Dentrix G6 & G7

BACKUP RECOMMENDATIONS

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LICENSING AND TRADEMARKS

Introduction

This document provides some basic recommendations for backing up your Dentrix G6 or G7 database. It does not provide comprehensive documentation on using backup software.

IMPORTANT LEGAL NOTICE: This document provides general guidelines for backing up the Dentrix database. It does not provide comprehensive instructions to cover every backup scenario. Creating a successful backup of the Dentrix database is your responsibility, and Henry Schein One is not liable for the creation of customer backups or failure thereof. Henry Schein One strongly recommends you include redundancy in your data backup plan, including both onsite and additional encrypted backups. It is your responsibility to ensure redundancy, business continuity, and disaster recovery to maintain your records and files.

Selecting the Files and Folders to Back Up

Using your backup software, you must select the data you want to back up.

Important: With the release of Dentrix G5, the Dentrix database location has been moved to a new location. If you upgraded to Dentrix G6 or G7 from a version of Dentrix earlier than G5, your current backup configuration will no longer be valid. To back up your Dentrix G6 or G7 database, you will first need to use the Dentrix Server Administration Utility to export a copy of your database to <Drive Letter>:\DENTRIX\ Common. You will also need to reconfigure your backup software to back up the copy of your database. If you use a third-party backup product, please contact Henry Schein One TechCentral (800-288-7691) or a qualified integration specialist.

It is important to back up *all* of your important computer files; however, it is critical that you back up your important Dentrix database files at a minimum. Remember that any data you choose to not back up cannot be restored in the event of data loss. Use the following information to determine what you want to back up:

- **Common\DBCopyForBackup** – Contains a copy of your Dentrix database. You must back up the entire contents of the **DBCopyForBackup** folder; otherwise, your Dentrix database will not be backed up.

You can update the files in the **DBCopyForBackup** folder by exporting a copy of your live database either manually or automatically. Use the Dentrix Server Administration Utility to manually export a copy of your database or to schedule recurring exports to happen automatically. For details on how to schedule this utility, see "Scheduling Database Exports" on page 2.

- **Common\DentrixSQL**

    - **Cust** – Contains Patient Chart customizations, including procedure buttons and layouts.

    - **DocFiles** – Contains documents stored in the Document Center.

    - **PatEd** – Contains your patient education images and text files you use with the Dentrix Treatment Plan Presenter.

    - **PatPicts** – Contains any patient pictures you have taken and stored in the Patient Picture module.

    - **PAData, Report Data, Reports, and Templates** – Contains report data stored in the Practice Assistant.

    - **SpellCheck** – Contains any customizations you have made to the Spell Check dictionary.

    - **Toolbar Log** – If you use the DXWeb toolbar, this folder will exist. It contains all logs of file uploads you performed during the period specified in the WebSync Wizard (for example, the past 2 weeks).

    - **Other files** – All files in the root of the **DentrixSQL** folder are configuration files required by Dentrix.

- **Common\Doc** – Contains your custom letter templates and letter merge data files (in the **EXPORTS** subfolder). There might be subfolders other than **EXPORTS** in the **Doc** folder if office staff each have separate custom templates they use for letter merges (or those folders containing custom templates could be located elsewhere).

- **Common\Installs** – Contains the Dentrix installation program files. (Not recommended as part of the backup.)

- **Common\TutorSQL** – Contains a sample Dentrix database. (Not recommended as part of the backup.)

For additional guidance on other Dentrix files you may want to back up, contact Dentrix Customer Support at 1-800-DENTRIX. For guidance on backing up other third-party software, please refer to the product documentation for that product or contact that company's technical support department.

Tip: To verify that you are backing up the correct files, in the Office Manager, from the **Maintenance** menu, point to **Practice Setup**, click **Preferences**, and then click the **Paths** tab. The dialog box provides the following information about the Dentrix server and file locations:

- **Database Server** – The computer that is acting as your Dentrix database server.

- **Common Directory** – The path to the shared folder on the selected **Database Server** that contains important Dentrix files to backup.

