IDEXX **Cornerstone***
Practice Management System

Cornerstone 8.1 Installation Guide

IDEXX
L A B O R A T O R I E S

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Contents

1: Introduction

Welcome!

Welcome to the new release of the IDEXX Cornerstone* 8.1 Practice Management System. This release includes a number of user-requested enhancements, ease-of-use improvements and new functionality to help grow your practice.

New Features in Cornerstone 8.1

- **Vital Signs** – Staff can now record vital signs and access them throughout Cornerstone in all areas where patient weight has traditionally been displayed. This allows you to review all historical vital signs in one location and easily identify changes in a patient's health through comparative trending and graphing.

- **Signatures on Estimates** – Helping you move toward a paper-light practice, Cornerstone 8.1 allows clients to view an on-screen estimate and electronically sign the estimate using a supported signature capture device or tablet PC.

- **Payment Solutions** – Offering a simple and secure solution for integrated credit card processing, Cornerstone 8.1 works with a third-party payment processing software provider to process credit and debit card transactions through an Internet connection.

- **Laboratory Features** – Several new laboratory features improve the way you view and manage results and requests in Cornerstone—generate or schedule laboratory call backs on the Daily Planner's new Diagnostics tab, and save time by viewing a single IDEXX Lab Report that includes all results for a laboratory request. Cornerstone 8.1 also includes support for the IDEXX ProCyte Dx* Hematology Analyzer.

- **Imaging Enhancements** – Cornerstone 8.1 helps increase integration within the practice, allowing practitioners to manage multiple modalities and centrally store all patient imaging information, such as ultrasound and digital dental. The release also introduces an improved radiology log based on AAHA standards.

- **System Support** – Cornerstone 8.1 supports the Windows® 7 Professional 64 bit and Windows Server® 2008 R2 Standard and Enterprise operating systems.

- **Other Features** – Additional enhancements include the ability to void a medical note; print a practice logo on estimates, invoices and statements; include pet pictures on IDEXX Reminder Service cards; and more.

Getting Started

To help ensure a smooth transition to your new IDEXX Cornerstone 8.1 Practice Management System, we recommend using the following resources in the order listed below.

1	**Release Implementation Plan**	Get started by reviewing a checklist of all pre-installation tasks to help you prepare for and take advantage of the new features in this release.
2	**IDEXX Cornerstone 8.1 Highlights**	This overview presentation walks you through the new features and enhancements in Cornerstone 8.1, highlighting improvements for everyone on your team.
3	**What's New**	View detailed information on setting up and using the new features and functionality in this release.
4	**Installation Guide (this document)**	Review hardware/operating system guidelines and follow the recommended steps for installation.
5	**Release Implementation Plan**	Reference this plan once again to review post-installation tasks, including security setup and defaults configuration.

These resources are available on the Cornerstone Resource CD, which is included in your Cornerstone 8.1 installation/upgrade package. To locate these resources on the CD, go to the **Upgrading Cornerstone** area, then select the appropriate "upgrade path" for your practice.

2: Hardware and Operating System Guidelines

For optimal Cornerstone performance, please ensure that your system meets the recommended specifications provided in this chapter. This will ensure the best possible operating speed and level of efficiency when using the Cornerstone Practice Management System.

Note: Cornerstone software may function when using a computer with less than the recommended specifications. If concerned that your current system may not operate at expected levels of performance, please contact IDEXX Cornerstone Support at 1-800-695-2877.

General Recommendations

Business Class Computers, Printers and Peripherals	IDEXX recommends business class computers, printers and peripherals to ensure the best performance, reliability and warranty. Business class devices are available from manufacturers like Dell™ and include components, configuration options and a warranty designed to meet the needs of a demanding business environment.
Network	IDEXX recommends computers and switches capable of Gigabit speed with a wired connection. (A wired connection will always provide a faster and more stable Cornerstone experience.) A wireless connection should be used only for mobile computers.
Antivirus (Malware Protection)	IDEXX recommends antivirus software that does not use a software firewall (or offers the option of turning off the software firewall). For security purposes, IDEXX recommends a hardware firewall (included with most routers) instead of a software firewall.
Monitor Resolution	IDEXX recommends 1024×768 or 1280×800 resolution for optimal viewing of the Cornerstone software.
Cornerstone Backup Verification Assistant	The Cornerstone Backup Verification Assistant requires one of the following types of backup software: Backup4all, Backup Exec™, Backup MyPC™, PC Backup, TapeWare® or IDEXX VetVault* Backup Solution.
Windows 98 and Windows NT	Cornerstone software will not install on a computer that uses Windows® 98 or Windows® NT operating systems. If your practice still uses Windows 98 or Windows NT, please call 1-800-283-8386, option 2, to discuss your upgrade options.
Windows Vista Business 32 bit and Ultimate 32 bit	Windows Vista® requires Cornerstone 7.6 or later for workstations and Cornerstone 8.0 or later for peer-to-peer servers.
Windows 7 Professional 64 bit and Windows Server 2008 R2	Windows® 7 and Windows Server® 2008 R2 require Cornerstone 8.0 Service Pack 2 or later. **Note:** Some compatibility issues have been identified for using certain third-party applications and devices with these operating systems. PDF documents detailing these issues are available on the **Specifications & Hardware** tab at idexx.com/cornerstonespecifications.

