

This guide covers installing the new version of the IDEXX Cornerstone* Practice Management System from a download that you've received over the Internet through IDEXX SmartService* Solutions.

If this isn't what you're trying to do, see these related documents:

- If you're installing from a DVD, use the [Getting Started Guide for Installing from DVD](#).
- If you're installing Cornerstone software for the first time on a new workstation, use [Installing Cornerstone on a New Workstation](#).
- If you've already installed Cornerstone, use the [Getting Started Guide for Setup and Training](#).

1: Quick View Checklist

Use the checklist below to be sure you complete all the steps you need to upgrade, set up, and start using your Cornerstone software. Links in the checklist either take you to a section in the *Getting Started Guide* or open *What's New in Cornerstone 8.3*, which contains detailed information about setting up and using new features.

To access these documents, visit the **Cornerstone Resource Library** online at idexx.com/cornerstoneresources. Copies of both documents are also installed on your computer along with your Cornerstone software.

If you're upgrading from a version before Cornerstone 8.2, see [Prepare Your Practice for 8.3 NEXT](#) for additional information about changes in Cornerstone and training resources.

Determine estimated installation time

- Determine approximately how long it will take you to upgrade to version 8.3.6 based on your practice's database size, network configuration, and current Cornerstone version by using the [Upgrade Time Guide](#).

Preinstallation planning

- Review [hardware/operating system guidelines](#) (separate document) to be sure your computers will be able to run the new software.
- Review the [checklist of prerequisites](#) so that you know what you need to do before installation to set up and use the new features in this release (p.3)

System preparation

- If you are installing or upgrading mobile computers, follow [special mobile computing instructions](#) (p. 18)

Note: For Cornerstone NEXT version 8.3.6, it is important that you follow the process of syncing and undoing mobile computers even if you haven't done this for previous upgrades.

- [Prepare your system](#), including the computers in your Cornerstone network as well as in-house laboratory equipment, and your digital imaging capture station. (p.9)
- This takes about 15 minutes in most practices.

Installation

- [Upgrade Cornerstone on your server](#) (p. 13)
- [Upgrade your workstations](#) (p. 15)
 - This should take about 15 minutes per workstation, although the specifications of the workstation computers and your network may extend the time for this step.
 - If you use the install from server feature, you can upgrade up to three workstations at a time.
- [Confirm upgrade and resume normal operations](#) (p. 17)

Set up security access to new windows and reports

- Set up security for new features by referencing these [recommended security settings](#) (p. 19).

Set up new features

- View detailed information about setting up the new features and functionality in this release in [What's New in Cornerstone 8.3](#). See the Setup instructions at the beginning of each feature section.

Learn and educate

- [Use the training checklist](#) to introduce the new features you choose to implement to your practice, and train staff (p. 21).
- View details about how to use the new features in [What's New in Cornerstone 8.3](#). See the Use section for each feature.
- To review the basics of Cornerstone in the context of version 8.3, view the [Basic Foundation Training tutorial](#) on the IDEXX Learning Center.

[Click here](#) to jump back to the top of the Quick View Checklist.

2: Prerequisites for New Features

Many of the new features in the 8.3 release require some setup in the Cornerstone* Practice Management System before you can use them. In addition, a few features have more involved prerequisites, such as purchasing an additional Cornerstone module or activating an account to use other IDEXX or non-IDEXX software or devices. The table below gives an overview of new features with significant prerequisites or setup requirements.

If you have questions or would like more information, please contact your IDEXX Cornerstone Sales Representative at 1-800-283-8386.

For more detailed information about how to set up and use the new features, see *What's New in Cornerstone 8.3*. Places to find this information are listed in the “For full details” sections of the tables below.

Note: Modules marked **Reinstall** are activated by reinstalling the Cornerstone software with a new activation key. To save time, you may want to purchase these modules before upgrading to Cornerstone 8.3, so you can enter the new key as part of the upgrade process, rather than reinstalling again later.

