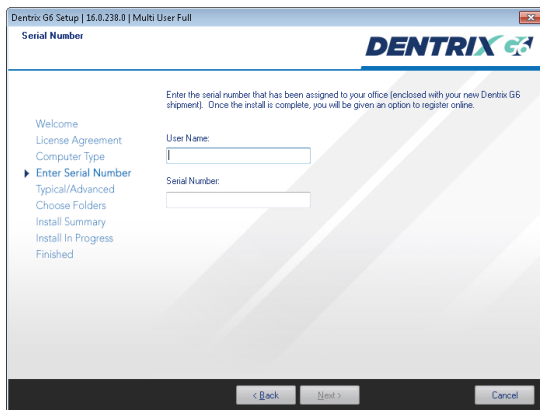
9. Enter your **User Name** and **Serial Number**. Your serial number is in the email message that you received when you purchased Dentrix.

If you are upgrading, the serial number you previously used to install Dentrix appears automatically in the **Serial Number** field. Verify that the serial number is the one 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 email message you received or the card that came with your Dentrix software. Enter the serial number assigned to your office to continue with the installation.
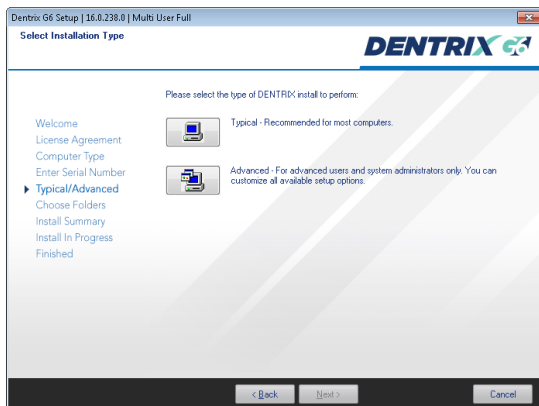

Important: You must enter the serial number assigned to your office in the **Serial Number** field so that the registration/activation and Check for Updates features work properly.

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10. Click **Next**.

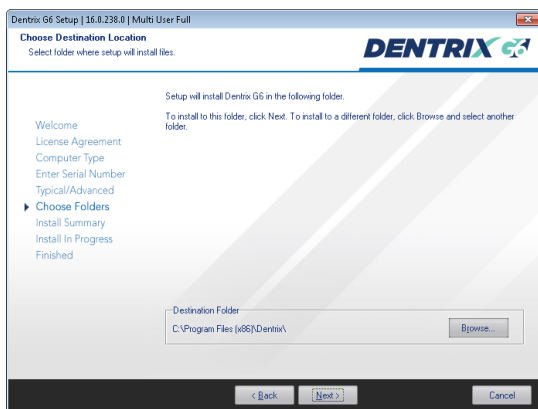The Select Installation Type screen appears.

11. You can perform one of two installation types: **Typical** or **Advanced**. With a typical installation type (recommended for most computers), Dentrix creates folders in the default locations, and installs all of the default Dentrix G6.2 features. 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 11. If you select **Advanced**, the **Dentrix Server Drive Select** dialog box appears. Follow these substeps before proceeding to Step 12.
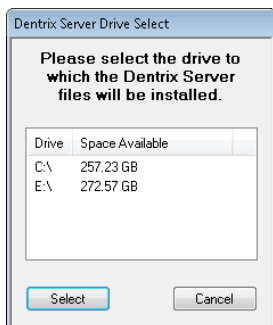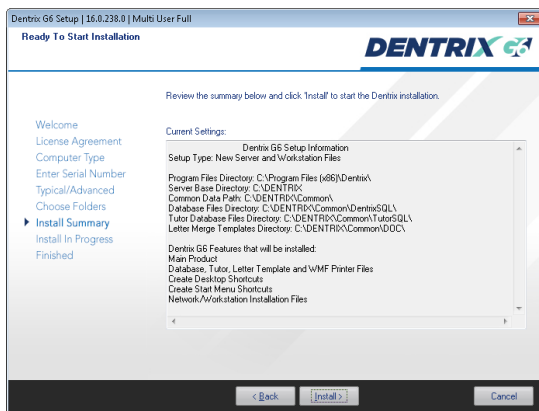
A. Select the drive where you want to install the Dentrix server files and click **Select**.