Hardware and Operating System Recommendations

Peer-to-Peer Servers and Stand-Alone Computers

Peer-to-Peer Servers allow up to 6 thick-client workstations and run a non-server operating system.

Operating System	° Windows XP Professional ° Windows 7 Professional 64 bit
Processor	Multi-core Intel® processor or AMD processor†
Hard Drive	250 GB
Memory	2 GB
Backup Device	° DVD-RW ° Removable Disk Drive (RD1000) ° IDEXX VetVault

† Excluding Intel® Celeron® and AMD Sempron™ processors

Dedicated Servers

Dedicated Servers allow for 7 or more workstations and run a server operating system. A Dedicated Server should not be used as a Cornerstone workstation.

Operating System	° Windows Server 2003 ° Windows Server 2008 R2 Standard/Enterprise
Processor	Multi-core Intel Xeon or AMD Opteron
Hard Drive	250 GB‡
Memory	4 GB§
Backup Device	° Tape Backup (LTO) ° Removable Disk Drive (RD1000) ° IDEXX VetVault

‡ Servers that will be storing digital images may require more hard drive and backup space depending on usage.

§ Servers that will be running Remote Desktop Services (formerly known as Terminal Services) may require more memory depending on usage and the number of thin-client workstations.

Thick-Client Workstations (Including Laptop and Tablet Computers)

Thick-clients are workstations that run Cornerstone locally.

Operating System	° Windows XP Professional ° Windows 7 Professional 64 bit
Processor	Multi-core Intel processor or AMD processor††
Hard Drive	60 GB
Memory	2 GB

†† Excluding Intel Celeron and AMD Sempron processors

Thin-Client Workstations

Thin-clients, also known as terminals, are workstations that run Cornerstone on the server using a Remote Desktop Connection. Thin-clients are not recommended for viewing digital images.

Operating System	◦ Windows XP Embedded or Windows XP Home ◦ Windows 7 Home Premium
Processor	Intel Celeron, Intel Atom™ or AMD Sempron
Memory	512 MB

> **Tip:** For updates on Cornerstone system recommendations, go to idexx.com/cornerstonespecifications and select the **Specifications & Hardware** tab.

Evaluating Your Current System Configuration

If you are using a Dell computer system, we provide access to Dell's online tool to quickly analyze your system and help you determine if your system meets the hardware requirements for this release of Cornerstone software.

To use this tool, look for the **Dell System Analyzer** link located within the *Evaluating your system configuration* section on the **Specifications & Hardware** tab at idexx.com/cornerstonespecifications.

Tracking Your Hardware and Software Performance

The IDEXX Monitor* Cornerstone* Dashboard report tracks hardware and software performance to help practices ensure that Cornerstone operates smoothly and efficiently. The Cornerstone Dashboard report is a free monthly report available to IDEXX Cornerstone users who have enabled the data services agreement in Cornerstone (on the **Tools** menu, select **Data Services Agreement**).

To register for the IDEXX Monitor Cornerstone Dashboard report or for more information, call 1-888-557-6517.

3: Pre-Installation Information

Installation Notes

- Installation may take from several minutes to over an hour, depending on your computer configuration, database size and current Cornerstone version.

- If you are upgrading from an **older version prior to Cornerstone 5.6**, call IDEXX Cornerstone Support (1-800-695-2877) to receive alternate upgrade instructions.

- If you are using the **Mobile Computing module**, see "6: Installation for the Mobile Computing Module" on page 19 in this guide.

- Note that End of Day processing may take longer than usual the first time it is run following the installation of your new release of Cornerstone software.

Laboratory

- If your practice uses the **IDEXX SmartLink* In-House Laboratory module**, you must shut down the IDEXX VetLab* Station and all other connected analyzers before installation.

- On the **IDEXX VetLab Station 3.10 and above**, in the **Practice Management** tab's *Transmit Results* area, select the **On (Transmit result records and report)** option. This will set the IDEXX VetLab Station to transmit both result records and their associated IDEXX Lab Report to the Cornerstone software. (See the *Cornerstone 8.1 What's New* document for more information.)

- For practices that use the following **in-house laboratory** devices with a serial connection, follow the applicable steps before installation:
  (These instructions do not apply to practices that have the IDEXX VetLab Station with IDEXX SmartLink technology.)

  - **IDEXX LaserCyte* Hematology Analyzer** – Close Vetcom32 on the Cornerstone Lab workstation (CTRL+ALT+DELETE to start Task Manager > **Processes** tab > select **Vetcom32.exe** > click **End Process**).