Client Communications

IDEXX Pet Health Network* Pro	
<p>IDEXX Pet Health Network* Pro lets you manage communication to and from your clients within the Cornerstone* Practice Management System. IDEXX Pet Health Network Pro is currently available in the United States only.</p> <p>The tools available when you use IDEXX Pet Health Network Pro with Cornerstone include:</p> <ul style="list-style-type: none"> • Sending automatic reminders by mail and/or email • Allowing clients to confirm via email or text—with the confirmation recorded in Cornerstone automatically • Manage important client communications from the Cornerstone message center—including appointment and prescription requests and updated client information • Sharing selected documents from the patient record with clients electronically 	
<p>Prerequisites</p> <ul style="list-style-type: none"> <input type="checkbox"/> Before you use the IDEXX Pet Health Network Pro features in Cornerstone, you need to sign up for the service. Get started by contacting an IDEXX Pet Health Network Pro communications specialist at 1-855-627-6570 or support@pethealthnetworkpro.com. <p>Note: IDEXX Pet Health Network Pro is a subscription-based service. There is also a charge for postcard communications. Contact IDEXX Pet Health Network Pro for subscription information.</p> <ul style="list-style-type: none"> <input type="checkbox"/> To communicate with IDEXX Pet Health Network Pro, the Cornerstone server must have Internet access. 	<p>Setup</p> <ul style="list-style-type: none"> <input type="checkbox"/> When you sign up for IDEXX Pet Health Network Pro, your dedicated communications specialist works with your practice to customize your marketing plan and ensure that you get the most out of your client communications. The specialist will also walk you through setting up IDEXX Pet Health Network Pro to support your plan for your practice. <input type="checkbox"/> If you are already using IDEXX Pet Health Network Pro without Cornerstone, some additional setup is required to use the features that are available with Cornerstone. Contact an IDEXX Pet Health Network Pro communications specialist at 1-855-627-6570 or support@pethealthnetworkpro.com.

For full details

See “IDEXX Pet Health Network Pro” in *What’s New in Cornerstone 8.3*.

IDEXX Email Service and IDEXX Faxing Service

Cornerstone has enhanced its email capability and added the ability to fax documents directly from within the system, saving staff members’ time and enhancing the overall work flow of the practice. This feature may be of particular interest to specialty/referral and emergency practices, as well as to referring veterinarians.

Prerequisites

- To purchase the IDEXX Faxing Service, contact IDEXX Cornerstone Support at 1-800-695-2877. The IDEXX Faxing Service is available in the United States and Canada.
- No special prerequisites are required to set up IDEXX Email Service.
- As with any Cornerstone email feature, you need to have an email account. If you want Cornerstone to use a desktop email program, such as Microsoft® Outlook®, that program needs to be set up.

Setup

- To activate IDEXX Faxing Service, you will need to perform a one-time setup to specify your account information and to agree to the terms and conditions of use.
- To activate IDEXX Email Service, you may need to perform a one-time setup to specify your account information.
- If you want to use a web-based email provider, such as Gmail™, Hotmail®, etc., additional configuration may be needed.

For full details

See “Communications Management for Email and Fax,” in *What’s New in Cornerstone 8.3*.

LifeLearn® ClientEd Online™

Cornerstone integrates with LifeLearn® ClientEd Online™ to offer customizable client education documents. ClientEd Online has more than 1,200 documents in its library, and new documents are added regularly. LifeLearn ClientEd Online is available in the United States and Canada.

Prerequisites

- Both new and existing LifeLearn customers will need to subscribe to the ClientEd Online service. Please contact your IDEXX Cornerstone Sales Representative at 1-800-283-8386 for more information.
- Using LifeLearn ClientEd Online documents requires Microsoft® Word 2003 or newer.

Setup

- Once you have completed the signup process and received your LifeLearn username and password, you can then perform the synchronization in Cornerstone to begin printing your ClientEd Online client handout documents.
- If you are currently using CD-based LifeLearn documents, you will want to review and potentially delete these documents before performing the synchronization. See “Getting Started with LifeLearn ClientEd Online” in *What’s New in Cornerstone 8.3*.

For full details

For information about purchasing LifeLearn ClientEd Online or about integrating your ClientEd Online documents with Cornerstone, see “Getting Started with LifeLearn ClientEd Online” in *What’s New in Cornerstone 8.3*.

For full details, see “LifeLearn ClientEd Online Integration with Cornerstone” in *What’s New in Cornerstone 8.3*.

Laboratory

VetConnect* PLUS

VetConnect* PLUS is an exciting, new web-based tool that lets you view, trend, and compare current and historical IDEXX test results side-by-side. With VetConnect PLUS, you can trend in-house diagnostics and outside laboratory data together, and display the results relative to the reference intervals for both, providing an enhanced diagnostic view for you and for your clients.

