

DATAGRABBER Installation Guide

Abstract

A guide to assist dental or medical care facilities with the install of the DataGrabber, Apteryx's patented practice management bridging software.



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REVISION HISTORY

Revision Level	Revision Date	Description of Revision	Effective Date	Revision Author
0.1	08/01/2011	Draft	NA	SN
1.0	08/29/2011	Initial Release	08/27/2011	KP

INTRODUCTION

Overview

DataGrabber is a bridging application located in the Windows System Tray that understands how to bridge patients from one application to another. DataGrabber works with most third-party practice management software, and will launch most third-party dental and medical imaging software.

For example, if you have patient "John Doe" open in your practice management application and then click on the icon in the system tray, DataGrabber will automatically open that patient in your medical imaging program. Using DataGrabber, the cumbersome and time consuming practice of manually starting applications, finding a specific patient and then opening that patient is automated with a single click of the mouse.

System Requirements

DataGrabber, Apteryx's patented bridge to practice management programs, is designed for Windows XP, Vista, Windows 7, Server 2003, Server 2008 operating systems including Terminal Services and Citrix.

Depending on the PM application, an ODBC Data Source may need to be specified on each workstation. Contact Apteryx, Inc at **1-877-278-3799** for consultation.

Ideal System Recommendations

- Installed Practice Management (PM) Solution
- Appropriate Apteryx DataDrill to extract patient information from PM Database
- Third Party Dental or Medical Imaging Software

Minimum System Requirements

The system must conform to the minimum requirements specified by Microsoft® for the operating system installed. At minimum, DataGrabber requires Windows® XP (SP2 or above) which has the following minimum requirements:

- 400Mhz or higher processor
- 64MB of RAM (128MB or higher is optimum)
- CD-ROM drive
- Local Area Network for networked installations (TCP/IP preferred; a 100Mbps network is optimum)
- A name-brand video capture card is required for image capture from analog video and intra-oral cameras. Digital sources typically use FireWire or USB for import.

Quick Notes Before Beginning

If you have a Server

- It is highly recommended that DataGrabber is installed on a shared drive of the Server (even if installing a trial version of the product). DataGrabber has built-in technologies that optimize the use of the application on a network and enables the software to be run from all the workstations in that network even though it is only installed in ONE (server) location.
- When installing to a Server, be sure that the software is installed on a shared drive where other workstations can access it with FULL READ/WRITE PERMISSIONS.
- It is not necessary to install DataGrabber from the target computer or network. As long as the installer has full read/write permissions, it can be installed on the server from any client workstation.

Installing to a Directory other than the Default Directory

- Create the destination folder first before running the installation.

Installing on a Network

- Due to Apteryx's unique Single Installation, Multiple Use (SIMU) technology, the software can be installed in one location, on a network, for client workstations to access. To install the software on a server/network, create the destination folder on the server and share the folder with full read/write permissions for 'Everyone' before running the installation program.

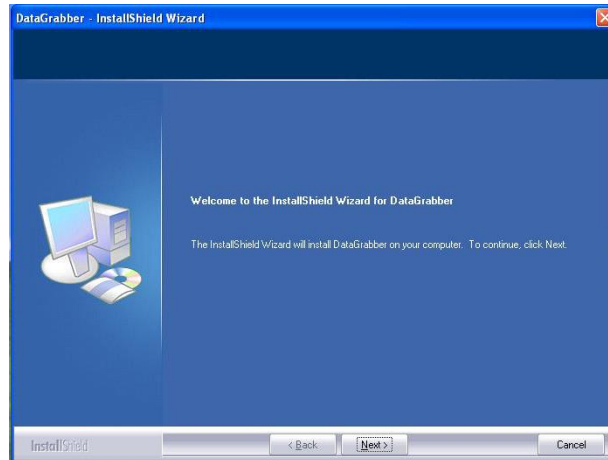
Windows Vista, Windows 7, or Windows Server 2008 Installs

- To avoid issues with the Vista/Win7/Server 2008 User Access Control (UAC) feature, Apteryx recommends running the installer programs as an Administrator by right-clicking the installer's .exe file and selecting *-Run as Administrator-*. Additionally, Apteryx recommends users avoid installing the application in the default *\program files(x86)* directory to prevent possible issues with the Windows VirtualStore feature.