  - **IDEXX VetTest* Chemistry Analyzer** – Close Vetcom32 on the Cornerstone Lab workstation (CTRL+ALT+DELETE to start Task Manager > **Processes** tab > select **Vetcom32.exe** > click **End Process**).

  - **Abaxis**® **VetScan**® **Analyzer** – Close Vsccom32 on the Cornerstone Lab workstation (CTRL+ALT+DELETE to start Task Manager > **Processes** tab > select **Vsccom32.exe** > click **End Process**).

Imaging

- If your practice has the **IDEXX Computed/Digital Radiography module**, please do the following on the workstation that is connected directly to your IDEXX Digital Imaging System:
  1. Open the lib folder within your Cornerstone directory (e.g., C:\Cstone\lib).
  2. Make a copy of the **CaptureWorkflow.properties** file. (Right-click the file, select **Copy**, then go to your Windows desktop, right-click and select **Paste**.)

- The ability to create patient CDs, archive images to a CD or export cases to CD (Diagnostic Imaging module only) requires Microsoft .NET Framework 3.5 Service Pack 1, which is available in Windows® XP Service Pack 2 or Windows Server® 2003 Service Pack 2 or later operating systems.

  If necessary, Windows XP and Windows Server 2003 can be upgraded to the latest service pack through Windows Update. With the latest Windows service pack installed, you can then download [Microsoft .NET Framework 3.5 Service Pack 1](#) (also available at idexx.com/microsoftnet).

Disabling the Windows Firewall

Before installation, verify that the Windows Firewall has been disabled.

Notes:

- A hardware firewall (router) is recommended in place of a software firewall.

- The following instructions assume the Windows Start menu and Control Panel are set to Classic View/Small Icons mode.

To disable the Windows Firewall in Windows XP:

1. Click **Start > Settings > Control Panel**.

2. Double-click **Windows Firewall**.

3. Select **Off (not recommended)**.

4. Click **OK** and close the Control Panel.

5. Disable any other firewall software.

To disable the Windows Firewall in Windows Vista:

1. Click **Start > Settings > Control Panel**.

2. Double-click **Windows Firewall**.

3. Click **Change Settings**.

4. In the Windows Firewall Settings window, click **Off (not recommended)** and click **OK**.

5. Close the Windows Firewall window and close the Control Panel.

6. Disable any other firewall software.

To disable the Windows Firewall in Windows 7 and Windows Server 2008 R2:

1. Click **Start > Control Panel** and then click **Windows Firewall**.

2. Click **Turn Windows Firewall on or off**.

3. In the *Home or Work (Private) network location settings* section and/or the *Domain network location settings* section, click **Turn Off Windows Firewall (not recommended)**.

   Note: If the options are grayed out, ensure that **Turn Off Windows Firewall (not recommended)** is selected and continue to the next section.

4. Click **OK**.

5. Close the Windows Firewall window and close the Control Panel.

6. Disable any other firewall software.

Disabling User Account Control

For Windows Vista, Windows 7 and Windows Server 2008 R2 operating systems, before installation, verify that User Account Control has been disabled.

Note: The following instructions assume the Windows Start menu and Control Panel are set to Classic View/Small Icons mode.

To disable User Account Control in Windows Vista:

1. Click **Start > Settings > Control Panel**.

2. Double-click **User Accounts**.

3. Click **Turn User Account Control on or off**.

4. Click **Continue** at the User Account Control prompt.

5. Uncheck **Use User Account Control (UAC) to help protect your computer**.

6. Click **OK** and restart the computer.

To disable User Account Control in Windows 7 and Windows Server 2008 R2:

1. Click **Start > Control Panel** and then click **User Accounts**.

2. Click **Change User Account Control settings**.

3. Slide the adjustment bar to **Never notify**.

4. Click **Yes** at the **User Account Control** prompt.

5. Click **OK** and click **Yes! Restart the computer**; otherwise, restart the computer manually.

Changing to Install Mode (Windows 2000 Server and Windows Server 2008 R2)

In Microsoft® Windows Server® operating systems, **install mode** is used to install applications and software, and **execute mode** is used to run those applications and software. If you are installing on Windows 2000 Server or Windows Server 2008 R2, you must change to install mode before installing Cornerstone 8.1.

To change to install mode for Windows 2000 Server and Windows Server 2008 R2 installations:

1. Click **Start > Run**.

2. Type **change user /install**. (Note: There is one space between "user" and "/".)

3. Click **OK**.

Steps to Take Before You Begin the Installation

1. Review the *Cornerstone 8.1 Release Implementation Plan* (on the Cornerstone Resource CD) for important steps that should be taken before installing Cornerstone 8.1.