VetConnect PLUS is integrated into the laboratory work flow you use in Cornerstone—giving you easy access when and where you need it.

Prerequisites

- To see results from an IDEXX VetLab* Station on VetConnect PLUS, IDEXX SmartLink* technology is required to provide bidirectional flow between Cornerstone and your IDEXX VetLab Station. In addition, IDEXX SmartService* Solutions needs to be set up for the IDEXX VetLab Station. For more information, please contact your IDEXX Connectivity Consultant at 1-877-256-8457.
- The workstation where you want to view VetConnect PLUS must have Internet access.
- Windows®/Internet Explorer® 7 or later must be installed on each workstation. It does not have to be the default Internet browser.
- You must have a VetConnect account with administrator user name and password. Visit vetconnect.com or call 888-433-9987 to request an account if your practice does not already have one.

Setup

- Activate VetConnect PLUS from within Cornerstone. This begins the process of loading historical IDEXX Reference Laboratories data (if applicable); this may continue for up to 24 hours. (Cornerstone performance is not affected by the upload.)
- After you activate VetConnect PLUS from within Cornerstone, activate VetConnect PLUS from your IDEXX VetLab Station (if applicable). This begins the process of loading data, which may take a few hours. You can still use the IDEXX VetLab Station and Cornerstone during the upload.

For full details

See “VetConnect PLUS” in *What’s New in Cornerstone 8.3*.

IDEXX VetLab* Station

Cornerstone 8.3 offers more convenient communication between the workstations of your Cornerstone network and one or more IDEXX VetLab Station computers.

Prerequisite:

Required Setup for All Cornerstone/IDEXX VetLab Station Users

- ❑ If you use IDEXX SmartLink technology to connect Cornerstone and IDEXX VetLab Station, there is a required one-time update to link some patient sex and species values in the database. Cornerstone will attempt to complete the update automatically, but you may be prompted to manually resolve some linking questions. See “Linking Cornerstone Values with Laboratory Values” in *What’s New in Cornerstone 8.3*.

Setup for Enhanced Communication Features

- ❑ If you have multiple IDEXX VetLab Station computers, you can associate specific practice locations or workstations to use with a specific IDEXX VetLab Station by default. See “Improved Communications with IDEXX VetLab Station” in *What’s New in Cornerstone 8.3*.

For full details

See “IDEXX VetLab Station” in *What’s New in Cornerstone 8.3*.

Antech Diagnostics® Module

The Antech Diagnostics® module has been updated to enable online test ordering and automatic result download. In addition, pricing updates are pushed through Cornerstone automatically, providing you with the most up-to-date prices for tests. The Antech Diagnostics module is available in the United States and Canada.

Prerequisites

- ❑ To purchase the Antech module or to upgrade from the previous version of the module, contact your IDEXX Cornerstone Sales Representative at 1-800-283-8386.
- ❑ **Reinstall:** If you do not already have the Reference Laboratory module, you will need to purchase it as well. You will need to reinstall Cornerstone in order to start using the Reference Laboratory module.

Setup

- ❑ A one-time setup process is required to enter login information for the Antech website.
- ❑ There is a required one-time update to link some patient sex and species values between Cornerstone and Antech. See “Linking Cornerstone Values with Laboratory Values” in *What’s New in Cornerstone 8.3*.
- ❑ One-time setup is required if you want to set or change default pricing options on the Antech Diagnostics Lab Information window, or if you want to manually set profile prices or change the markup percentage.

For full details

See “Antech Diagnostics Module” in *What’s New in Cornerstone 8.3*.

Imaging

DICOM® Modality Worklist Integration

Cornerstone 8.3 leverages the modality worklist features of the DICOM® standard to share patient and exam information with a variety of non-IDEXX imaging devices. With devices that support the modality worklist and modality performed procedure step (MPPS) features of DICOM, you can send requests for images to these devices and see the status of these requests in Cornerstone. Limited integration may be possible with devices that do not support MPPS.

Prerequisites

- To use the new imaging integration features, DICOM Imaging and the Modality Worklist Integration module are required. For more information, contact your IDEXX Cornerstone Sales Representative at 1-800-283-8386.
- Reinstall:** If you purchase DICOM Imaging, you will need to reinstall Cornerstone.
- If you have an IDEXX Digital Imaging system and already have IDEXX SmartLink Digital Imaging, you do not need to purchase additional modules.

