

IDEXX Cornerstone*

Practice Management Software

Cornerstone* 8.4 NEXT

Installation Guide



IMPORTANT:

- Remember that you **must** complete the installation of Cornerstone* 8.4 NEXT software on your server **before** you install Cornerstone on workstations. If you have an IDEXX Digital Imaging system or are currently using the imaging module to connect Cornerstone with another imaging system, the server installation process will install IDEXX-PACS* software as a separate (but integrated) system.
- Cornerstone* 8.4 NEXT software does not allow you to create IDEXX Reference Laboratories orders on computers running the **mobile computing module**. However, you can always use IDEXX VetConnect* PLUS to place IDEXX Reference Laboratories test orders from that computer. You can then enter the charges into Cornerstone software.

For the best Cornerstone software experience, we recommend that you set up your Cornerstone software according to the [Hardware and Operating System Guidelines](#).

To see a demonstration of the installation steps, watch the [Upgrade Performance: 8.4 NEXT](#) snippet.

If you need additional help, contact IDEXX Cornerstone Customer Support at **1-800-695-2877**.

For help with IDEXX digital imaging, contact IDEXX Digital Imaging Customer Support at **1-877-433-9948**.

Confirm that your hardware and Internet browser meet specifications

- For workstations and peer-to-peer servers, we recommend a computer less than 5 years old with 4 GB of memory running the Windows* 7 Professional (or later) operating system. For more information, including details on dedicated servers and thin-client workstations, see the [Hardware and Operating System Guidelines](#).
- Make sure Windows* Internet Explorer* 8 or later is installed on each workstation. Internet Explorer is required for you to create IDEXX Reference Laboratories orders on your workstations. Internet Explorer does not have to be the default browser.

Identify your current Cornerstone version

- Go to **Help > About IDEXX Cornerstone**. The version number is at the top of the window.
- Cornerstone 8.4 NEXT software is optimized for upgrades from versions 8.2 or later. If you are on a version of Cornerstone software earlier than 8.2, please upgrade to Cornerstone* version 8.3 NEXT before attempting this upgrade. See [Prepare Your Practice for Cornerstone 8.3 NEXT](#) for information about the software updates and for training resources to help your practice get the most out of your Cornerstone software.

Estimate upgrade time

The time required to upgrade ranges from about 30 minutes to several hours, depending on your database size, Cornerstone software version, hardware, and operating systems. IDEXX recommends upgrading no more than three workstations at a time.

Prepare mobile computers

If you are using the mobile computing module:

- If you are currently using **Cornerstone 8.3 NEXT (build version 8.3.65)** or later, upgrade your mobile computers as described under “Upgrade your thick-client workstations and mobile computers.”

Tip: Mobile computers running Cornerstone 8.3 NEXT do not need to be synchronized first. However, for a smoother and more efficient upgrade we recommend that you synchronize and undo all mobile computers before upgrading.

- If you are currently using **Cornerstone* 8.3 Service Pack 5 (build version 8.3.61)** or earlier, you **must** do the following:
 1. Bring all mobile computers into the practice.
 2. Synchronize each mobile computer.
 3. Remove each mobile computer from the Mobile Computing List by selecting **Undo mobile computer**.
 4. At your practice, follow the instructions in the rest of this document to upgrade the Cornerstone software on your server and workstations (including workstations that had been mobile computers).
 5. Start the Cornerstone software on each laptop or tablet, and then create the mobile computer. Refer to the Cornerstone online help (click the **Help ?** button on the toolbar) for information on creating a mobile computer in the Cornerstone software.

CAUTION: Failure to follow the standard synchronization recommendations on all mobile devices before upgrading from a release earlier than Cornerstone 8.3 NEXT (build version 8.3.65) will result in permanent data loss.

Review and train on changes and enhancements in the new release

1. Refer to the Cornerstone 8.4 NEXT *Release Notes* to familiarize yourself with the changes in the Cornerstone 8.4 NEXT software. Share this document or the pertinent information with the staff who will use the features that have been updated.
2. If you're upgrading from Cornerstone version 8.3 (build 8.3.53) or later, you do not need to set up any new security settings for staff to use the features in the new version.

Get ready

1. If you have an IDEXX VetLab* Station connected to your Cornerstone software, shut it down.
2. Run End of Day processing.
3. Back up your Cornerstone system using your regular daily backup process.
4. Close all open programs, including Cornerstone software, on **all** computers. Leave all computers powered on and logged on to the Windows operating system.
5. If QuickBooks* software is installed on your server:
 - a. On the server, press CTRL+ALT+DELETE, open the Task Manager, and click the **Processes** tab.
 - b. Select any process that starts with the letters QB and click **End Process**; close Task Manager.
6. If Cornerstone software is connected to a workstation used for capturing images, make sure that the capture workstation remains logged on to the Windows operating system until you complete the "Upgrade the Cornerstone server" steps.

Upgrade the Cornerstone server

Remember: Install Cornerstone software on your server before you install Cornerstone on workstations.

1. Restart your Cornerstone server before continuing with the following steps.
2. After the server restarts, double-click the **Update Launcher** icon on the desktop (it may be labeled **Service Pack Launcher**). Follow the prompts to install the Cornerstone update.