The Choose Destination Location screen appears.

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

The Start Installation screen appears.

12. Review the settings specified for your installation. To make changes to any of the settings, click **Back** and change them. When the settings are correct, click **Install**.

If you are upgrading to Dentrix G6.2 and converting your Dentrix database, a message appears, stating that the Dentrix G6.2 conversion can require considerable time depending on the size of your database. To proceed with the database conversion and Dentrix installation, click **Yes**.

As Dentrix installs on your computer, the Setup Status screen displays the current setup status.
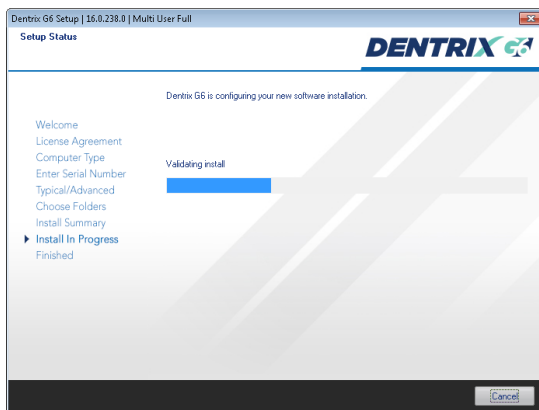
The Passphrase screen appears.
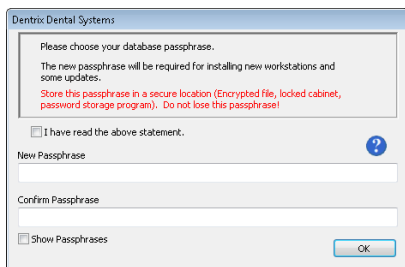
13. Do the following, and then click **OK**:

• Read the message and select **I have read the above statement**.

• Enter a passphrase that is at least 10 characters long and contains at least one of each of the following: a capital letter, a numeral, and a special character (asterisk, question mark, or other character).

If you have installed eSync on the computer, the Dentrix installation prompts you to dowload the latest version of eSync and the eSync plug-ins, which includes Dentalink, an intra-office messaging tool.

If you use eSync, and eSync is not installed on the computer, you must download and install the latest version of eSync.

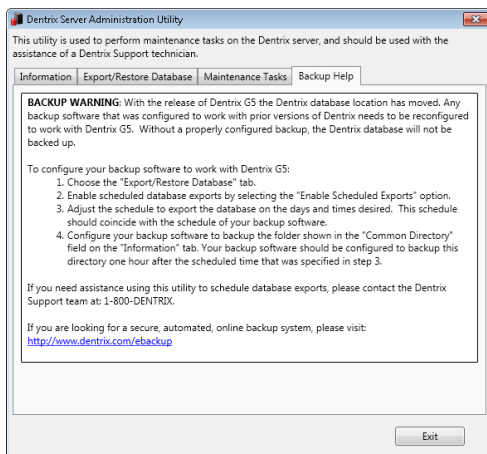After Dentrix is installed, the Setup Complete screen appears.
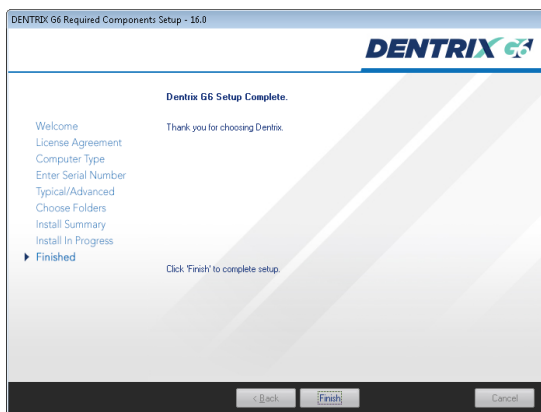
14. Click **Finish**.

15. 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.

16. 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 (configure any third-party firewalls so that these ports are open): TCP 6597, TCP 5712 TCP 6602, TCP 6603, TCP 6604, TCP 6605, TCP 6606, TCP 6610, and UDP 6600.