Setup

- A one-time setup is required to enter DICOM information about your computer network and each validated system with which you want to establish a modality worklist connection. There is a one-time fee for setting up the integration between a validated system and Cornerstone. For more information, contact your IDEXX Cornerstone Sales Representative at 1-800-283-8386. For a list of systems that have been validated by IDEXX as capable of integrating with Cornerstone, see idexx.com/validatedsystems.

For full details

See “Worklist Integration” in *What’s New in Cornerstone 8.3*.

Credit Card Processing

Integrated Payment Solution with XCharge®

The IDEXX Cornerstone* integrated payment solution, introduced in Cornerstone 8.1, provides a simple and secure solution for credit card processing initiated from Cornerstone. XCharge® software, developed by Accelerated Payment Technologies®, processes both credit and debit card transactions in the United States and Canada through an Internet connection. Helping you move toward a chartless practice, Cornerstone 8.3 now allows you to capture a client’s electronic signature for all credit card payments using a supported signature capture device or tablet PC.

Prerequisites

- Supported signature capture devices include the Topaz® ClipGem®, Topaz SignatureGem® (SigGem) and Topaz SigLite® LCD devices, or a tablet PC. For information on purchasing a signature capture device, call your IDEXX Practice Solutions Representative for Supplies at 1-888-224-4408.

Setup

- A one-time setup process is required to connect and enable the signature capture device.

For full details

See “Electronic Signature Capture with XCharge” in *What’s New in Cornerstone 8.3*.

Inventory

IDEXX SmartOrder* Inventory Solution	
<p>IDEXX SmartOrder* is the automated inventory integration between Cornerstone and MWI® Veterinary Supply (mwivet.com). IDEXX SmartOrder allows practices to place orders within Cornerstone and receive real-time inventory item status updates and electronic record of receipt from mwivet.com via a cloud-based Internet connection. This IDEXX SmartOrder inventory solution is available in the United States.</p>	
<p>Prerequisites</p> <ul style="list-style-type: none"><input type="checkbox"/> An account with MWI is required to set up and use the IDEXX SmartOrder solution. Contact your MWI representative to set up your mwivet.com account if your practice does not have one.<input type="checkbox"/> A consistent, high-speed Internet connection is required for IDEXX SmartOrder.<input type="checkbox"/> Windows®/Internet Explorer® 7 or later must be installed on each workstation. It does not have to be the default Internet browser.	<p>Setup</p> <ul style="list-style-type: none"><input type="checkbox"/> To connect IDEXX SmartOrder with the MWI online inventory ordering system, you must complete a one-time setup to enter your account information in Cornerstone and to agree to the terms and conditions of use for MWI.<input type="checkbox"/> For items that you order through MWI, you need to add a vendor item ID numbers and assign them to corresponding inventory item ID numbers. You can do this “on the fly” while working with an inventory order, or you can add and assign vendor item ID numbers ahead of time. The most efficient way to prepare for IDEXX SmartOrder is to assign IDs ahead of time for all the inventory items you order frequently from MWI.
<p>For full details</p> <p>See “Electronic Inventory Ordering with IDEXX SmartOrder and MWI Veterinary Supply” in <i>What’s New in Cornerstone 8.3</i>.</p>	

[Click here to jump back to the Quick View Checklist.](#)

3: System Preparation

Installation Notes

- If you are upgrading from an **older version prior to Cornerstone 6.2**, call IDEXX Cornerstone Support (1-800-695-2877) to receive alternate upgrade instructions.
- 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.
- During installation, Windows or your anti-virus software may display messages that ask for your interaction. Please respond to these prompts appropriately. In some situations, certain kinds of anti-virus and/or firewall software may need to be temporarily disabled or put into a specific mode for installations. (IDEXX recommends a hardware firewall.)

Hardware and Operating System Confirmation

- Review the [Cornerstone Hardware and Operating System Guidelines](#) to confirm that your hardware and operating system will run Cornerstone software at the best possible speed and highest level of efficiency.
- Make sure Windows®Internet Explorer® 7 or later is installed on each workstation. It does not have to be the default Internet browser.

