

ABELDent Platform Setup Conventions

1 Introduction

1.1 Purpose of this document

The purpose of this document is to provide prospective ABELDent licensees and their hardware vendors with the information that they will require to prepare for the installation and operation of ABELDent. It will start with a brief overview of typical platforms, and then provide specific information that will be required to configure an ABELDent ready platform.

The sections on configuration are moderately technical and intended primarily for the use of the hardware vendor or IT professional that will be configuring the system. They are not detailed instructions, it is expected that a competent IT professional will be familiar with these ubiquitous platforms, and understand the conventions.

If your hardware vendor needs clarification on any of the points, please have them call or email ABEL. We are happy to cooperate and work with your hardware vendor to ensure that they get all the information required to get your system setup for ABELDent.

1.2 General Platform Overview

ABELDent runs on the Microsoft Windows operating systems, and the Microsoft Jet database. ABELDent is also available using the Microsoft SQL Server 2000 database. ABELDent is designed to scale from small peer to peer networks with just a couple workstations, to larger networks in busy clinics with dedicated servers serving administrative and clinical workstations in operatories.

The smaller networks, with less than ten workstations, can be served by a workgroup consisting entirely of computers running the Microsoft Windows XP Professional operating system. In this environment the file server is typically used as a workstation.

On larger networks with 10 or more workstations, a file server with the Microsoft Windows 2003 Server operating system (or Windows 2000 Server) is required. The Windows 2003 Server operating system supports larger networks and advanced features such as Active Directory security domains, disk mirroring, terminal services, and many other features and tools. Some practices with less than 10 workstations opt for a dedicated server with the server version of the operating system in order use active directory, or disk mirroring, or other such features.

Note: SQL Server 200x **Standard Edition** will not work on a server running Windows XP.

1.3 How to proceed

ABEL recommends that when looking into purchasing your hardware, operating system, and other software for ABELDent that you get at least three quotes. Please make sure that you provide the ABELDent recommended hardware requirements, and these setup conventions, so that the hardware vendor can include setup to these conventions in the price that you are quoted. Current hardware requirements are always available on the ABEL website <http://www.abeldentalsoftware.com>. Some customers opt to purchase their own hardware from vendors that do not provide setup and installation services. In such cases you are likely to require the services of an experienced technical person who can understand these setup conventions and configure the system(s) in conformance with the conventions.

If you are dealing with a hardware vendor that you have not worked with in the past, ABEL recommends checking references. In many areas ABEL can provide the names of hardware vendors who have prepared ABELDent systems in the past.

ABELDent Platform Setup Conventions

2 Server Setup Conventions

2.1 Operating system

2.1.1 Windows XP Professional File Server

2.1.1.1 Setup

Please conform to the following conventions when setting up the Windows XP Professional File server

- We recommend an NTFS file system.
- Setup TCP/IP as the network protocol. We normally configure TCP/IP to obtain an IP automatically. ABEL recommends a router with a firewall on all high-speed Internet connections. The router if available usually does DHCP. If there is not a router, XP will use Automatic Private IP Addressing (APIPA).
- Name the computer with the customer's ABEL client ID number. For example if the ABEL customer ID number is CØ9999-ODG, name the server CØ9999. You can get the customer ID number by calling ABEL's production department and asking for it.
- TURN OFF simple file sharing. Open My computer > Tools >Folder Options >Go to the view Tab>Uncheck simple file sharing.
- While you are here also uncheck "Hide extensions for known file types".
- Create an account for ABELDent users. An account can be set up for each user, but you should be aware that this account would have to be set up on all client machines from which the user will be running ABELDent. This will require a little more ongoing maintenance to administer the accounts when you have staff changes. It is up to individual customers to decide what is best for their practice.
 - The ABELDent users should not be part of the administrator group; they should be part of the user group.
 - Ensure that each account has a password. The users should change their password the first time they log in.
- Disable the guest account.
- Put a password on the administrator account. Make sure that the appropriate person at the office or clinic has this password. Normally the dentist, office manager, or IT person.
- If the customer will not have Internet access, then install and configure Routing and Remote Access Server (RRAS) so that ABEL will have a means of accessing the machine, should the customer need support. Install pcAnywhere if the customer has purchased it to facilitate support. If a customer does not have pcAnywhere, enable Remote Desktop access to facilitate remote support by ABEL. Enable Remote Assistance if the machine will have an Internet connection and an email account (or msn messenger) to convey the request for help.