Registering/Activating Dentrix G6.2

You must register and activate Dentrix G6.2 to run your software and receive update information. We recommend 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.
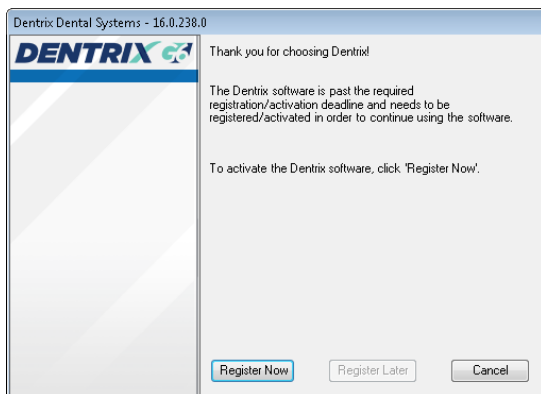
To register/activate your software, click **Register Now**. To temporarily skip the registration/activation process, click **Register Later**.
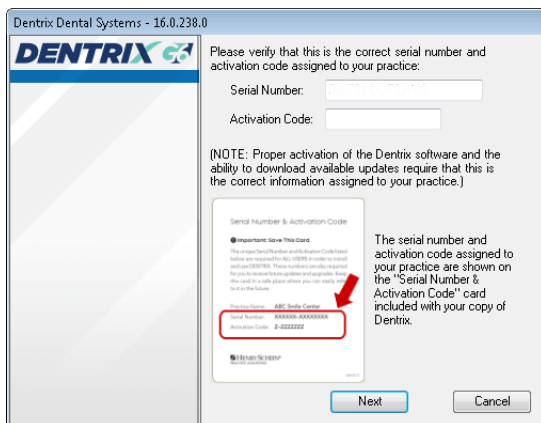
Register Now

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 G6 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 in the email message or on the Serial Number & Activation Code sticker in the Dentrix software box you received when you purchased Dentrix G6.

3. In the **Activation Code** field, enter the activation code assigned to your practice. You can find your activation code in the email message or on the Serial Number & Activation Code sticker in the software box you received when you purchased Dentrix G6.

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 cannot activate the software properly or download the correct updates for your software.

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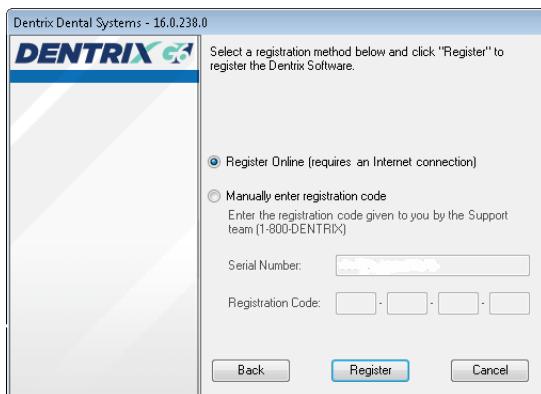
5. Select the desired option: **Register Online**, or **Manually enter registration code**.

Note: Registering online requires an 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 tool checks your serial number and automatically registers and activates your software. A message appears when the activation completes 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, from the email you received or on the Serial Number & Activation Code sticker in the Dentrix G6 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 in the email you received or on your Serial Number and 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 completes successfully.

4. Click **OK**.

Register Later

If you click **Register Later** on the registration/activation dialog box, the reminder continues 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 G6.2 before you can use it. Follow the steps in the Register Now section above to register/activate your software so you can use it.

Update Manager

Note: You can use the Update Manager to deploy Dentrix G6.2 to a computer on your network without accessing the setup files on the server. Once you upgrade one computer to G6.2, you can use the Update Manager to update the remainder of your computers. This is the preferred method of upgrading.

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

With Dentrix G6.2, this process is automated if you have already upgraded to Dentrix G6.2 on your server. 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 finishes, you are prompted to install the updates again when you try to access Dentrix.

Installing Dentrix G6.2 Over a Network

After you have upgraded to Dentrix G6.2 on your server, follow these instructions and install Dentrix G6.2 from the setup files on the server.

To install Dentrix G6.2 over a network

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

2. Enter **\\[server]\Common\Installs\g6.2\Setup.exe** on the command line, where "Server" represents the name of your Dentrix server computer 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 G6.2 and the Required Components.

4. Click **Install Dentrix G6.2**. The InstallShield Wizard begins installing Dentrix.

Note: If your system does not meet the system requirements, the **Dentrix System Requirements Notice** dialog box displays what your system needs in order to meet the system requirements.

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

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

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