2. If you are upgrading from Cornerstone 7.6 and you plan to install on a Windows Vista workstation, you need to uninstall the Cornerstone PDF Printer prior to installing Cornerstone 8.1. To uninstall, go to **Control Panel** (in Classic View) **> Programs and Features >** select the **Cornerstone PDF Printer** and click the **Uninstall/Change** button.

3. If you are using the Mobile Computing module, bring in and synchronize your mobile computers. (See "6: Installation for the Mobile Computing Module" on page 19 in this guide for more information.)

4. Run End of Day processing and perform your backup.

5. Close any programs that are open, including Cornerstone, on all computers.

6. Close the Cornerstone database engine on the server by right-clicking on the **SQL** icon in the notification area on your taskbar and selecting **Exit**.

   Note: To verify the database is closed (in the event the icon is not present), press CTRL+ALT+DELETE and then click **Task Manager**. On the **Processes** tab, select the **dbsrv7.exe** process in the list (for a stand-alone system, select **dbeng7.exe**), click **End Process**, and then click **Yes**.

   A message may appear stating that one or more connections are open and verifying that you wish to close the database anyway. If you have verified that Cornerstone has been closed on all computers, click **Yes**.

4: Installation on a Server or Stand-Alone Computer

Installing Cornerstone 8.1

The steps in this section apply to the following installation environments:

- Server
- Remote Desktop Services/Terminal Services server
- Stand-alone computer

If you have more than one computer on your Cornerstone network, install Cornerstone 8.1 on the server first. See "5: Installation on Workstations" starting on page 14 for information on the proper installation procedures for Cornerstone workstations.

1. Insert the IDEXX Cornerstone CD in the CD-ROM drive. If a CD-ROM drive is not available or is not currently functioning, Cornerstone can be installed across the network by running the setup.exe file from a shared network folder.

    If the CD does not automatically start, click the **Start** button and select **Run**. Type the letter of the CD-ROM drive followed by **:\setup.exe** (e.g., d:\setup.exe) and click **OK** to open the install program.

2. An Install IDEXX Cornerstone message asks whether you want to install Cornerstone now. Click **Yes**.

    The Extract Cornerstone Setup window appears and displays its progress while extracting the Cornerstone installation files.

3. When the Welcome window appears, click **Next**.

4. Click **I accept the terms of the license agreement** to accept the software license agreement, and then click **Next**.

5. On the Activation Key – Edit Data window, do one of the following:

    - *For upgrades:* If you are upgrading from a prior version of Cornerstone, the Clinic ID and Key will be filled in automatically. Click **Next**.

    - *For new installations or installations with a new key:* If Cornerstone has never been installed on this computer before, type your Clinic ID and Key and click **Next**.


Activation Key – Edit Data window

6. If you are installing a multi-computer system, the Setup Type window appears. On the Setup Type window, do one of the following:

- *For upgrades:* If you are upgrading from a prior version of Cornerstone, the installation type will be selected for you automatically. Leave this selection at its auto-detected setting and click **Next**.

- *For new installations:* If Cornerstone has never been installed on this computer, select the appropriate installation type and click **Next**.
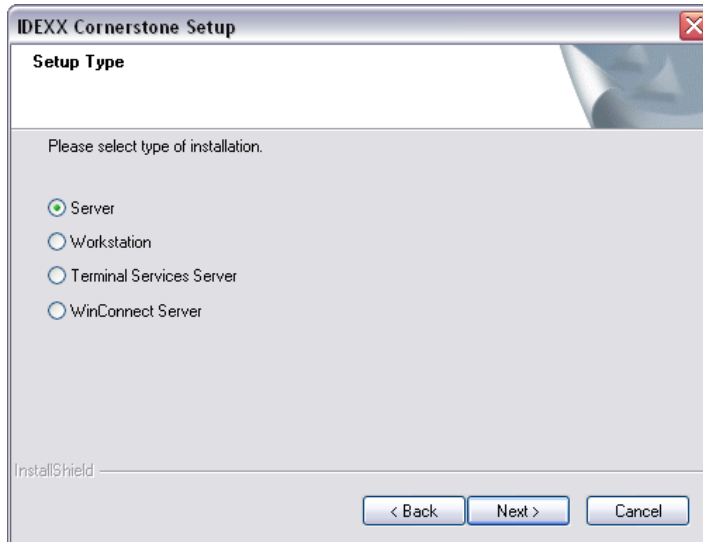
Setup Type window