Steps to configure RRAS

- Setup modem
- Network connections>Create a new connection>Wizard starts>Next>Setup an Advanced connection>Next>Accept Incoming connections>Next>Select modem>Next> Select do not allow virtual private connections>Next>Select the ABEL support user > Next >Check TCP/IP>Next>Finish

ABELDent Platform Setup Conventions

- Create an account for ABEL to use if they have to log in to provide support for the product. Please contact ABEL directly to provide the username and password. Make sure that the ABEL user has dial-in permissions and is part of the users group.
- Set the display resolution to at least 1024x768.
- Install the most recent operating system service pack, and all critical patches and hotfixes from Microsoft.
- Turn off any CPU power savers. Display power savers should be fine, but refrain from using third party screensavers. Turn off Hibernation.
- Install the latest drivers for all printer(s).
- Install and configure any required tape backup drivers and programs. ABEL recommends the backup program that comes with Windows XP Professional. Shortcuts should be setup on the desktop for appropriate users, to:
 - The backup program, to facilitate ASR (Automatic System Recovery) backups,
 - Perform a Full System backup with System State,
 - Data only backups. This will have to be setup after ABELDent is installed. ABEL recommends that the ABELDent folder and its sub-folders be backed up.

Note: A regular user will not have appropriate privileges to perform full system backups; any users that perform backups will have to be added to the Backup Operator's group.

- A backup schedule can also be set. Most customers will have enough space available on tape to perform a full backup with system state on a daily basis. This is recommended for small offices without an on-site IT person to ensure that all data from all applications is backed up. More sophisticated backup rotations can be set up if and when space becomes an issue.
- If the customer has a high speed always on Internet connection it is recommended that Automatic Updates be turned on.
- Turn off unnecessary Services such as Messenger, IIS (If it will not be needed) and FTP. If using these services do not allow anonymous access. Note that some practices use ABEL's case presentation software & will need IIS.
- Install and configure a reputable Antivirus Product. Set it up to automatically get updates regularly. It should be configured for Real-time scanning and for at least 1 full disk scan per week. Some products require that ABELDent be added to exceptions.

2.1.1.2 Testing

- If there is no Internet connection, test RRAS by calling in via the modem using Dialup Networking.
- Test Remote Assistance, Remote Desktop Sharing, or pcAnywhere.
- Test Windows printing.

2.1.2 Windows 2003 Server

2.1.2.1 Setup

Please conform to the following conventions when setting up a Microsoft Windows 2003 Server.

- We recommend that an Active directory domain be set up.

ABELDent Platform Setup Conventions

- We recommend an NTFS file system.
- Setup TCP/IP as the network protocol. Configure a DHCP server to assign the IP addresses if there is no Router. ABEL recommends a router with a firewall on all high-speed Internet connections. The router if available usually does DHCP.
- Name the computer with the customer's ABEL client ID number. For example if the ABEL customer ID number is CØ9999-ODG, name the server CØ9999. You can get the customer ID number by calling ABEL's production department and asking for it.
- An Active directory domain is normally set up if using Windows 2003 Server. With AD, user accounts only have to be set up on the server, not on each workstation.
- Create an account for each user.
- Ensure that each account has a password. The users should change their password the first time they log in.
- Disable the guest account.
- Put a password on the administrator account. Make sure that the appropriate person at the office or clinic has this password. Normally the dentist, office manager, or IT person.
- If the customer will not have Internet access, then install and configure Routing and Remote Access Server (RRAS) so that ABEL will have a means of accessing the machine, should the customer need support. Install pcAnywhere if the customer has purchased it to facilitate support. If a customer does not have pcAnywhere, enable Remote Desktop access to facilitate remote support by ABEL. Enable Remote Assistance if the machine will have an Internet connection and an email account (or msn messenger).
- Create an account for ABEL to use if they have to log in to provide support for the product. Please contact ABEL directly to provide the username and password. Make sure that the ABEL user has dial-in permissions and is part of the users group.
- If ABELDent will ever be run on the server set the display resolution to at least 1024x768.
- Install the most recent operating system service pack, and all critical patches and hotfixes from Microsoft.
- Turn off any CPU power savers. Display power savers should be fine, but refrain from using third party screensavers. Turn off Hibernation.
- Install the latest drivers for all printer(s).
- Install and configure any required tape backup drivers and programs. ABEL recommends the backup program that comes with Windows 2003. Shortcuts should be setup on the desktop for all users, or appropriate users, to:
 - The backup program, to facilitate ASR (Automatic System Recovery) backups,
 - Perform a Full System backup with System State,
 - Data only backups. This will have to be setup after ABELDent is installed. ABEL recommends that the ABELDent folder and its sub-folders be backed up.

Note: A regular user will not have appropriate privileges to perform full system backups; any users that perform backups will have to be added to the Backup Operator's group.