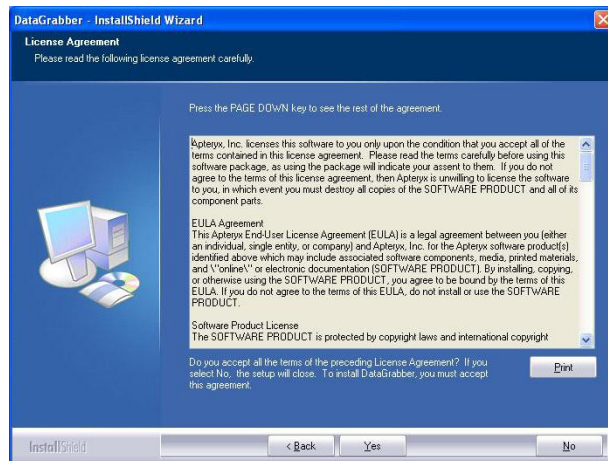
DATAGRABBER INSTALLATION

Installing DataGrabber

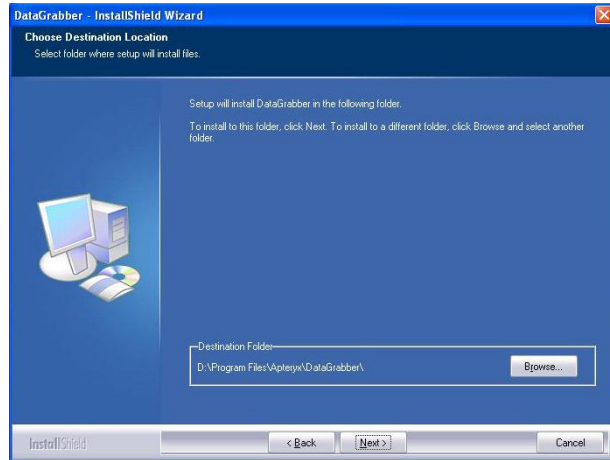
1. If installing from a CD, insert the installation CD into the CD-ROM drive. If the Windows Auto Play feature is enabled on the computer, the Setup program will automatically start. If not, use Windows Explorer to navigate to the CD drive letter and double-click on the "setup.exe" file. Skip to Step 3.
2. If installing using the self-extracting executable file, double-click on "DataGrabberInstaller.exe". Click on the **Setup** button to extract and run the installer program.
3. The DataGrabber install wizard launches. Click **Next** to continue with the installation.



4. Review the License Agreement. Click on **Yes** to accept the terms and continue with the installation.

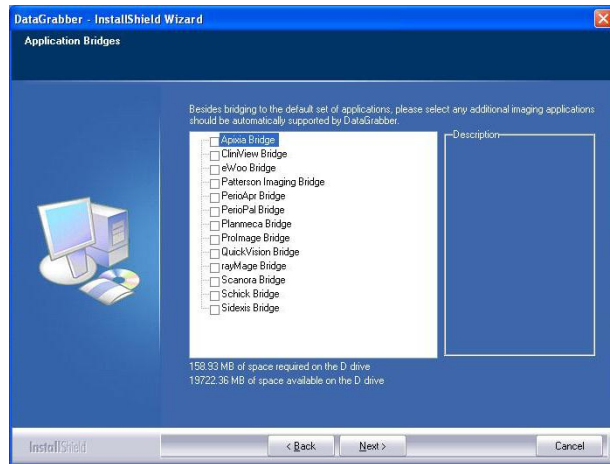


- The install program will attempt to install to the default directory, C:\Program Files\Apteryx\DataGrabber\. To choose an alternate destination folder (locally or on a network), click on the **Browse** button to open the 'Choose Folder' dialog box, and then double-click to select the desired install folder. Click **Next** to continue.



