

easydental[®]

easy to use. easy to own.

Installation Guide

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EASY DENTAL AND MICROSOFT WORD

Easy Dental can be used with Microsoft Word. To use Easy Dental with Microsoft Word, you need to license and install Microsoft Word.

Installation Guide

Table of Contents

| | |
|---|----|
| Introduction | 2 |
| Easy Dental Organization | 2 |
| Easy Dental 11 Registration and Updates | 3 |
| Before Installing Easy Dental | 4 |
| How to Get Help | 4 |
| Tips for a Successful Installation | 5 |
| Installing the Server Software | 7 |
| Installing the Client Software | 12 |
| Starting Easy Dental | 13 |
| Registering/Activating Easy Dental | 14 |
| Register Now | 15 |
| Registering Online | 16 |
| Manually Entering the Registration Code | 17 |
| Registering Later | 17 |

Introduction

Easy Dental is a practice management software product that can help you manage your dental practice. With Easy Dental, you can schedule appointments, record and track patient information, create treatment plans and prescriptions, manage patient accounts and billing, run reports, and more.

To make tasks simple, Easy Dental assigns all tasks to graphical toolbars. Each primary task has its own set of features that are accessed from the toolbar. This streamlined layout allows you to quickly locate and use each feature.

Thousands of dental practices worldwide have proven the Easy Dental software to be capable of turning a practice into a viable and profitable business. Easy Dental boosts staff productivity, enhances professionalism, helps keep chairs full, increases collections, and improves the bottom line.

This Installation Guide will help you install and register your Easy Dental software.

Easy Dental Organization

Easy Dental is organized into ten different windows of information, or modules: Patients, Accounts, Treatment Plans, Chart, Prescriptions, Contacts, Schedule, Recall, Documents, and Reports.



Patients

The Patients module manages patients' demographic and insurance information. Patient information, such as patient's name, address, employer, insurance information, notes, and recall, are entered in this module.



Accounts

The Accounts module is used to manage patients' accounts. The Accounts module accurately details completed procedure costs, insurance claims, guarantor and insurance payments, and a running balance.



Chart

The Chart's complete chair-side integration makes it the perfect tool to simplify record-keeping. In the Chart, entering and documenting existing, recommended, and completed treatment is as simple as clicking a mouse. The Chart uses standard textbook charting symbols that are familiar and easy to use. This module also features the Estimator, a unique case presentation program that displays the treatment plan costs in terms of primary and secondary insurance portions and estimated patient's portion.



Treatment Plans

The Treatment Plans module is used to enter and track recommended procedures.



Prescriptions

The Prescriptions module is used to quickly create prescriptions and accurately track medicines prescribed to patients.



Contacts

The Contacts module acts as a contact manager for the office. All contacts and correspondence made with a patient can be recorded in this module.



Schedule

The Schedule module looks exactly like a paper schedule with the appointments blocked out in various colors, signifying different providers. With this module, appointments (including unscheduled appointments, recall appointments, and ASAP appointments) can be scheduled and tracked, significantly increasing production.



Recall

The Recall module allows you to effectively track and manage the recall system in your office. Recall will help you to stay on top of your patient retention with a series of lists and the ability to customize patient settings.



Documents

The Documents module allows you to attach electronic documents and images to patients, insurance carriers, providers, referrals, and employers.



Reports

The Reports module generates informative reports, performs practice analysis functions, and controls most printing processes. Easy Dental can be configured to your practice's unique needs in the Reports module.

Easy Dental 11 Registration and Updates

Registration/activation is required with Easy Dental 11. Registering/activating your software allows the Check for Updates feature to know which version of the software you are using to provide you with key software updates. Registration/activation also allows Easy Dental Customer Support Representatives to know which version of Easy Dental you are using in order to provide better service when answering your questions.

Easy Dental 11 makes it easy to install updates on all the computers in your office. You can use the Updates feature to check for updates online and automatically install them on any computer in your office.

Before Installing Easy Dental

Before installing and using Easy Dental, you should be familiar with using the computer. The Easy Dental 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 Easy Dental. For information on supported Windows versions, read the Easy Dental 11 System Requirements included in the box with your software and available online at www.easydental.com. For information about installing and using Windows, refer to the Windows documentation.

How to Get Help

Henry Schein Practice Solutions recommends that dental offices contact Henry Schein TechCentral (800-288-7691) or another qualified integration specialist for new installation or upgrade assistance.

You can find answers to many questions about Easy Dental in the Easy Dental User's Guide, or in the Easy Dental Help (by clicking the Help button found in the toolbar or by pressing Alt+H).

