
easydental[®]
2008

installation guide



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Easy Dental and Microsoft Windows

Easy Dental operates in a graphic environment called Microsoft Windows, created by Microsoft Corporation. Microsoft Windows gives a standard look and feel to Easy Dental and all other Windows applications. To run Easy Dental and Microsoft Windows, you need to license and install Microsoft Windows

Easy Dental and Microsoft Word for Windows

Easy Dental can share its database with Word for Windows, a word processing product created by Microsoft Corporation. To use Easy Dental with Word for Windows, you need to license and install Microsoft Word for Windows.

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introduction

Easy Dental is designed as a user-friendly software product that caters to every dentist and dental staff member. Every task completed with Easy Dental is simple and straight-forward. From scheduling appointments, to billing, to management reports, Easy Dental is a user-friendly tool that helps successfully manage a practice.

To make operations simple, Easy Dental has taken the unique step of assigning all tasks to graphical toolbars instead of complicated menus. Each primary task has its own set of features that are accessed from the toolbar. This streamlined structure allows the user to locate and use each feature quickly and efficiently.

Easy Dental provides a technical support team to answer questions and solve concerns. Our support technicians undergo extensive weekly training to keep abreast of the latest technical information.

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, increases collections, helps keep chairs full, and improves the bottom line. From front desk to operator, to x-ray, Easy Dental provides profitable integration solutions.

Easy Dental Organization

Easy Dental is organized into ten different windows of information, or modules: Patients, Accounts, Treatment Plans, Chart, Rx Writer, 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. Patients are organized by family, and a patient's position within a family can be viewed 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.



Treatment Plans

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



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.



Rx Writer

The Rx Writer 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 correspondence and contacts 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 appointment, 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 companies, 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 2008 New Features List

The following features and enhancements are new to the Easy Dental 2008 release. This is not a comprehensive list, but the main features and enhancements are mentioned here.

Lab Case Manager

With the new Lab Case Manager, tracking lab cases in Easy Dental 2008 is simple. You can create a lab case for the patient, ship it to the lab, and track its progress. The Lab Case Manager is directly linked to the Schedule module so you can see right from a patient's appointment whether their lab case has been received.

Auto Dial

The new Auto Dial feature allows you to call your patients with the click of a button right from your computer. You can also keep track of the conversation by posting an entry in the Contacts module right from the Auto Dial dialog.

Installation Improvements

Installing Easy Dental 2008 is easier than ever! With Easy Dental 2008, you can spend less time setting up the installation by selecting to run a "Typical" installation that will install Easy Dental 2008 according to the most common installation settings. The Easy Dental 2008 installation improvements provide easy registration for eServices products as well.

The Easy Dental 2008 installation also includes a remote access feature that will help Easy Dental Customer Support give you the highest quality support possible.

Insurance Claims Not Sent Report

With the new Insurance Claims Not Sent Report, you can find insurance claims with a Not Sent status. By finding insurance claims with a Not Sent status, you can better track those claims that have not been sent to the insurance, helping you increase your bottom line.

Miscellaneous Features within Easy Dental

The Month End process has been improved to help you prevent corruption or loss of data when closing the month.

In the Chart module, you can now change the colors on the Graphic Chart as well as in the Progress Notes to make finding procedures in the Chart quicker and easier. An Auto-State button has also been added that allows you to post multiple procedures with the same status (e.g. completed, existing, or treatment plan) at the same time without clicking the status button.

In the Accounts module, default you can display the account detail by default by clicking the View Account Details button. Once you click the button, Easy Dental saves your settings and keeps the button activated until you click it again.

The Aging Report can now calculate the aged balance as of a specific date so that you can get an Aging Report for past months.

The provider NPI has been added to the patient walkout statement, and several new claim forms and prescription forms have been added.

Add-on Product Enhancements

When you use QuickBill, patient address correction from NCOA (National Change of Address) is integrated with the Patients module.

With the new WebSync Wizard, you can set up Easy Dental to integrate with eCentral all from one simple wizard rather than from multiple setup dialogs.

What You Should Know First

Before installing Easy Dental 2008, become familiar with basic computer usage, including how to turn the computer on, how to access and designate disk drives, and how to reset or reboot the computer.

Microsoft Windows XP Professional or higher must be installed before Easy Dental 2008 can be installed. For information on installing Windows, consult your Microsoft Windows package.