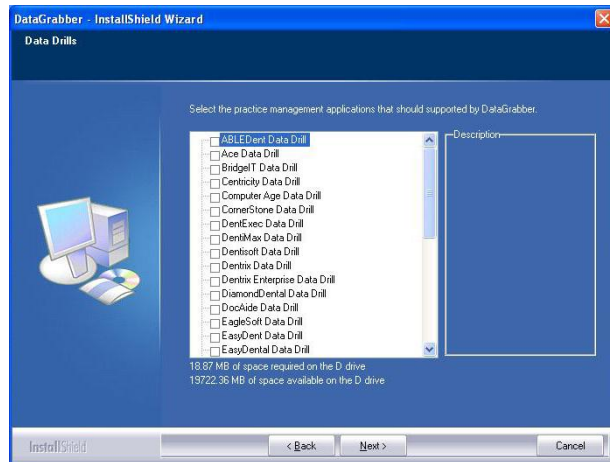
- Select the imaging software(s) to which DataGrabber will send patient information to when bridging. Click **Next** to continue.

i If the appropriate imaging software is not seen in this list, please contact Apteryx Support for further assistance.

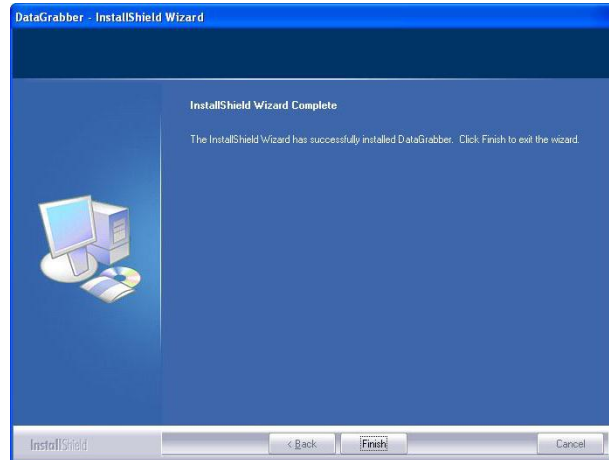


- DataGrabber supports bridging from common Practice Management (PM) applications to retrieve patient information from. Select the appropriate PM data drill and click **Next** to continue.

i The appropriate software may not necessarily be in this list, depending on whether or not the DataGrabber program requires a Data Drill for that specific PM software. If you do not find your PM software in this list, click Next to continue. You may still need to contact Apteryx Support to customize a bridge from your specific PM software version.



8. Click **Next** to continue and Next again to start the installation process. When complete, the screen shown below will display. Click **Finish** to exit the setup program.



15. To ensure that the latest version of the software and additional components are used, an upgrade is highly recommended. Follow the steps below to upgrade DataGrabber and related datadrills.

Sharing DataGrabber

The */DataGrabber/* installation folder must be shared with *Full Control* for *Everyone* on both the Sharing and Security property sections, in order for the workstations to access the necessary files.

1. Locate the Apteryx installation directory on the server. By default, the path is “*C:\Program Files\Apteryx*”.
2. Right-click on the */DataGrabber/* folder, and choose **Properties**.
3. Select the *Sharing* tab.
4. **Windows XP and Server 2003 only:**
 - a. Check the box next to **Share this folder**.
 - b. If there is an option to **Allow network users to change my files**, check this box as well.
 - c. If there is a **Permissions** button, click it, and then click **Add**. Type in the word “Everyone”, and click **OK**. Next to ‘Full Control’, check the box under **Allow**, and then click **OK**.
5. **Windows Vista, 7, Server 2008 only:**
 - a. Click **Advanced Sharing**.
 - b. Check the box next to **Share this folder**.
 - c. Click the **Permissions** button, and then click **Add**. Type in the word “Everyone”, and click **OK**. Next to ‘Full Control’, check the box under **Allow**, and then click **OK**.
6. If there is a ‘Security’ tab, click on it.
 - a. **Windows XP and Server 2003 only:** Click **Add**. Type in the word “Everyone”, and click **OK**. Next to ‘Full Control’, check the box under **Allow**, and then click **OK**.
 - b. **Windows Vista, 7, Server 2008 only:** Click **Edit**. Click **Add**. Type in the word “Everyone”, and click **OK**. Next to ‘Full Control’, check the box under **Allow**, and then click **OK** twice.