Prepare Laboratory Equipment

- If you have in-clinic laboratory devices, do the following:
 - If your practice uses the IDEXX SmartLink* In-House Laboratory module with the **IDEXX VetLab* Station**, shut down the IDEXX VetLab Station.
 - If your practice has an **IDEXX LaserCyte* Hematology Analyzer**, **IDEXX VetTest* Chemistry Analyzer**, or **Abaxis® VetScan® Analyzer** which is connected directly to your Cornerstone system (not through an IDEXX VetLab Station), do the following on the computer that is your Cornerstone laboratory workstation:
 - a. Press CTRL+ALT+DELETE, select **Task Manager** or **Start Task Manager**, and click the **Processes** tab.
 - b. In the list, select **Vetcom32.exe** (for IDEXX analyzers) and/or **Vsccom32.exe** (for Abaxis analyzers), then click the **End Process** button. A message will pop up to confirm that you want to do this.
 - c. Click **Yes** or **End Process**.
 - If you have any other analyzer or diagnostic device that is connected directly to your Cornerstone system (not through an IDEXX VetLab Station), please call IDEXX Cornerstone Support at 1-800-695-2877 for further instructions.

Prepare Imaging Equipment

- If your practice has the **IDEXX 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**.)

- To avoid altering your Cornerstone default image location, if your images are being stored in a location other than your server, that workstation must be logged into Windows® until you complete the “Update the server database” instructions.
- 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).

Computer Preparation

For the following steps, you may want to consult the person who handles or advises you on computer and network setup.

The Windows software firewall and the User Account Control can interfere with the installation process. In many cases, these are already turned off.

Confirm that the Windows® Firewall is disabled

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 check (and disable) the Windows Firewall in Windows XP and Windows Server 2003:

1. Click **Start > Settings > Control Panel**.
2. Double-click **Windows Firewall**.
3. Verify that the firewall is disabled.
4. If it is disabled, skip to step 6.
5. If it is not already disabled, do the following:
 - a. Select **Off (not recommended)**.
 - b. Click **OK**.
6. Close the Windows Firewall window and close the Control Panel.
7. 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. Verify that the firewall is disabled.
4. If it is disabled, skip to step 6.
5. If it is not already disabled, do the following:
 - a. Click **Change Settings**.
 - b. In the Windows Firewall Settings window, click **Off (not recommended)** and click **OK**.

6. Close the Windows Firewall window and close the Control Panel.
7. Disable any other firewall software.

To check (and disable) the Windows Firewall in Windows 7, Windows 8, Windows Server 2008 R2, and Windows Server 2012 R2:

1. Do one of the following:
 - In Windows 7 or Windows Server 2008 R2, click **Start > Control Panel** and then click **Windows Firewall**.
 - In Windows 8 or Windows Server 2012 R2, click the **Settings** charm, click **Control Panel**, and then click **Windows Firewall**.
2. Click **Turn Windows Firewall on or off**.
3. Verify that the Windows Firewall is turned off.
4. If the Windows Firewall is not turned off:
 - a. In the *Home or Work (Private) network location settings* area and/or the *Domain network location settings* area, 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.
 - b. Click **OK**.
5. Close the Windows Firewall window and close the Control Panel.
6. Disable any other firewall software.

Confirm that User Account Control is disabled

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 check (and 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. Verify that User Account Control is turned off.
5. If it is turned off, close the User Accounts window and the Control Panel window.
6. If User Account Control is not turned off:
 - a. Click **Continue** at the User Account Control prompt.
 - b. Uncheck **Use User Account Control (UAC) to help protect your computer**.
 - c. Click **OK** and restart the computer.

To check (and disable) User Account Control in Windows 7, Windows 8, Windows Server 2008 R2, and Windows Server 2012 R2:

7. Do one of the following:
 - In Windows 7 or Windows Server 2008 R2, click **Start > Control Panel** and then click **User Accounts**.

- In Windows 8 or Windows Server 2012 R2, click the **Settings** charm, click **Control Panel**, and then click **User Accounts**.
8. Click **Change User Account Control settings**.
 9. Verify that User Account Control is turned off (is set to Never notify).
 10. If it is turned off, close the User Accounts window and the Control Panel window.
 11. If User Account Control is not turned off:
 - a. Slide the adjustment bar to **Never notify**.
 - b. Click **Yes** at the User Account Control prompt.
 - c. Click **OK** and click **Yes! Restart the computer**; otherwise, restart the computer manually.