It is essential to understand the fundamentals of using Windows in order to use the Easy Dental software. This documentation is written with the assumption that users know how to use a mouse, and how to open a Windows menu and select options. Consult the Microsoft Windows documentation to learn more about these actions.

How to Get Help

Most questions regarding Easy Dental 2008 can be answered by referring to the User's Guide or by using the context sensitive help available in the Easy Dental software by clicking the Help button found in the toolbar or by pressing Alt + H.

If these methods do not provide an answer, contact Easy Dental Customer Support at **(800) 824-6375, option 2**.

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 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

Note: The Easy Dental Support staff has extensive experience in supporting the Easy Dental 2008 software and, as software support, they are not authorized to answer questions or solve problems relating to hardware, network, operating system, or computer configurations. Hardware, network, and operating environments vary from office to office; therefore, questions regarding these topics should be addressed by a hardware and/or operating system support representative from the appropriate vendor or a CIE. Operating system questions can generally be answered by reading the Windows documentation or consulting www.microsoft.com.

Easy Dental User's Guide

The Easy Dental User's Guide is available in PDF format. The User's Guide is installed with the Easy Dental software and can be accessed by clicking the Desktop icon or by clicking Easy Dental User's Guide in the Easy Dental folder of the Start menu. The User's Guide is also available online at www.easydental.com.

installation

Use this installation guide to install Easy Dental. Follow each step of the installation carefully so as to ensure a successful installation. Read the System Requirements, Before Installing, and the Tips for a Successful Installation sections before you begin your installation.

System Requirements

Due to the new features and technology included in Easy Dental 2008, it is very important to ensure that your system meets the latest system requirements.

System requirements are subject to change according to current computer industry standards. For the latest system requirements, visit **www.easydental.com** or call **1-800-824-6375, option 2**. Review the system requirements before installing Easy Dental 2008 to ensure a successful installation or upgrade of the software.

Before Installing

The information contained in the following sections is vital to a smooth installation of Easy Dental 2008. Read this section carefully before beginning the installation. If Easy Dental 2008 is being installed on a network, the installation process must be completed on each workstation. Install Easy Dental 2008 on the file server (the system where the data files will be stored) first.

Note: If your network has a dedicated file server (a system with a Windows operating system installed), you should not install Easy Dental on it. Instead, install Easy Dental on the first workstation as if it is the file server. Be sure to direct paths for the Data Files and Letter Templates to the dedicated server's hard drive. For help setting up a dedicated server network, please contact a qualified network technician.

Tips for a Successful Installation

The following installation tips have been prepared to help minimize or eliminate any issues when installing Easy Dental 2008. For a successful installation, follow the steps below exactly. Please read through all the steps before attempting to install Easy Dental 2008.

Note: Easy Image 4.5 is not compatible with Easy Dental 2008. Easy Image 4.1 or higher must be installed before installing Easy Dental 2008. Call 1-800-824-6735, option 2 with questions about Easy Image 4.5 compatibility or for any other questions about these installation tips.

1. Ensure Your System Meets the Overall System Requirements

Ensure the system meets the overall system requirements for Easy Dental 2008 before installing or upgrading. It is very important to review the system requirements for Easy Dental 2008 and verify that each computer meets all of the requirements prior to installing or upgrading the Easy Dental software. Some versions of the Microsoft Windows operating system are no longer supported with Easy Dental 2008.

- Easy Dental 2008 requires more RAM (memory) than previous releases and may require an upgrade of the memory in the computer. Adequate processor speed and network configuration is important to help reduce or eliminate any latency/performance issues as they relate to Easy Dental 2008. The amount of free memory on any computer can greatly impact the performance of the computer and also the performance of the overall Easy Dental software. Reducing or eliminating the number of unnecessary processes on a computer can significantly improve a computer's performance.

When the system requirements are closely scrutinized and adhered to, the potential for a successful installation/upgrade experience increases dramatically. Easy Dental highly recommends the use of a Certified Integration Engineer (CIE) when installing or upgrading Easy Dental or for verifying system requirements on your computers prior to installing Easy Dental 2008.

2. Back Up, Back Up, Back Up

If possible, a backup should be created for the entire server hard drive. For an upgrade, at a minimum, 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. Consult an Easy Dental CIE or contact the support organization for your backup software before upgrading to Easy Dental 2008. It is very important to have a valid, verified backup when you are upgrading from a previous version of Easy Dental.