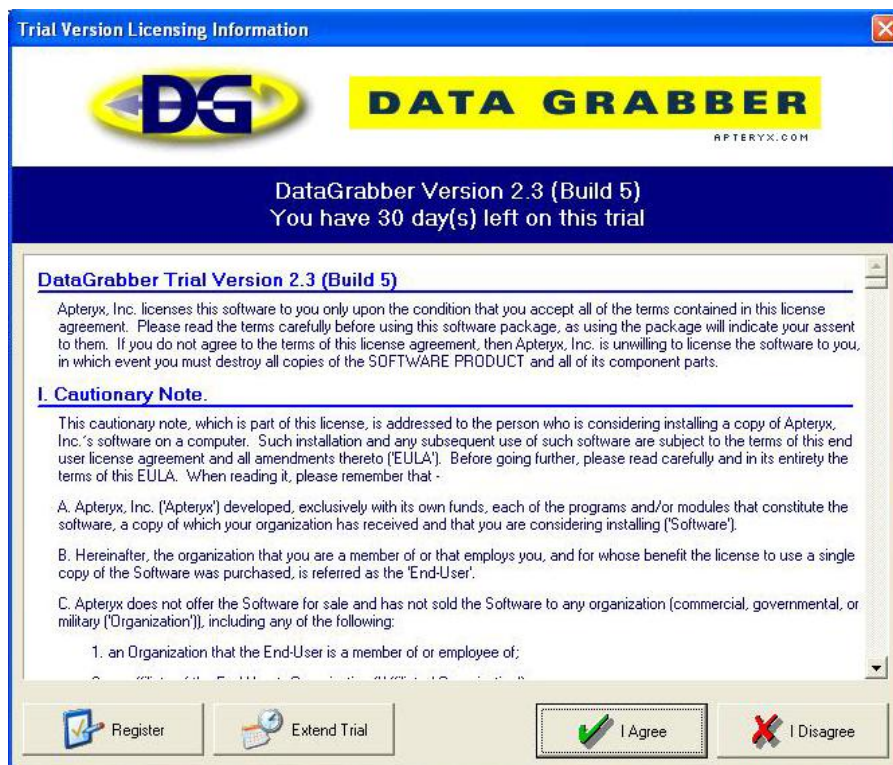
SETTING UP AND REGISTERING THE SOFTWARE

Registering the Software

If the software has not yet been registered, the application will prompt the user to register the software or run as a trial. If purchased, Apteryx provides a 24 character, alpha-numeric - registration- number that can be used to activate the software. If not, the software can be run for 30 days as a Trial Version and registered at any time.

DataGrabber uses a per-office license, i.e. one DataGrabber registration number is necessary to license an entire office to use DataGrabber on every workstation in that office. Registering the DataGrabber license only needs to be done once, and may be done on either the server or one of the workstations.

1. Depending on where the software was installed, navigate to the DataGrabber installation folder on the local computer or server (typically C:\Program Files\Apteryx\DataGrabber).
2. Double-click the DataGrabber.EXE file.
3. The Trial Version Licensing Information screen displays.



4. To run the software as a trial, select the **I Agree** button.
5. To register the software, select the **Register** button. The 'Register' dialog box displays.

Register

DATA GRABBER
APTERYX.COM

STEP 1: REGISTRATION INFORMATION

Please enter the following information in order to register this product. Your registration number can be found on either a registration card or on a label located on the CD-ROM sleeve.

Registration Number:

Install ID:

User Name:

User Company:

User Email:

User Phone:

STEP 2: ACTIVATION CODE

You may obtain your Activation Code by clicking on the "Get Activation Code" button or by visiting <http://apteryx.com/register>; both options require internet access. You may also call your Sales Representative or Apteryx Technical Support during business hours.

STEP 3: CONTINUE

- a. Enter the registration number provided (including the dashes) in the 'Registration Number' field.

i To avoid confusion, Apteryx avoids the use of the letter "O" in registration numbers. Always enter a "0" in these instances.

- b. Enter, at minimum, a first and last name in the 'User Name' field.
- c. Enter the name of the dental facility in the 'User Company' field.
- d. Enter the email address of the registered user in the 'User Email' field. (*Optional but recommended.*)
- e. Enter the phone number of the dental facility in the 'User Phone' field.
- f. Once the registration information has been entered, the user must activate the software by obtaining an Activation Code. An internet connection is required to activate the software. If connected to the internet, click on the **Get Activation Code** button.

i Refer to [How to Obtain an Activation Code if You are not Online](#) if the workstation is not connected to the internet.

6. Once the activation code has been received or manually entered, click on the **Done** button to complete the registration process.

How to Obtain an Activation Code if You're Are Not Online

If the computer you are working from is not connected to the internet, you may register your software either from another computer that is connected, or by contacting someone else who has internet access and providing them the following instructions.