If you are on a current Easy Dental Customer Service Plan, you can find additional information, including on-demand tutorials, at www.easydental.com/resourcecenter. You can also access the Easy Dental technical support knowledgebase for answers to common questions.

If these methods do not provide an answer, contact Easy Dental Customer Support at (800) 824-6375. Toll-free telephone support is available only to registered users on a current maintenance contract. Registered Easy Dental users not on a current support contract will be billed for telephone support at the current support rate. Support is limited to the current version of the software and one prior release. When calling customer support, be near the computer with the problem, and be prepared to give the following information:

- The Easy Dental customer number assigned to the practice
- Your name and the name of the practice
- The Easy Dental version number (found in the Help drop-down under About Schedule in the Schedule module)
- The type of network being used, if any
- The version of Windows installed on the computer and on the server
- The exact wording of any messages that have appeared on the screen
- The circumstances surrounding the question or problem
- Steps that have been taken in an effort to reach a solution

Tips for a Successful Installation

The following installation tips will help you minimize or eliminate any issues when installing Easy Dental 11. For a successful installation, read and follow the instructions below before attempting to install Easy Dental 11.

- 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 Easy Dental 11. The current Easy Dental 11 System Requirements are included in the box with your Easy Dental software and are available online at www.easydental.com.
- 2 Back Up Your Data:** Create a backup of the Easy Dental database and related files (or create a backup image of the server's entire hard drive, if you prefer). If you are upgrading, back up the server's EzDental directory and all sub-directories. If any Easy Dental 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 Easy Dental. For more information, refer to the eBackUp for Easy Dental Recommendations document in the Easy Dental Resource Center at www.easydental.com/resourcecenter.
- 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 space on the computer. The current Easy Dental System Requirements are included in the box with your Easy Dental software and are available online at www.easydental.com.

Note: If you use imaging software and/or the Documents module, you must dedicate an additional 30-40 GB of hard drive space in addition to what is needed for the Easy Dental 11 Server installation.

- 4 Prepare for Server and Workstation Installation:** Find the Serial Number/Activation Code card inside the Easy Dental software box. These numbers will be needed during the installation. 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 Easy Dental upgrade process may clear any reports in the Batch Processor and delete any unsent electronic claims.

- 5 **For Upgrades, Verify the Correct Version is Currently Installed:** Easy Dental 2009 or newer must be installed before the program can be upgraded to Easy Dental 11. To determine which version of Easy Dental is installed, open Reports, then click **Help** and **About Reports**. If the version is older than Easy Dental 2009, all product upgrades must be installed to bring the version to Easy Dental 2009 or 2010. For example, if Easy Dental 2008 is currently installed, upgrade to Easy Dental 2009 or 2010 before installing Easy Dental 11.
- 6 **For Upgrades, Verify the File Locations:** If you are upgrading Easy Dental, locate the Easy Dental program, database, and template files. The locations of these files must be confirmed during the installation process. To view the file locations, open Reports, then click **Maintenance** and **Preferences**.
- 7 **Exit Easy Dental at Each Workstation and Close Other Programs:** Before installing Easy Dental, close any Easy Dental modules and any other programs on the Easy Dental server and all workstations. To avoid conflicts and allow access to all files and directories, you should disable any anti-virus and screen saver software and then re-enable it after you have completed the Easy Dental installation.
- 8 **During server installation:** it is best to shut down each workstation (to prevent others from starting Easy Dental while it is being updated).
- 9 **Verify the Easy Dental 11 CD Configuration:** Verify that the Easy Dental 11 Installation CD is the right CD for the office configuration (single user, multi-user, or office multi-user).
- 10 **Follow the Installation Instructions:** Make sure you follow all the step-by-step instructions in this installation guide as you install Easy Dental.
- 11 **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 Easy Dental Customer Support.

Installing the Server Software

If the program will be installed on a networked system, you'll need to install Easy Dental on the file server first.

To install the Easy Dental server software

1. Insert the Easy Dental 11 CD-ROM into your CD-ROM drive. If your computer is equipped with AutoStart technology, the installation begins automatically.

If the installation Welcome screen does not appear:

- A. Click **Start** and then click **Run**.
The **Run** dialog box appears.
- B. In the **Open** field, type D:\Launch.exe (where D: is the drive letter for the CD-ROM drive).
- C. Click **OK** to begin the installation.

After the installation program installs the needed prerequisites, the Easy Dental Welcome screen appears.