7. If you have purchased the Central/Remote module, the Setup Type Central window appears. On the Setup Type Central window, select the appropriate Central/Remote installation type and click **Next**.
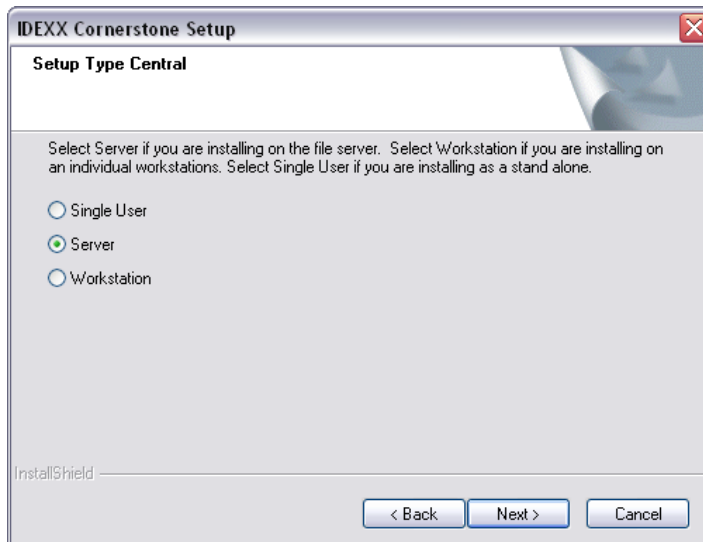
Setup Type Central window (appears only for Central/Remote users)

8. If the IDEXX SmartService* Solutions tool has not been installed with a previous installation of Cornerstone, the IDEXX SmartService License Agreement window appears. (IDEXX SmartService is an Internet-based service and support solution that provides automatic download and notification of Cornerstone service packs.) Read the license agreement, and then click **Yes** to accept the terms of the agreement and install IDEXX SmartService.

   A message states that the Cornerstone database will be backed up.

9. Click **OK**.

   A message states that the backup was successful.

10. Click **OK**.

    The Select Features window appears.

11. On the Select Features window, scroll through the list of Cornerstone feature modules and ensure that the appropriate modules are selected (the Cornerstone modules you have purchased are automatically selected). We do not recommend deselecting any module.
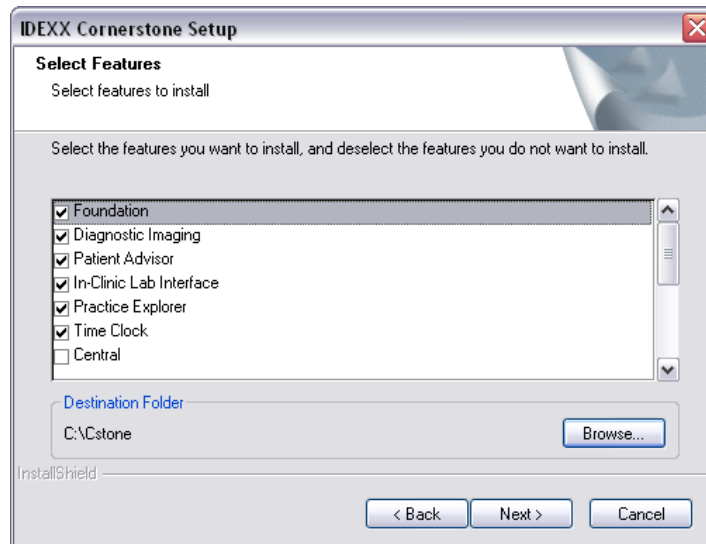
Select Features window for Cornerstone module installation

Note: If you are using Central/Remote, you must click the associated check boxes on the Select Features window. The Central/Remote features are not selected automatically based on the modules you have purchased.

12. Click **Next**.

    The Start Copying Files window appears.

13. Click **Next**.

    Note: If a Windows File Protection message displays, click **Cancel** to avoid restoring the original versions of the files, and then click **Yes**. These files will not affect stability; the files have been tested by IDEXX and are actually newer versions.

    Installation begins. A window displays the installation progress.

14. If you have purchased the IDEXX Diagnostic Imaging module, a message appears asking if you want to install DICOM® services. Do one of the following:

    - If you currently use DICOM services or plan to do so in the future, click **Yes**.

    - If you do not use DICOM services, click **No**.

15. If you are installing on a server or Remote Desktop Services/Terminal Services server, a message appears to remind you that the Cornerstone database must be updated after you restart the computer. Click **OK**.

16. On the Setup Complete window, click **Yes, I want to restart my computer now** and then click **Finish** to restart your computer.

    Note: If you have a Remote Desktop Services/Terminal Services server, you will have to restart manually.

17. After restarting your computer, proceed to the "Updating Your Database" section that follows to update your database.

Updating Your Database

Note: For installations on Windows Vista, Windows 7 or Windows Server 2008 R2, User Account Control (UAC) must be disabled during the update of the database. The update will not start with UAC enabled. See the "Disabling User Account Control" section on page 7 for steps to disable UAC.

1. After completing the Cornerstone 8.1 installation and restarting your computer, log on to the server, Remote Desktop Services/Terminal Services server, or stand-alone computer as usual.

2. If you are installing on a Remote Desktop Services/Terminal Services server and you do not see the **SQL** icon in the notification area on your taskbar, start the database manually by double-clicking the **Cornerstone Database Server** icon on your desktop.