- **Letter Template Path –** The path to your letter templates and saved letter merge exports on the selected **Database Server**. (This path might be different on each computer in your office.)
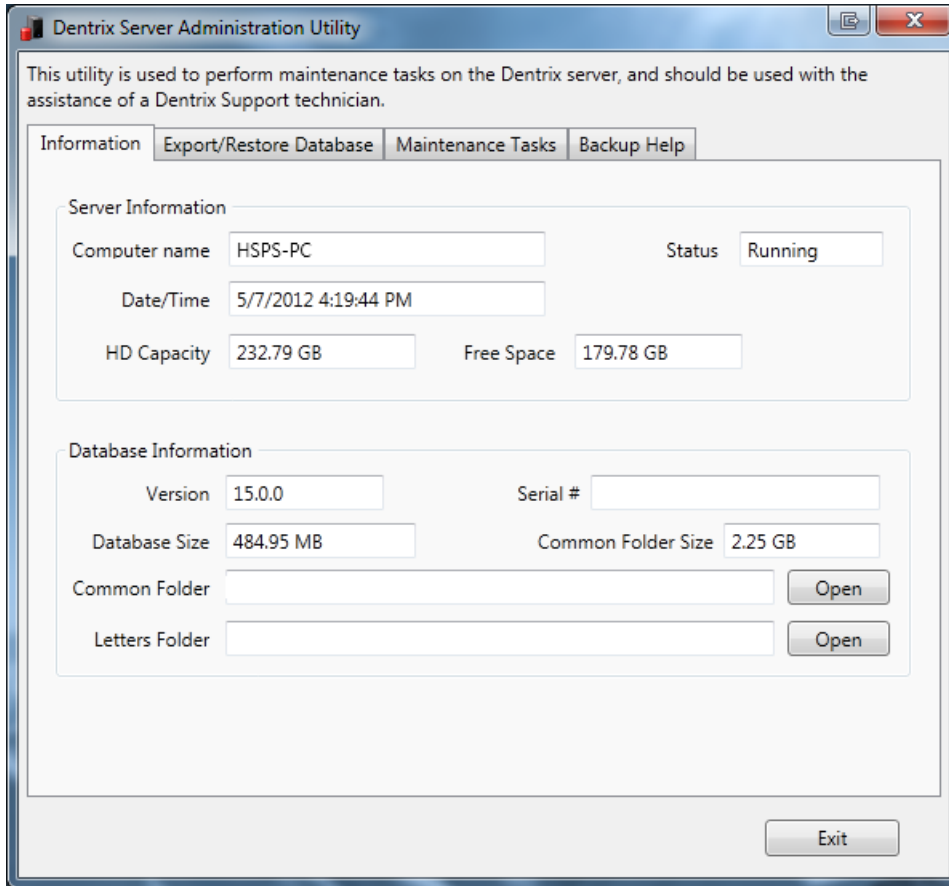
Scheduling Database Exports

Due to the nature of an SQL database, the Dentrix database server locks its database even when Dentrix is

not open on any computer on your network because the DentrixACEServer service is always running on the server. In order to back up the active database files, the database must be exported to a location where your backup software can back up the copy of your database. Use the Dentrix Server Administration Utility to schedule an export of your Dentrix database.
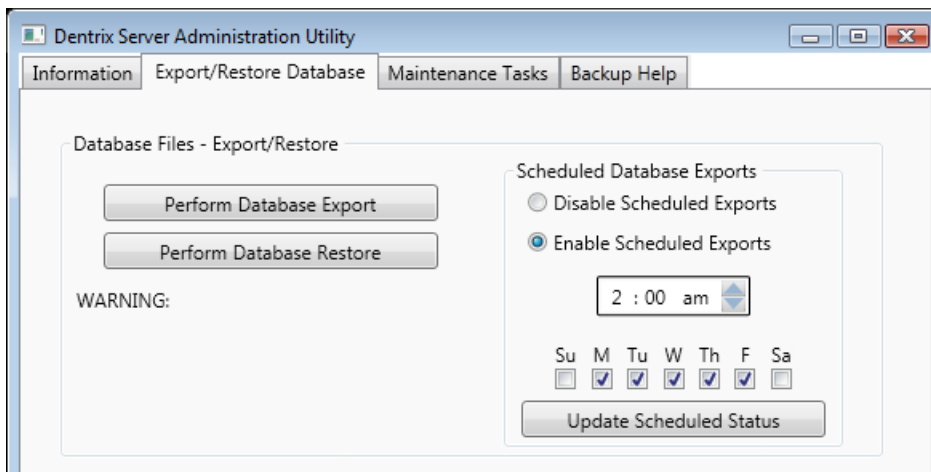
To schedule a database export

1. Close all Dentrix modules on all computers on the network.

2. On any computer, locate and double-click the executable for the Dentrix Server Administration Utility. The default location for the utility is **C:\Program Files\Dentrix_ServerAdmin.exe**.

    The **Dentrix Server Administration Utility** dialog box appears.

3. Click the **Export/Restore Database** tab.

    The **Export/Restore Database** tab options appear.

4. Under **Scheduled Database Exports**, select **Enable Scheduled Exports**.

5. Set up the following options:

   - **Time** – Enter the time when you want the export to occur.

   - **Days** – Select the check boxes that correspond to the days of the week you want the export to occur.

6. Click **Update Scheduled Status** to save the export schedule.

   The export will start at the specified time on the selected days until you disable this feature. The length of time required to make a complete copy of your database depends on the size of the database (the number of patients, transactions, claims, and so forth).

Tip: For additional informationor assistance, click the **Backup Help** tab.

Scheduling Backups

As you schedule your backup, remember that a copy of your database must have been exported manually or automatically with the Dentrix Server Administration Utility before your backup starts. So, allow enough time between when the Dentrix Server Administration Utility starts exporting a copy of your database and when the backup is scheduled to run.

Important:

- Remember to keep the Dentrix server (and any other computers you want backed up) powered on and connected to the Internet; otherwise, they will not get backed up.

- If you are using a security firewall or antivirus software, the person who manages your computer systems will need to exclude the following ports from your firewall and antivirus configuration:
  - 6600 UDP
  - 6602 TCP
  - 6603 TCP
  - 6604 TCP
  - 6605 TCP
  - 6606 TCP
  - 5712 TCP
  - 6597 TCP

Once your backups are configured, it is important to verify every day that your data is being backed up.