For worry-free data security, try eBackup for Easy Dental. Call 1-800-824-6375, option 1, for details.

3. Check Available Disk Space

From the Start menu, click My Computer, click the C:\ drive icon and select View, then Details from the toolbar. You may also right-click the C:\ drive icon and select Properties. Click the General tab to display the used and free space on the computer. For a workstation install, the free space on disk should be over 2 GB. For a server install, the free space available on disk should be over 10 GB. Although the actual Easy Dental 2008 program requires approximately 1 GB of free hard disk space, it is recommended that at least 2 GB be free at all times for the Windows operating system.

Note: Using Easy Image and/or using the Documents module requires dedicating additional hard drive space (30 – 40 GB more than the 10 GB of free space needed for the Easy Dental 2008 Server installation) to adequately provide storage for current and future patient images and documents. Evaluate the computer's available disk space and plan appropriately.

4. Prepare for Server and Workstation Install

Follow these four steps to prepare for the installation:

- Find the serial number. This number may be needed during the install.
- If you are upgrading Easy Dental, check the Batch Processor for reports. Print the reports and clear the Batch Processor. Send all unsent eClaims.

-
- If you are upgrading Easy Dental, close Easy Dental on each workstation before starting the server install. It is best to shut down each workstation.
 - The server installation must be completed before the workstations can be installed.

5. For Upgrades, Verify the Correct Version is Currently Installed

Easy Dental 2005 must be installed before the program can be upgraded to Easy Dental 2008. 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 2005, all product upgrades must be installed to bring the version to Easy Dental 2005. For example, if Easy Dental 2004 is currently installed, upgrade to Easy Dental 2005 before installing Easy Dental 2008.

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. IMPORTANT! Close All Applications that are Running

Look at the Windows System Tray (normally in the bottom, right corner of the screen) and close any unnecessary programs that appear there, including the Easy Dental Time Clock. After the applications have been closed, disable the Windows screen saver. To disable the Windows screen saver, click Start, then select Control Panel, and Display. Click the Screen Saver tab, expand the Screen Saver drop-down, and select [None].

Note: After Easy Dental 2008 has been installed, enable the screen saver by following the same steps, but select a screen saver instead of selecting [None].

8. Verify the Easy Dental 2008 CD Configuration

Verify that the Easy Dental 2008 Installation CD is the right CD for the office configuration (single user or multi-user).

9. Begin the Installation

Begin the installation by following the step-by-step instructions in this document.

Note: If Easy Dental 2008 is being installed over a network, refer to the Installation Guide for instructions on installing on the workstation from the server.

10. Finish the Installation Completely

Do not interrupt the installation process, even if it looks as though nothing is happening. The installer will open a prompt when the installation is ready to continue. Terminating an installation prior to completion could affect the integrity of the database. Terminate the installation process only if you are directed to do so by Easy Dental Customer Support.

Need help? Involve an Easy Dental CIE or contact Easy Dental Customer Support by sending an email to support@easydental.com or by calling **(800) 824-6375, option 2.**

installing easy dental 2008

Please read the Tips for a Successful Installation before beginning the installation. If the program will be installed on a networked system, the following steps should be completed on the file server first.

Server Install

1. Insert CD-ROM

Insert the Easy Dental 2008 CD-ROM into your CD-ROM drive. If your computer is equipped with AutoStart technology, the Install Startup screen appears within a few seconds. If the installation does not begin, complete Steps 2 and 3. Otherwise, proceed to step 4.

2. Click Start | Run

Click the Start button and select Run. The Run dialog box appears.

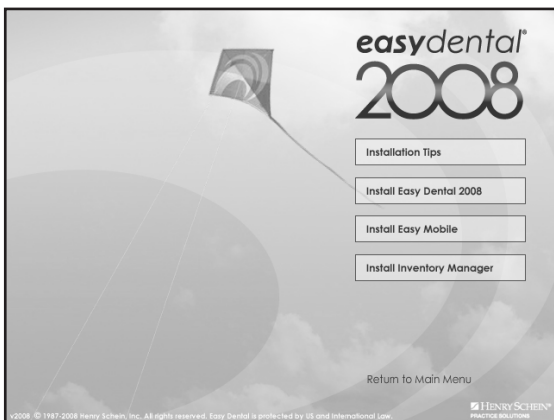
3. Type D:\Launch.exe in the Command Line

Type D:\Launch.exe in the command line (where D: is the drive letter for the CD-ROM drive). Click the OK button to begin the installation. The Easy Dental 2008 splash screen appears.