- A backup schedule can also be set. Most customers will have enough space available on tape to perform a full backup with system state on a daily basis. This is recommended for small offices without an on-site IT

ABELDent Platform Setup Conventions

person to ensure that all data from all applications is backed up. More sophisticated backup rotations can be set up if and when space becomes an issue.

- If the customer has a high speed always on Internet connection it is recommended that Automatic Updates be turned on.

- Setup the group policy to:

Note: This is an optional step to enhance security logs.

- Audit successful and unsuccessful account login events,
 - Audit successful and unsuccessful account management events,
 - Account lockout to 3 invalid lockout attempts, and the lockout duration to 3 days (4320 min), and the reset account lockout counter to 1 day (1440 min).
- Turn off unnecessary Services such as Messenger, IIS (If it will not be needed) and FTP. If using these services do not allow anonymous access. Note that some practices use ABEL's case presentation software & will need IIS.
 - Install and configure a reputable AntiVirus Product. Set it up to automatically get updates regularly. It should be configured for Real-time scanning and for at least 1 full disk scan per week. Some products require that ABELDent be added to exceptions.

2.1.2.2 Testing

- If there is no Internet connection, test RRAS by calling in via the modem using Dialup Networking.
- Test Remote Desktop Sharing or pcAnywhere.
- Test Windows printing from all workstations, to all printers to which they will need to print.

2.2 Database

2.2.1 Microsoft Jet Database

The Jet Database is installed automatically along with ABELDent.

2.2.2 Microsoft SQL Server 2000

Install MS SQL Server 2000 if the customer has purchased Microsoft SQL Server 2000 Standard Edition or SQL Server 2000 that comes with the of MS Small Business Server Premium Edition. Remember to install all Service packs and hotfixes for Microsoft SQL Server 2000. ABELDent uses Windows authentication.

If the customer will be using the free MSDE version that comes bundled with ABELDent then the ABELDent installation will also install SQL Server.

The ABELDent installation will create the required databases and create a shortcut, under Start>Programs>ABELDent Administration. This shortcut will run a script to automate the creation of typical maintenance schedules and backup jobs.

ABELDent Platform Setup Conventions

3 Client Machine Setup

3.1 Windows XP Professional client machine

3.1.1 Setup

Please conform to the following conventions when setting up Windows XP Professional client machines:

- We recommend an NTFS file system.
- Setup TCP/IP as the network protocol. We normally configure TCP/IP to obtain an IP automatically. ABEL recommends a router with a firewall on all high speed internet connections. The router usually does DHCP if there is a high speed Internet connection. If there is not a router, XP will use Automatic Private IP Addressing (APIPA).
- Name the computer with the customer's ABEL client ID number followed by a hyphen and a numeric extension. For example if the ABEL customer ID number is CØ9999-ODG, name the first client machine CØ9999-1, the second client machine CØ9999-2, and so on...
- TURN OFF simple file sharing. Open My computer > Tools >Folder Options >Go to the view Tab>Uncheck simple file sharing. While you are here also uncheck "Hide extensions for known file types".
- Create account(s) for ABELDent users. The Account names and passwords must exactly match the account(s) created on the server.
 - The users should not be part of the administrator group, they should be part of the Users group.
 - You can create a group for ABELDent users but on most systems, all regular users will be ABELDent users so the regular users group can be used instead.
 - Ensure that each account has a password. The users should change their password the first time they log in. (this will have to be done for each user on all machines).
- Disable the guest account.
- Put a password on the administrator account. Make sure that the appropriate person at the office or clinic has this password. Normally the dentist, office manager, or IT person.
- Set the display resolution to at least 1024x768.
- Install the most recent operating system service pack, and all critical patches and hotfixes from Microsoft.
- Turn off any CPU power savers. Display power savers should be fine, but refrain from using third party screensavers.
- Install the latest drivers for all printer(s).
- If the customer has a high speed always on Internet connection, it is recommended that Automatic Updates be turned on.
- Turn off unnecessary Services such as Messenger, IIS (If it will not be needed) and FTP. If using these services do not allow anonymous access. Note that some practices use ABEL's case presentation software & will need IIS.
- Install and configure a reputable AntiVirus Product. Set it up to automatically get updates regularly. It should be configured for Real-time scanning and for at least 1 full disk scan per week. Some products require that ABELDent be added to exceptions.

ABELDent Platform Setup Conventions

3.1.2 Testing

- Test Windows printing from all workstations.
- Make sure that the client machine can connect to the server and access shares created on the server. If you create test shares, please remember to remove them when you are through.