Other Steps to Take Before You Begin the Installation

1. Run End of Day processing
2. Perform your usual backup.
3. Close any programs that are open, including Cornerstone, on all computers.
4. 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**.
Tip: If the processes aren't already shown in alphabetical order, click the **Name** heading to sort them.
 - c. Close the Task Manager window when finished.
5. 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 8.3. To uninstall, go to **Control Panel** (in Classic View) > **Programs and Features** > select the **Cornerstone PDF Printer** and click the **Uninstall/Change** button.
6. If you are using the Mobile Computing module, bring in, synchronize and undo your mobile computers. (See chapter 7, "Installation for the Mobile Computing Module," on page 18 in this guide for more information.) Close the Cornerstone database engine by doing one of the following:
 - If you see the **SQL**  icon in the notification area on your taskbar (lower right of your screen), right-click it and select **Exit**.
 - If the **SQL** icon is not present:
 - a. Press CTRL+ALT+DELETE, and then click **Task Manager** or **Start Task Manager**.
 - b. Click the **Processes** tab, and select **dbsrv7.exe**.
 - c. Click **End Process**, and then click **Yes** or **End Process** in the dialog box that appears.
7. 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**.

[Click here to jump back to the Quick View Checklist.](#)

4: Installation on a Server or Stand-alone Computer

The steps in this section cover installing a new copy of the Cornerstone* Practice Management System from in the following installation environments:

- Server
- Remote Desktop Services/Terminal Services server
- Stand-alone computer (if you have Cornerstone on only one computer)

If you have more than one computer on your Cornerstone network, you need to install Cornerstone 8.3 on the server first. Then, see chapter 6, “Installation on Workstations,” starting on page 15 for information on the proper installation procedures for Cornerstone workstations.

IMPORTANT: You will need to restart the server/standalone computer as part of this process.

Begin an upgrade over the internet (with IDEXX SmartService* Solutions)

When a new Cornerstone update is available, it downloads automatically to your Cornerstone server computer (or stand-alone computer). Once an update is received, all Cornerstone administrators receive a message when they log in notifying them that an update is available.

A yellow  notification icon appears on the Cornerstone status bar (lower right) and remains there as a reminder until the update is installed.

1. Double-click the **Update Launcher**  icon on the desktop.
2. On the Cornerstone Update Available dialog box, click **Install**.
3. Follow the prompts to install the Cornerstone update.

Note: During installation, Windows or your anti-virus software may display messages that ask for your interaction. Please respond to these prompts appropriately. In some situations, certain kinds of anti-virus and/or firewall software may need to be temporarily disabled or put into a specific mode for installations. (IDEXX recommends a hardware firewall.)

4. When the installation is complete, click **Finish** to restart the server. This may take a few moments.
5. Once the server has been restarted, log in to Windows.

Update your database

1. After completing the Cornerstone 8.3 installation and restarting your computer, log on to the server, Remote Desktop Services/Terminal Services server, or stand-alone computer as usual.
2. Do the following to start up the database:
 - If you are installing on a Remote Desktop Services/Terminal Services server, start the database manually by double-clicking the **Cornerstone Database** icon  on your desktop.
 - If you are installing on a server or standalone computer, the database should start automatically. However, if 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.

The IDEXX Database and Services window appears, and displays a list of starting and stopping activities. After a few moments, the Starting Cornerstone Database message appears, along with a

second window. This second window closes automatically, and the IDEXX Database and Services window displays several starting messages, followed by the word Finished.

3. Click **Minimize** (–) in the upper right of the window to close it.
4. Double-click the **Cornerstone** icon on the desktop or select **Start > Programs > Cornerstone > Cornerstone** to start Cornerstone.

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

5. Click **Yes**.

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

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

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

7. 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.
8. 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.
9. When you see **Database key validation successful** on the left side of the update window, click **OK**.

Note: The first time a staff member logs into Cornerstone after loading Cornerstone 8.3, 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.)

[Click here to jump back to the Quick View Checklist.](#)

5: Installation on Workstations

Installing the New Version on Workstations

Once the server database has been updated, you can use Cornerstone on any thin-client workstations in your practice without any further actions. (Thin-clients, also known as terminals, are workstations that run Cornerstone on the server using a Remote Desktop Connection.)

After you have installed the new version of Cornerstone on your server, you can install it on your thick-client workstations by using either the install from server feature (recommended), or a shared network folder.