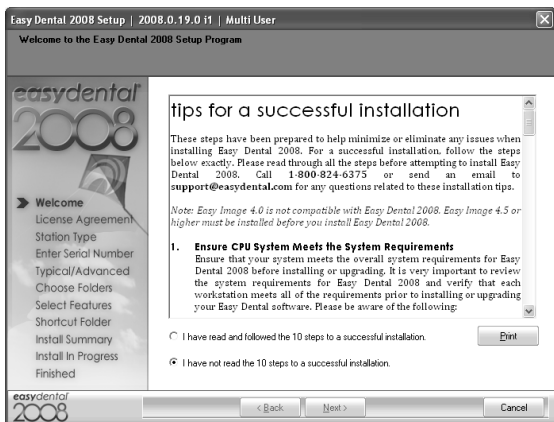
4. Click Install

Click the Install button. The Easy Dental 2008 installation screen appears.



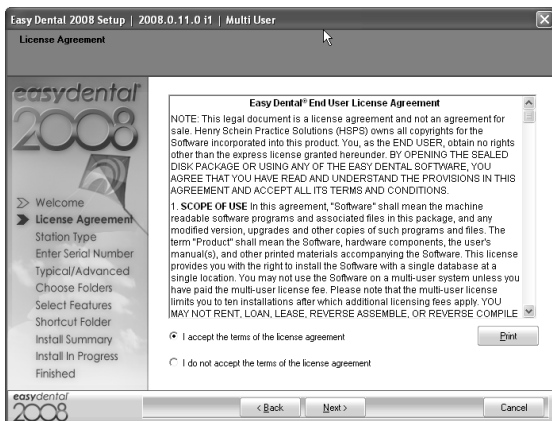
5. Click Install Easy Dental 2008

Click the Install Easy Dental 2008 button. The Installation Setup screen appears for a few moments, followed by the Welcome screen.



6. Mark "I have read and followed the 10 steps to a successful installation"

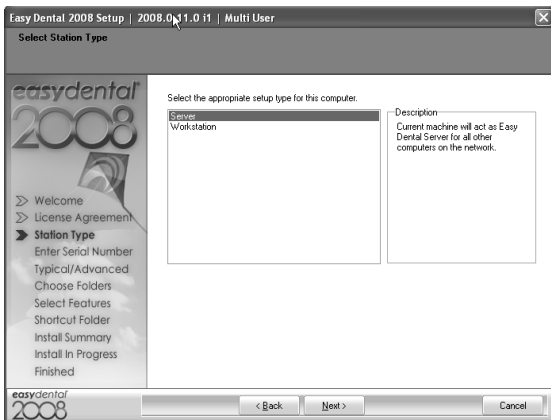
Read the Tips for a Successful Installation and mark the "I have read and followed the 10 steps to a successful installation" radio button. Then, click the Next button. The License Agreement screen appears.



7. Mark "I accept the terms of the license agreement"

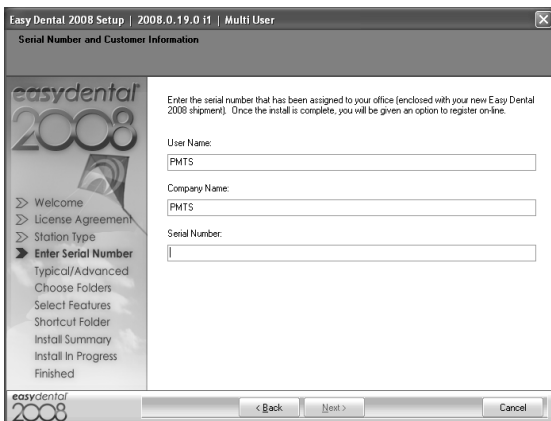
Read the Software License Agreement. Mark "I accept the terms of the license agreement" and click the Next button to continue the installation. The Station Type screen appears.

Note: If you do not agree to the terms of the license agreement, select "I do not agree with the terms of the license agreement" and click Next. The installation will be terminated.