1. Go to <http://www.apteryx.com/register>
2. Once opened, a registration page with information fields identical to the imaging software's registration screen will display.

3. Enter the Registration Number (including the dashes) and Install ID (which is displayed on your registration screen), as well as User Name, User Company, Email and Phone into the Registration form. It is very important to double check all numbers and letters in the Registration Code and Install ID before clicking on the **Register Now** button and obtaining your Activation Code.
4. Enter the Activation Code provided into the 'Get Activation Code' field of the imaging application's registration screen and click the **Done** button to complete the registration process.

If you are unable to activate your software or obtain an activation code, please contact your Dealer or Apteryx Technical Support during normal business hours and they will be happy to assist.

Setting up DataGrabber on a Client Workstation

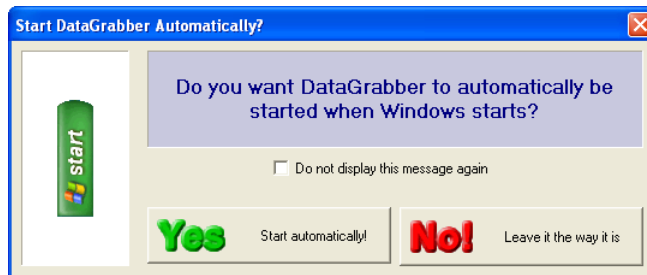
Due to Apteryx's unique SIMU technology (Single Installation, Multiple Use), DataGrabber only requires one install on a company's network. Once installed, any client workstation can automatically run the application from a shared location without performing additional installations on each computer.

A typical network installation of DataGrabber consists of installing the application on a server. Since the server is a shared resource with all of the computers on the network, each client workstation will have access to the application.

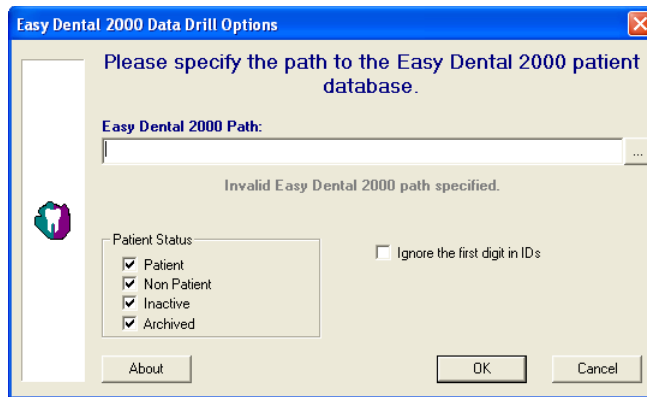
Perform the following steps on each additional client workstation to set up DataGrabber.

1. Using Windows Explorer, navigate to the installation directory on the server computer. Typically, DataGrabber installed in ...*\Program Files\Apteryx\DataGrabber* directory on the server.
2. Double-click on the **DataGrabber.exe** application file.
3. Once the application starts for the first time on the client workstation, a dialog box will display offering the choice to start DataGrabber automatically whenever Windows starts. Select the **Yes** ... button to automatically start DataGrabber.

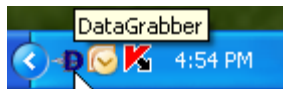
i Selecting **Yes** inserts a DataGrabber icon in the Windows Start Up menu thereby assuring the application is always launched whenever the computer is booted up and Windows starts.



4. If a practice management DG DataDrill was included during the install process, the appropriate DataDrill Options dialog box will display.



- a. Depending on the practice management (PM) software, the user may need to browse to find and select the PM database file on the server, or the database login information.
 - b. The PM software may also require that an ODBC Data Source be specified within Windows Administrative Tools on each workstation. Please refer to the Apteryx online help or contact Apteryx Support for assistance.
 - c. Once a valid database is specified, a message will indicate the number of patients in the PM database.
 - d. Click **OK** to save the settings and close the DataDrill Options dialog box.
5. Once the application launches on the client workstation, a DataGrabber icon will appear in Window's System Tray (at the bottom-right of the screen, next to the clock) indicating the application is running and ready to bridge patient information.



UPGRADING DATAGRABBER

Accessing and Running Upgraders

The latest updates for the DataGrabber application and its related PM DataDrills are available online at <http://www.apteryx.com/datagrabber/downloads/>.