From the Welcome screen, you can click any of the following options:

- **Install Software** - Lets you proceed with the Easy Dental software installation.
- **Add-On Products** - Provides information about several eServices add-on products and digital imaging software you can use with Easy Dental, as well as options for training and marketing your practice.
- **Explore this CD** - Opens a window where you can easily explore the contents of the Easy Dental installation CD.

- **Customer Support** - Provides Easy Dental Customer Support contact information, support and upgrade plans, frequently asked questions, and troubleshooting information.
 - **Contact Us** - Displays contact information for Henry Schein Practice Solutions (address, phone numbers, and e-mail address).
 - **Documentation** - Provides access to the Easy Dental documentation in PDF format.
 - **Exit Installer** - Exits the Easy Dental installation program.
2. Click **Install Software**.
 3. Click **Install Easy Dental**.
 4. Click **Install Now**.

A message appears, recommending that you install Easy Dental after regular business hours and asks if you want to continue.

5. Click **Yes**.

The Tips for a successful installation screen appears.



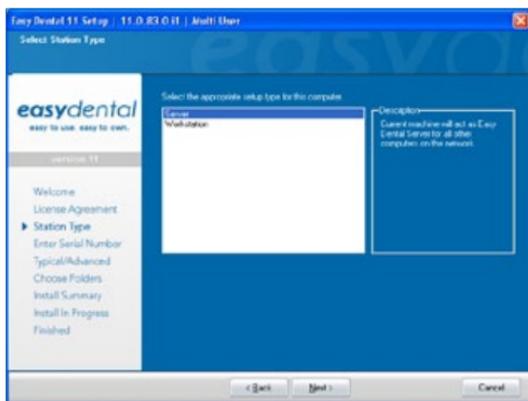
6. Read the Tips for a Successful Installation, then select **I have read and followed the 10 steps to a successful installation** and click **Next**.

The License Agreement screen appears.



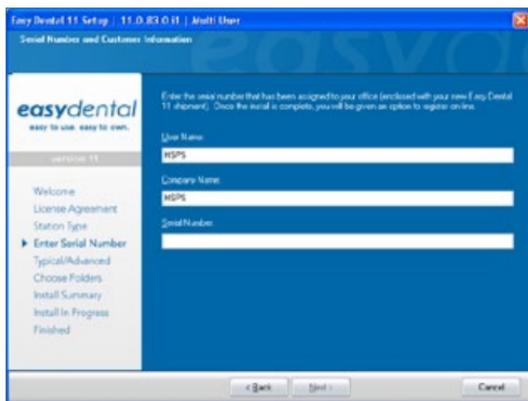
7. Read the Software License Agreement, then select **I accept the terms of the license agreement** and click **Next**.

The Station Type screen appears.



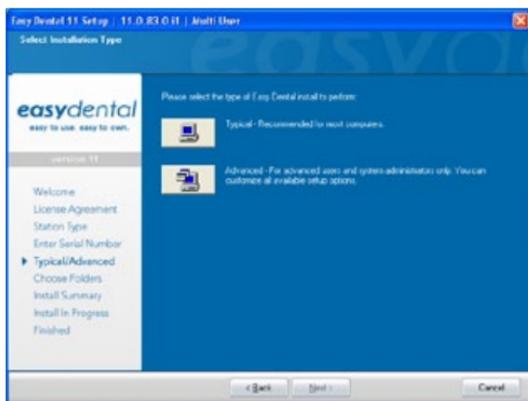
8. Select the type of installation you are performing:
 - **Server** - Select this type of installation if you are installing on the computer that will act as the Easy Dental server for all other computers on the network.
 - **Workstation** - Select this type of installation if you are installing Easy Dental on a front office or clinical workstation over a network and have already run the server installation on another computer on the network.
9. Click **Next**.

The Enter Serial Number screen appears.



10. Enter your name, the name of the company, and the serial number that was provided with the software, then click **Next**.

The Select Installation Type screen appears.

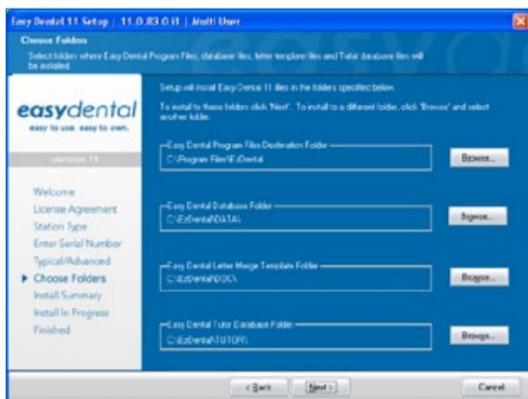


Note: If you are running Windows 7 or Windows Vista, and your data is located in the \Program Files or \Program Files(x86) folder, you will receive a message about data virtualization. Carefully follow the instructions in the message.