Notes on the Install from Server Feature:

- When you installed your current version of Cornerstone 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.
- 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 DVD or installed manually (by running the setup.exe file) from a shared network folder. Use [Installing Cornerstone on a New Workstation](#) to do this.
- 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

Complete these steps on all thick-client Cornerstone workstations. (Thick-clients are workstations that run Cornerstone locally.) Up to three workstations can be updated at the same time.

Note: Do not start this part of the process until you have finished upgrading the Cornerstone server and updating the database by following all of the instructions above.

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 8.3 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 8.3 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 update is complete, click **Reboot Now** in the IDEXX Install from Server window to restart the workstation.

[Click here to jump back to the Quick View Checklist.](#)

6: Confirm upgrade and resume normal operations

To confirm your upgrade and resume normal operations:

1. On your server and on each workstation, check that Cornerstone is working as usual.
2. If you turned off your IDEXX VetLab* Station as part of the [system preparation instructions](#) (p.9), turn it back on.
3. If you turned off the Windows® Firewall or User Account control, refer to the instructions in the [system preparation instructions](#) (p.9) to turn them back on.

Note: If these features were off already before you began the upgrade process, and you made no changes, do not change them now.

[Click here to jump back to the Quick View Checklist.](#)

7: Installation for the Mobile Computing Module

Installing Cornerstone 8.3 for the Mobile Computing Module

If you are using the Mobile Computing module, use the following instructions to install the Cornerstone* 8.3 NEXT version 8.3.6.

Note: See the [Cornerstone User's Manual](#) for additional information on using the Mobile Computing module.

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, install Cornerstone 8.3 on your server and workstations according to the steps in chapter 4, "Installation on a Server or a Stand-alone Computer," and chapter 5, "Installation on Workstations," in this guide.
5. Install Cornerstone 8.3 on each laptop/tablet according to the steps in chapter 5, "Installation on Workstations," starting on page 15 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.)

[Click here to jump back to the Quick View Checklist.](#)

8: Security and Setup

Suggested Security by Staff and Role for New Windows in Cornerstone 8.3

There are a number of new windows and new reports in Cornerstone 8.3.

The table below shows the suggested security access settings for these windows and reports for different staff and roles within your practice:

- **GEN**—If you choose to have only two tiers of security, for administrators and all other staff members, this would be the access settings for staff members who aren't administrators.
- **REC**—Receptionists
- **DR**—Doctors
- **TECH**—Technicians
- **M/O**—Managers/Owners

For more information about setting up security, see the *Cornerstone 8.3 Default and Security Settings Guide*.

Dialog Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
Antech – Lab Item Price Update			X	X	X	Activities > Lab Work > Update Antech Lab Item Prices
Imaging DICOM Modality Types			X	X	X	Activities > Imaging > DICOM Modality Types
Invoice Discount – Apply to all lines	X	X	X	X	X	From the Invoice, select No in Discount column > Select discount to be applied > Select option to Add line discounts to all lines for this patient > Select OK
IDEXX Message Center			X	X	X	 button on toolbar
Patient Vaccine Corrections			X	X	X	Select patient Tags/Microchip ID tab > right-click on vaccination > Correct or Reissue
Synchronize LifeLearn Documents					X	Tools > Synchronize LifeLearn Documents
Report Security	Access Suggestions					Path to Locate
	GEN	REC	DR	TECH	M/O	
EOM Referral Revenue Report by Doctor by Revenue Center					X	Reports > End of Period > EOM > Specify Monthly Period>Specify EOM - Referral Revenue Report by Doctor by Revenue Center> Print OR Preview>Specify Doctor/Doctors>OK
EOM Referral Revenue Report by Hospital by Revenue Center					X	Reports > End of Period > EOM > Specify Monthly Period>Specify EOM - Referral Revenue Report by Hospital by Revenue Center> Print OR Preview>Specify Hospital or Revenue Center