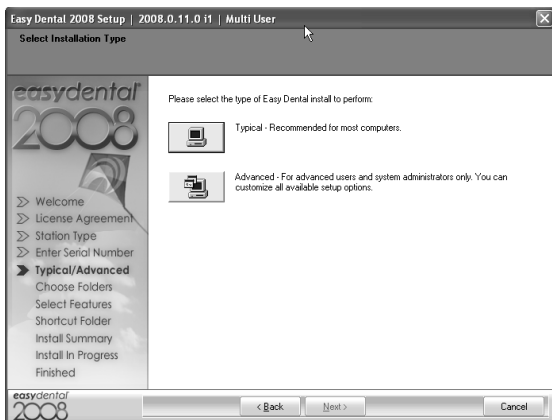
8. Select Setup Type

Highlight the setup type (Server or Workstation). Click Next to continue. The Enter Serial Number screen appears.



9. Enter User Name, Company Name, and Serial Number

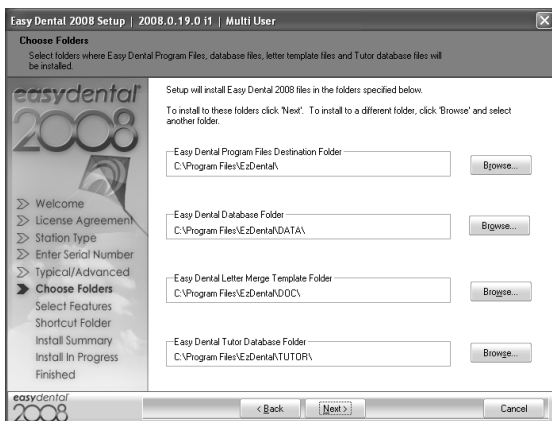
Enter the server name, the name of the company, and the serial number that was provided with the software. Click Next to continue. The Typical/Advanced screen appears.



10. Select Installation Type

You can perform one of two installation types: Typical or Advanced. The Typical installation type is recommended for most computers. During the Typical install, the directories will point to the default locations and all of the default features of Easy Dental will be installed. In the Advanced install, you can customize the locations of the directories and select which components of Easy Dental to install.

If you select Typical, proceed to Step 11. If you select Advanced, follow the following sub-steps before proceeding to Step 11.

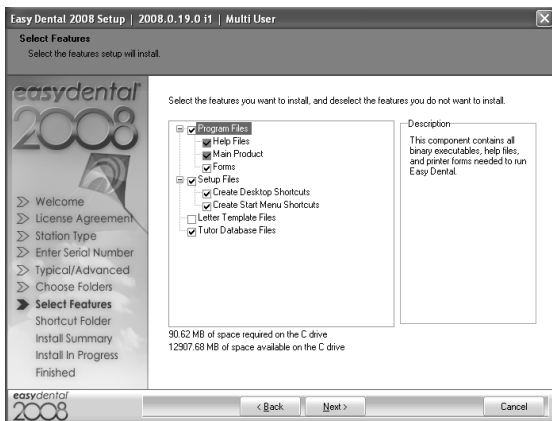


a. Verify Destination Location

The Choose Folders screen lists the destination directories for the Easy Dental 2008 components. By default, the recommended directory is selected for new users. The current location is selected for upgrading users. To change the directory, click the Browse button.

- **Program Files:** The executable files that are required to make the program run. Your program files should be stored in the place where you want your Easy Dental software to be stored. These files must be installed for all types of installations.
- **Database Files:** The files that include your patient information files and the program settings that are specific to your office. For networked versions, these files should only be installed on the file server.
- **Letter Merge Templates:** The Microsoft Word default letter templates that are used during the letter merge. These templates only need to be installed on the file server.
- **Tutor Database:** A practice database that is used for training. These files should be installed on each computer.

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 Select Features screen appears.



b. Select Features to Install

The Select Features screen lists all available features. By default, all features are checked for new users.

Note: The list of features and sub-features changes according to which component is highlighted.

- **Blank Data Files:** Check this option if this is a new installation.

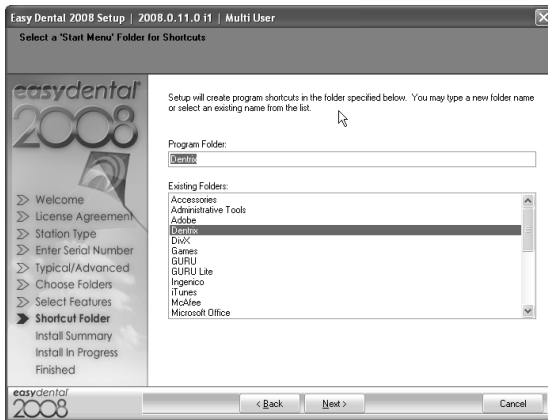
Warning: Do **NOT** check this option if you have previously entered information in Easy Dental. Checking this option when upgrading will cause any existing patient information to be overwritten and lost!