3. Double-click the **Cornerstone** icon on the desktop or select **Start > Programs > Cornerstone > Cornerstone** to start Cornerstone.

    The following message appears: *The executable version (8.1.xx) and the database version do not match. Do you want the database brought up to date?*

4. Click **Yes**.

    The Cornerstone Update window appears. All of the feature modules you installed are checked.

    Note: If your practice uses the IDEXX SmartLink In-House Laboratory module, you must shut down the IDEXX VetLab Station and all other connected analyzers at this time to avoid errors while the database update program is running.

    Note: If your images are being stored in a location other than your server, that workstation must be logged into Windows at this time (before updating the database) to avoid altering your Cornerstone default image location.

5. Click **OK** to start the database update process.

    Note: Before the database update can begin, Cornerstone must first validate the directories required by Cornerstone. If any validation issues are encountered, a *Cornerstone directory validation* window appears. Review the information provided and then click **Close** and perform the suggested troubleshooting tasks. Click **Update** if you have completed the troubleshooting tasks and you are ready to update the Cornerstone database. If you need additional troubleshooting help, please contact IDEXX Cornerstone Support at 1-800-695-2877.

6. During the database update, the update program checks to verify the location of multiple folders. If the update detects any changes, you will be prompted multiple times to update the location. Click **Yes** at each prompt.

7. During the database update, the update program checks to verify the type of backup software installed on your server or stand-alone system.

   • If the update program locates one of the supported backup software packages, select the appropriate backup software and click **OK**.

   • If your practice uses other backup software, the software will continue to operate normally (your backup procedure will not change). Click **OK** to continue with the update.

   Note: For more information about the Backup Verification Assistant, see the *Cornerstone Administrator's Manual* on the Resource CD.

8. When the database update is complete, click **OK**.

   Note: The first time a staff member logs into Cornerstone after loading Cornerstone 8.1, the Physical Exam Upload window may prompt you to specify the name your practice uses for each of the given species. (If your practice has already established species links, this window does not appear.)

9. In Cornerstone, a Cornerstone Administrator will need to adjust security settings for your practice so that staff members can access the new features. See the *Cornerstone 8.1 Release Implementation Plan* on the Resource CD for a listing of these security settings.

5: Installation on Workstations

The steps in this section apply to the following installation environments:

- New Cornerstone workstations (Cornerstone has not been installed on this workstation before)
- Upgrades from Cornerstone 7.5 and prior versions
- Upgrades from Cornerstone 7.6 or 8.0

The process for upgrading from Cornerstone version 7.6 or 8.0 begins on this page. The installation process for first-time installations or upgrading from 7.5 and prior versions begins on page 15.

Upgrades from Cornerstone 7.6 or 8.0

Starting with Cornerstone version 7.6, when you installed Cornerstone manually on the server and workstations, the Install from Server service was automatically loaded on each machine. That installation put the service in place for future installations so that any future versions/updates/service packs need to be installed only on the server.

Notes on Install from Server:

- The Install from Server service applies to version upgrades only (full release upgrades, minor version updates and service packs). It does **not** apply to new workstation installations of Cornerstone. New installations must be installed from CD or installed manually (by running the setup.exe file) from a shared network folder.
- The activation key will be acquired automatically from the server.
- On each workstation, the service will use the same install folder location that was used for previous Cornerstone installations on that workstation.

Installing on Workstations Using Install from Server

Note: Before performing Install from Server updates, we recommend that you disable screen savers on all workstations to ensure that the updates can install without interruption.

1. Ensure that Cornerstone 8.1 has been installed on the server and that the Cornerstone database has been updated on the server.

2. On the workstation, double-click the **Cornerstone** icon on the desktop or select **Start > Programs > Cornerstone > Cornerstone** to launch 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?*

3. Click **Yes**. Cornerstone closes and the new version is installed automatically from the server (you do not need to click through the usual installation wizard screens).

   Note: If you click **No** when asked if you wish to install the update, Cornerstone closes. Cornerstone will not run on the workstation until the system detects that the workstation version matches the server version.

4. When the installation is complete, restart the workstation.

Installing on Workstations from a Shared Network Folder

If you have problems installing on workstations using the Install from Server service (because of firewall or security issues, etc.), Cornerstone can be installed on the workstations across the network from a shared network folder.

1. Ensure that Cornerstone 8.1 has been installed on the server and that the Cornerstone database has been updated on the server.

2. On the workstation, browse to the **\\server\cstoneshare\install\release** shared network folder and double-click the **setup.exe** icon.

   Note: If your server name is something other than *server*, replace the word *server* with your server name. To check the server name: On the server desktop or **Start** menu, right-click the **My Computer** icon and select **Properties**. The server name can be found on the **Computer Name** tab, listed after *Full computer name*.)