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 Easy Dental features are installed. With the Advanced installation, you can specify the location of the Easy Dental files.

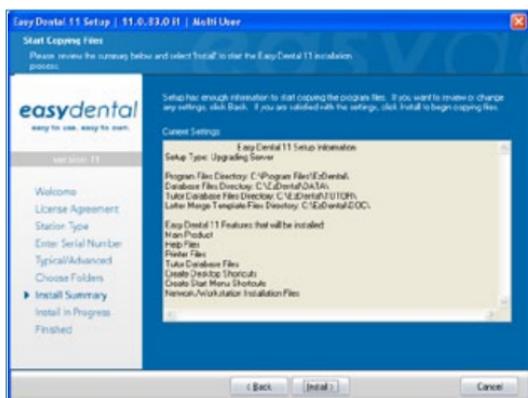
If you select Typical, proceed to Step 8.

If you select Advanced, the Choose Folders screen appears. Follow the following sub-steps before proceeding to Step 8.



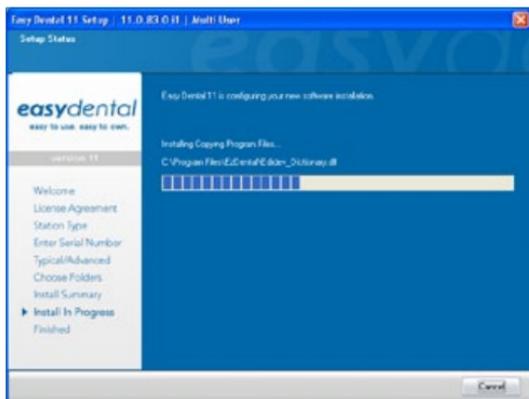
- A. The Choose Folders screen lists the destination directories for the Easy Dental 11 components. By default, the recommended directory is selected for new users. The current location is selected for upgrading users. If you want to use the default folder locations, click **Next**. If you want to change the folder locations, click **Browse** and browse to the desired location. When each directory is set to the desired destination, click **Next** to continue.

The Install Summary screen appears.

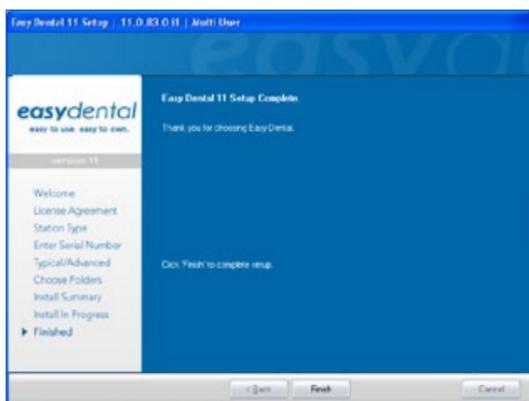


On the Install Summary screen, review the settings that have been specified for your installation. If you want to make changes to any of the settings, click **Back** and

change the desired settings. When the settings are correct, click **Install** to begin installing Easy Dental.



When the installation is complete, the Finished screen appears.



12. Click **Finish** to complete the setup.

Installing the Client Software

To install Easy Dental client software

1. Map a network drive to the EzDental directory on the file server. If you do not know how to map a network drive, contact your system administrator.

2. From the workstation, bring up the network drive that was mapped to the server's EzDental folder. Within the Data folder, open the Installs folder, then the EasyDental sub-folder. Double-click the setup.exe file.

The Easy Dental install program will start.

Note: The Easy Dental workstation installation requires a mapped drive. Problems can occur if you run the installation by connecting to the directory via a UNC path instead of mapping a drive.

3. Follow the steps in the previous section of this guide.

Note: The Data Files and Letter Templates options are not available for a workstation installation.

Starting Easy Dental

To start Easy Dental

1. From the Windows **Start** menu, point to **All Programs > Easy Dental**, then click **Easy Dental**.

Note: The installation also places a shortcut to Easy Dental on your Desktop.

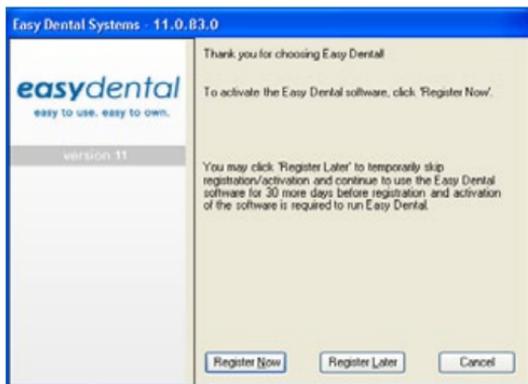
Registering/Activating Easy Dental

In order for Henry Schein Practice Solutions to be able to know which version of Easy Dental you are using to provide you with updates, you must register and activate Easy Dental 11.