- **Tutor Data Files:** These files are helpful tutorial files used to assist in learning Easy Dental basics. Networked users should install the tutorial files on each workstation. It is recommended that existing users install a new tutorial database to replace the existing Easy Dental 2007 tutorial database.
- **Program Files:** Installs basic program files. This option must be checked in order for Easy Dental to run after the installation.
- **Setup Files:** Installs the setup files necessary to install Easy Dental at a later time if needed. These files should be checked on the server install for both new and upgrading users.

- **Letter Files:** Installs blank letter templates. New users should check this option. Upgrading users should not check this option.

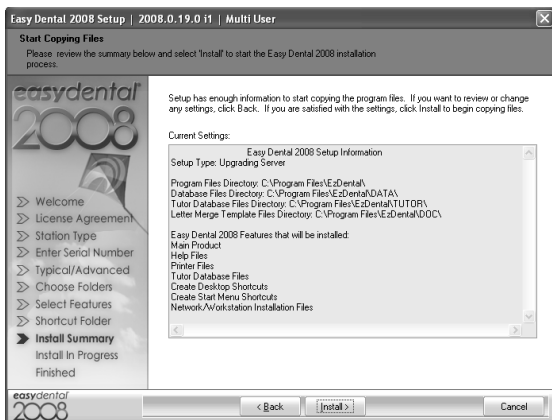
Warning: Checking this option will cause existing Easy Dental letters to be overwritten. Customizations made to letter data will be lost if Letter Files is checked.

Once all of the correct components have been selected, click Next to continue. The Shortcut Folder screen appears.



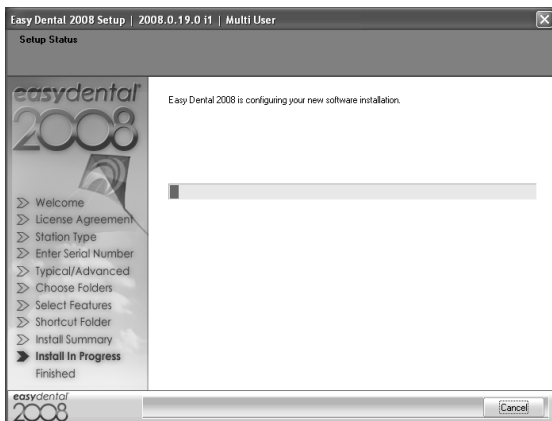
c. Select Shortcut Folder

The Shortcut Folder is the folder where the Easy Dental start menu shortcuts will be located. By default, Easy Dental will be entered in the Program Folder field. The Program Folder name can be customized by entering the desired name or selecting one from the list. Click the Next button to continue. The Install Summary screen appears.

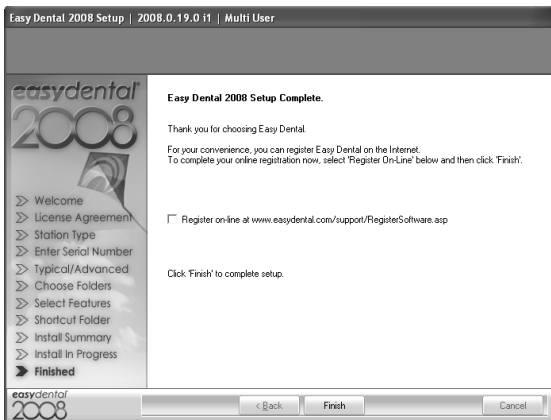


11. Start Installation

When you have selected the features to install (either by using the Typical or Advanced install), 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

Check to register your Easy Dental online and click Finish to complete the setup.

Workstation Install

1. Connect to the Easy Dental File Server

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 or your network software technical support.

2. Double Click the Setup File on the Server

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 2008 subdirectory. Double click the setup.exe file. The Easy Dental install program will start and the Welcome screen appears.

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 Steps 4 – 12 on pages 16 – 25

Follow the installation steps on pages 16 – 25.

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

Starting Easy Dental

1. Click Start

Click the Start Button.

2. Select Programs | Easy Dental

From the Start menu, select Programs, then Easy Dental. The Easy Dental Start Up screen appears for several seconds, after which Easy Dental opens.

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