3. Follow the prompts to install on the workstation.

4. When the installation is complete, restart the workstation.

New Workstations OR Upgrades from Cornerstone 7.5 and Prior Versions

1. Insert the IDEXX Cornerstone CD in the CD-ROM drive. If a CD-ROM drive isn't available or is not currently functioning, Cornerstone can be installed across the network by running the setup.exe file from a shared network folder.

   If the CD does not automatically start, click the **Start** button and select **Run**. Type the letter of the CD-ROM drive followed by **:\setup.exe** (e.g., d:\setup.exe) and click **OK** to open the install program.

   Note: The Cornerstone 8.1 installation loads the **Install from Server** service on your system. For any future upgrades/updates/service packs installed *after* the initial 8.1 installation, the Install from Server service will automatically load the update files to the connected workstations. This will allow your practice to install and maintain your Cornerstone software practice-wide without requiring an administrator to log into each workstation and manually install from CD.

   An Install IDEXX Cornerstone message asks whether you want to install Cornerstone now.

2. Click **Yes**.

   The Extract Cornerstone Setup window appears and displays its progress while extracting the Cornerstone installation files.

3. When the Welcome window appears, click **Next**.

4. Click **I accept the terms of the license agreement** to accept the software license agreement, and then click **Next**.

5. On the Activation Key – Edit Data window, do one of the following:

   - *For upgrades:* If you are upgrading from a prior version of Cornerstone, the Clinic ID and Key will be filled in automatically. Click **Next**.

   - *For new installations or installations with a new key:* If Cornerstone has never been installed on this computer before, type your Clinic ID and Key and click **Next**.
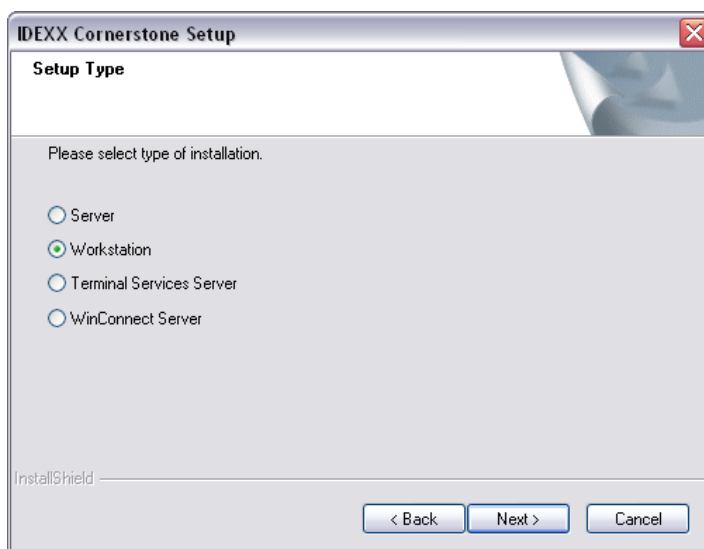
   Note: If you do not know the Clinic ID or Key, you can acquire it from the server. To access this information, log into Cornerstone on the server, then go to **Help > About IDEXX Cornerstone** and click the **More** button.
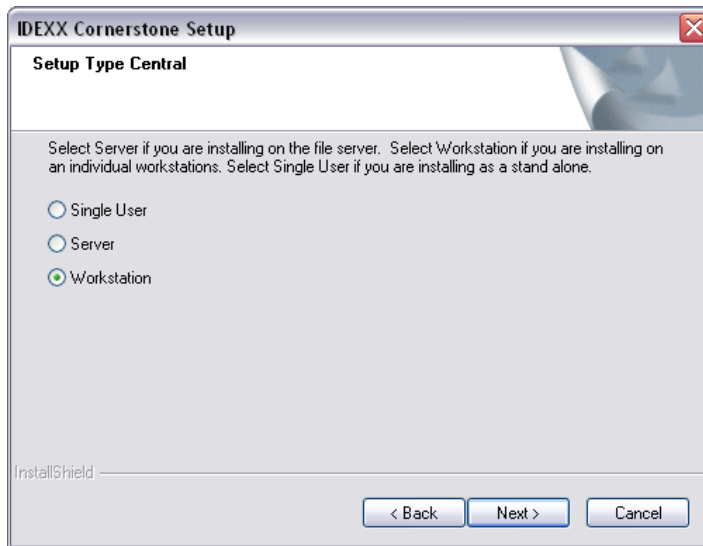
Activation Key – Edit Data window

6. On the Setup Type window, if not already selected, select the **Workstation** installation type and click **Next**.


Setup Type window

7. If you have purchased the Central/Remote module, the Setup Type Central window appears. On the Setup Type Central window, select the **Workstation** installation type and click **Next**.

Setup Type Central window (appears only for Central/Remote users)

The Select Features window appears.