OR

Insert the IDEXX Cornerstone DVD into the DVD drive; installation should start automatically. If the installation does not start automatically:

- a. Click the **Start** button and select **Run**.
- b. Type the letter of the DVD drive followed by `:\Install Cornerstone.exe` (e.g., D:\Install Cornerstone.exe), and then click **OK**.
- c. In the Cornerstone Update Available box, click **Install**.

Note: If a DVD drive is not available on the server (or stand-alone computer), you can install Cornerstone across the network from a shared DVD drive on another computer by running the setup.exe file.

IMPORTANT: If you have an IDEXX Digital Imaging system or if you're using the imaging module to connect Cornerstone with another digital imaging system, the database update and data migration happen automatically during the Cornerstone install. This may take from 10 minutes to an hour or more, depending on how many diagnostic images you have.

- During the IDEXX-PACS software installation, several black command windows may appear and may initially appear to be paused. **Do not close or type in these windows.** Processes are continuing in the background.
 - Do not install Cornerstone software or start the IDEXX-PACS software on any workstation until the steps above are complete.
 - **Remember:** You **must** be logged on to the Cornerstone server for Cornerstone to work with your digital imaging system.
3. When the installation is complete, click **Finish** to restart the server. If the server does not restart automatically within a minute or so, restart it manually.

Note: If you have not installed the latest Windows updates, the updates will be installed while the computer is shutting down and restarting. This may add a few minutes to the restarting process.

Remember: If you have IDEXX-PACS Digital Imaging Software, you **must** be logged on to the Cornerstone server for Cornerstone to work with your digital imaging system.

4. After the server has restarted, log on to the Windows operating system. The upgrade is finalized while Windows is starting; this takes 5–10 minutes.
5. To start the Cornerstone software, double-click the **Cornerstone** icon on the desktop, or go to **Start > Programs > Cornerstone > Cornerstone**.
6. If a signature-capture device is connected to the server, check the device and reset it, if needed:
- a. Go to **Tools > Signature Capture Device**, and click **Test Connection**.
 - b. If the device is connected, click **OK**; if the device is not connected, *note the current device and port number*, and then continue with **steps c** and **d**.
 - c. Change the device selection to **None**, and then click **OK**.
 - d. Go to **Tools > Signature Capture Device** again, reset all values to the original settings from **step b**, and then click **OK**.

Note: After you complete the upgrade process, the Cornerstone database and IDEXX services (related background programs) will start automatically in the background whenever you start your Cornerstone server. You won't see anything happening, and no icon will appear in the Windows system tray. You don't need to click any icons on your desktop to start the database.

Use your thin-client workstations and connected hardware and software

Once you have upgraded your Cornerstone server, you can use the Cornerstone software on any thin-client workstations in your practice, without any additional actions. You can also restart the IDEXX VetLab Station, if applicable.

If you use an IDEXX Digital Imaging system, we recommend upgrading the capture station after you upgrade the server but before you upgrade thick-client workstations.

Upgrade your thick-client workstations and mobile computers



Before you upgrade your workstations and mobile computers, make sure you have completed the Cornerstone server upgrade and have completed the installation of the IDEXX-PACS Imaging Software on the server (if included with your system), as described above.

Complete the following steps on all thick-client Cornerstone workstations; up to three workstations can be updated at the same time.

If you have an IDEXX Digital Imaging system or if you're using the imaging module to connect Cornerstone with another digital imaging system, the IDEXX-PACS software will be installed on the thick-client workstations.

If you use mobile computing, you should connect your mobile computers to your practice network and upgrade them at this time. Be sure you followed the special mobile computer instructions at the start of this document!

Notes:

- To use Install From Server, you do **not** need to be logged on as an administrator.
 - To install manually by double-clicking **setup.exe**, you must be logged on to the Windows operating system as an administrator. If the users performing the installation do not have administrator credentials, contact Customer Support for assistance.
1. On the workstation, double-click the **Cornerstone** icon on the desktop, or go to **Start > Programs > Cornerstone > Cornerstone** to start Cornerstone.
The following message appears: *The Cornerstone server is running a more recent version of Foundation than this computer. An update was found on the server. Do you wish to install it now?*
 2. Click **Yes**. The Cornerstone software closes, and the new version is installed automatically from the server using the Cornerstone Install from Server feature; you do not need to click through the usual installation wizard screens.
Note: If you click **No** when asked if you want to install the update, the Cornerstone software closes. The Cornerstone software will not run on the workstation until the system detects that the workstation version matches the server version.
 3. When the update is complete, click **Reboot Now** in the IDEXX Install from Server window to restart the workstation.
 4. If a signature-capture device is connected to the workstation, check the device and reset it, if needed:
 - a. Go to **Tools > Signature Capture Device**, and click **Test Connection**.
 - b. If the device is connected, click **OK**; if the device is not connected, *note the current device and port number*, and then continue with **steps c** and **d**.
 - c. Change the device selection to **None**, and then click **OK**.
 - d. Go to **Tools > Signature Capture Device** again, reset all values to the original settings from **step b**, and then click **OK**.



idexx.com/cornerstone

© 2015 IDEXX Laboratories, Inc. All rights reserved. • 06-0005041-03

*Cornerstone, IDEXX VetLab, and IDEXX-PACS are trademarks or registered trademarks of IDEXX Laboratories, Inc. or its affiliates in the United States and/or other countries.
Internet Explorer and Windows are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.
QuickBooks is a registered trademark of Intuit, Inc.