Follow the directions below for upgrade instructions.

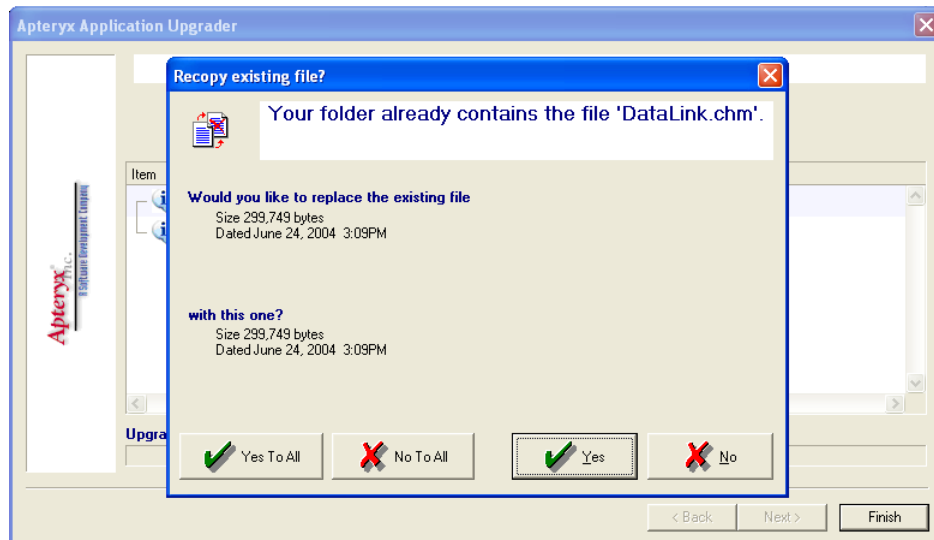
1. Close DataGrabber on any workstation running the program by right-clicking on the DataGrabber icon in the system tray and selecting **Exit**.
2. Select the appropriate links on the site above to download the required updates from the following sections of the page:
 - 'DG Updates' section:
 - DataGrabber: Download the DataGrabber application updater (not the trial version) to a known location on the computer.
 - Imaging Software Bridge: Find the appropriate bridge for the imaging software utilized at the dental facility and download it to a known location on the computer.
 - DG DataDrills: Find the appropriate datadrill for the PM application utilized at the dental facility and download it to a known location on the computer.
3. Follow the steps below to run each downloaded updater.

i To avoid issues with the Vista/Win7/Server 2008 User Access Control (UAC) feature, Apteryx, Inc recommends running installer programs as an Administrator by right-clicking the installer's .exe file and selecting **Run as Administrator**.

- a. Run the downloaded upgrader to launch the Apteryx Application Upgrader. Click **Next** to continue with the upgrade.



- b. The upgrader will automatically locate the application, whether locally or on a network, and begin the upgrade process immediately. Click **Yes to All**, whenever prompted, to replace any existing files.



- c. Click on **Finish**, when complete, to exit the upgrader.
4. After completing the upgrade, select the Windows **Start** Menu to access the **Start Up** menu group. Click on the DataGrabber icon. The DataGrabber icon will then appear in the system tray.

GETTING STARTED

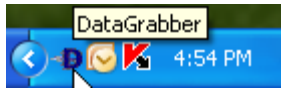
Overview

This section provides a brief explanation of how to get started using DataGrabber. More extensive help is available in the help file installed with the software. To access the installed help file, go to Windows **Start > Programs** menu and find the **DataGrabber** menu group.

If desired, training is also available through your Dealer or Apteryx, Inc.

Opening/Creating Patient Records Using DataGrabber

DataGrabber and DG DataDrills are used in tandem to grab patient information from a practice management application and automatically open an existing patient record or create the patient in the dental or medical imaging software. If the application is running, a **DataGrabber** icon will display in the System Tray as shown below.



1. Open the Practice Management screen that contains the patient information and then click on the **DataGrabber** icon in the System Tray once with the left-mouse button.

i The Patient Information screen that DataGrabber grabs information from varies from one PM application to another. If needed, contact Apteryx Support for assistance.

2. Once a name has been detected, DataGrabber launches the imaging application and a patient record is automatically created or opened (if it already existed).