8. On the Select Features window, scroll through the list of Cornerstone feature modules and ensure that the appropriate modules are selected (the Cornerstone modules you have purchased are automatically selected). We do not recommend deselecting any module.
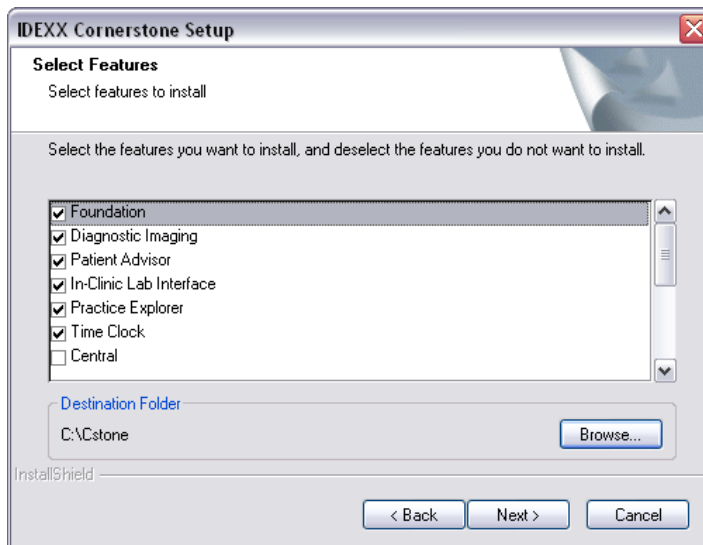
Select Features window for Cornerstone module installation

Note: If you are using Central/Remote, you must click the associated check boxes on the Select Features window. The Central/Remote features are not selected automatically based on the modules you have purchased.

9. Click **Next**.

10. The Start Copying Files window appears. Click **Next**.

Note: If a Windows File Protection message is displayed, click **Cancel** to the restoration of the original versions of these files and then click **Yes** that you are sure. These files will not affect stability; the files have been tested by IDEXX and are actually newer versions.

Installation begins. A window displays the installation progress.

11. On the Setup Complete window, click **Yes, I want to restart my computer now** and then click **Finish** to restart your computer.

6: Installation for the Mobile Computing Module

Installing Cornerstone 8.1 for the Mobile Computing Module

If you are using the Mobile Computing module, use the following instructions to install Cornerstone 8.1.

Note: See the *Cornerstone User's Manual* for additional information on using the Mobile Computing module.

1. Bring all mobile computers into the practice. (If you cannot bring all mobile computers into the practice at the same time, see the "If You Cannot Bring Each Laptop/Tablet into the Practice" section that follows.)

2. Synchronize each mobile computer.

3. Remove each mobile computer from the Mobile Computing List by selecting **Undo mobile computer**.

4. At your practice, install Cornerstone 8.1 on your server and workstations according to the steps in the "4: Installation on a Server or Stand-Alone Computer" and "5: Installation on Workstations" chapters in this guide.

5. Install Cornerstone 8.1 on each laptop/tablet according to the steps in the "5: Installation on Workstations" chapter starting on page 14 in this guide.

6. Start Cornerstone on each laptop/tablet and create the mobile computer. (See the "Using the Mobile Computing Module" chapter in the *Cornerstone User's Manual* for information on creating a mobile computer in Cornerstone.)

If You Cannot Bring Each Laptop/Tablet into the Practice

We strongly encourage you to bring all of the mobile computers into the practice at the same time to perform the Cornerstone 8.1 installation.

WARNING: If you do not bring in all mobile computers to be synchronized at the time of updating, you will be at risk of data loss on the mobile computers that were not present at the time of the update.

If it is not possible to bring all mobile computers into the practice at the same time, follow these instructions:

1. Bring in as many of your mobile computers as possible and follow the instructions in the previous "Installing Cornerstone 8.1 for the Mobile Computing Module" section.

2. As you are able, bring your other mobile computers into the practice for updating.

   You will need to update your mobile database before synchronizing:

   a. On each mobile computer that has not yet been updated, install Cornerstone 8.1 according to the steps in the "5: Installation on Workstations" chapter starting on page 14 in this guide.

   b. After installation, start Cornerstone on the mobile computer. An alert will appear, informing you that your database needs to be updated. Click **Yes** to update the database. (If the update is not performed, Cornerstone will not function on this mobile computer and you will not be able to synchronize with the server.)

3. Synchronize the mobile computer with the server.

4. For any mobile computer that is not synchronized with the server before Cornerstone 8.1 is installed on the server, the first time you sync after installing 8.1 on the mobile computer, you will see a duplicate client error for EMR_CLT and a duplicate patient error for EMR_PAT. To solve this problem, do the following:

   a. In order to complete the synchronization, enter a new patient ID and a new client ID (you will need to delete these IDs in the next step, so you may want to write them down for easy reference).

   b. Log into Cornerstone on the server and delete the new patient ID and client ID (using **Lists > Patient** and **Lists > Client**). Note that the patient ID must be deleted first, as you cannot delete a client ID that has a patient ID associated with it.

   Note: Do not delete the EMR_CLT or EMR_PAT IDs from the mobile computer or the server.

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