In Easy Dental 11, registration and activation is required in order for you to run the software.

It is recommended that you register and activate Easy Dental at the time of installation. If you do not register at the time of installation, you have a grace period of 30 days in which to register before registration/activation is required. After the 30-day grace period, you must register/activate Easy Dental 11 in order to use your software.

If you do not restart your computer immediately after you complete the installation, the registration/activation dialog box appears. If you restart your computer immediately after you complete the installation, the activation dialog box appears when you open Easy Dental.



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

Note: You must complete the registration/activation within 30 days of installation. After 30 days, you will not be able to access your Easy Dental software until you complete the registration/activation.

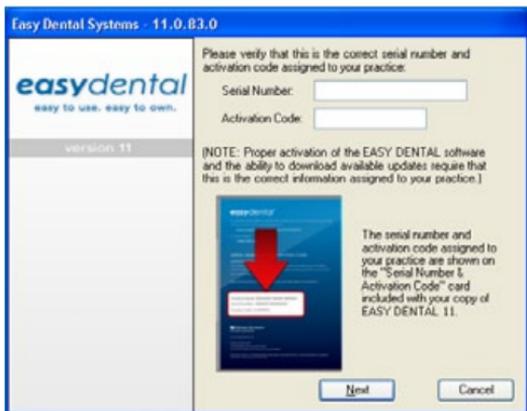
Register Now

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

To register your software

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

The serial number and activation code verification dialog box appears.



2. The serial number you entered when you installed Easy Dental 11 is displayed in the **Serial Number** field. Verify that the serial number listed matches the serial number assigned to your office.

Note: You can find your serial number and activation code on the card located inside the flap of the outer shipping box in which you received your Easy Dental 11 software.

3. In the **Activation Code** field, enter the activation code assigned to your practice.

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 assigned to your practice, click **Next** to proceed with the registration process.

The select registration method dialog box appears.



5. You have two registration options: register online or manually enter a registration code. Select the desired option and follow the directions below to register/activate your software.

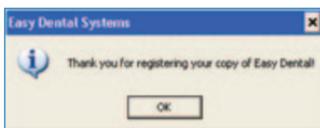
Note: Registering online requires an Internet connection. If you do not have an Internet connection, you must call Easy Dental Customer Support and manually enter the registration code.

Registering Online

To register/activate your Easy Dental software online

1. Click **Register Online**.

The registration utility will verify your serial number and automatically register/activate your software. A message appears when the activation has been completed successfully.



2. Click **OK** to close the message box and open Easy Dental.

Manually Entering the Registration Code

To register and activate your Easy Dental software manually

1. You must call Easy Dental Customer Support at 1-800-824-6375 to obtain your complete registration code. When you call customer support, you must have your full serial number available, which is located on the back of the CD case.
2. Easy Dental Customer Support will provide you with a 16-digit registration code. Enter your registration code (obtained by calling Easy Dental Customer Support) in the fields provided (four digits in each field).

Note: 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.

3. Click **Register**.

A message appears when the activation has been completed successfully.

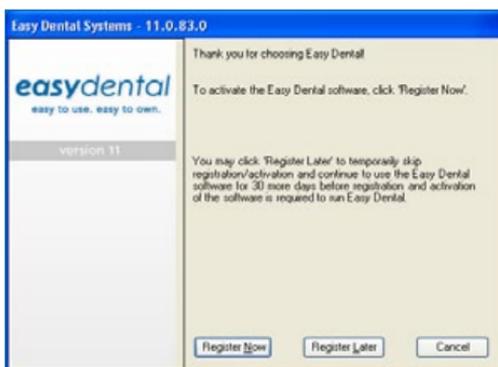
4. Click **OK** to close the message box and open the module you were trying to access.

Registering Later

If you click Register Later on the registration/activation dialog, the registration/activation dialog is closed and the module you were trying to access opens.

Until you register Easy Dental 11, the registration/activation dialog appears once a day and reminds you how many days you have left until you must register/activate Easy Dental 11.

Since registration/activation is required, you can only click Register Later for 30 days after you install Easy Dental 11. After 30 days, the Register Later button is disabled on the registration/activation dialog. At that point, you must register Easy Dental 11 before you can access the program.



Follow the steps in the Register Now section above to register/activate your software so you can use it.

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