EOM Referral Revenue Report by Rev Center by Doctor by Hospital					X	Reports > End of Period > EOM > Specify Monthly Period>Specify EOM Referral Revenue Report by Rev Center by Doctor by Hospital> Print OR Preview>Specify Date, Doctor ID, or Revenue Center ID
EOM Referral Revenue Report by Rev Center by Hospital by Doctor					X	Reports > End of Period > EOM > Specify Monthly Period>Specify EOM Referral Revenue Report by Rev Center by Hospital by Doctor>Specify Hospital ID or Revenue Center ID
EOM Referral Summary by Revenue Center – Doctor by Hospital					X	Reports > End of Period > EOM > Specify Monthly Period>Specify EOM Referral Summary by Revenue Center – Doctor by Hospital> Print or Preview>Specify Doctor ID or Revenue Center ID
EOM Referral Summary by Revenue Center – Hospital by Doctor					X	Reports > End of Period > EOM > Specify Monthly Period>Specify EOM Referral Summary by Revenue Center – Hospital by Doctor>Print or Preview>Specify Hospital ID or Revenue Center ID

This document contains suggested security settings; however, it is ultimately the practice's decision-maker that decides who needs access to certain areas within Cornerstone, and IDEXX shall not be liable for any actions arising from those security decisions.

[Click here to jump back to the Quick View Checklist.](#)

9: Communications and Training

Training Checklist

Use the "Use" sections in the Cornerstone* 8.3 What's New to train your staff on the new features.

The table below provides a checklist for all the new features in What's New.

Client Communications	
IDEXX Pet Health Network* Pro	<input type="checkbox"/> Overview <input type="checkbox"/> View Incoming Client Requests and information via the IDEXX Message Center <input type="checkbox"/> Automatic Appointment Confirmations through IDEXX Pet Health Network Pro <input type="checkbox"/> Share Documents with Clients <input type="checkbox"/> New Features to Record Client Email Addresses <input type="checkbox"/> Viewing IDEXX Pet Health Network Pro Activities on Reports
Communications Management for Email and Fax	<input type="checkbox"/> Overview <input type="checkbox"/> Emailing or Faxing Documents from the Cornerstone Editor <input type="checkbox"/> Viewing Communication in the Patient Clipboard* Window <input type="checkbox"/> Viewing the Communications Log <input type="checkbox"/> Accessing the Communications Log
Next Appointment Scheduling Reminder	<input type="checkbox"/> Scheduling an appointment using the reminder
Additional Client Information Enhancements	<input type="checkbox"/> New Features to Help Record Client Email Addresses <input type="checkbox"/> Appointment confirmations shows staff who entered confirmation
Linking Documents to Diagnosis Codes	<input type="checkbox"/> Automatically Printing a Linked "Diagnosis Document" from a Medical Note
LifeLearn® ClientEd Online™ Integration with Cornerstone	<input type="checkbox"/> Customizing and Editing Your Library of ClientEd Online Documents <input type="checkbox"/> Selecting a LifeLearn Document from the Start New Document Window <input type="checkbox"/> Other Ways to Use LifeLearn ClientEd Documents with Cornerstone
Laboratory	
VetConnect* PLUS	<input type="checkbox"/> Overview <input type="checkbox"/> Understanding the VetConnect PLUS Tab
IDEXX VetLab* Station	<input type="checkbox"/> Select an IDEXX VetLab Station when requesting a test
Antech Diagnostics® Module	<input type="checkbox"/> Overview <input type="checkbox"/> Viewing and Updating Profiles <input type="checkbox"/> Ordering a Profile <input type="checkbox"/> Updating a Pending Test Request
Miscellaneous Laboratory Enhancements	<input type="checkbox"/> Specifying Staff IDs for Laboratory Requests <input type="checkbox"/> Result Download and Result Matching <input type="checkbox"/> IDEXX Lab Report <input type="checkbox"/> Linking Cornerstone Values with Laboratory Values

Imaging	
Cornerstone Imaging	<input type="checkbox"/> Enhanced Crop Tool <input type="checkbox"/> Imaging Connections Status Bar
IDEXX Diagnostic Imaging	<input type="checkbox"/> Improved DICOM® Queue
Diagnostic and IDEXX Digital Radiography	<input type="checkbox"/> Changes to the Image Capture Window (Overview) <input type="checkbox"/> Image Coach* Tools <input type="checkbox"/> More Powerful IDEXX I-Vision Mobile* Application
Modality Worklist Integration	<input type="checkbox"/> Overview <input type="checkbox"/> Option to Select a Modality When Creating a New Image Request <input type="checkbox"/> Enhancements to the Image Requests and Results Window <input type="checkbox"/> Resolving Orphan or Not Requested Statuses for a Non-IDEXX Imaging Modality <input type="checkbox"/> Manually Setting Requests to a Status of Completed <input type="checkbox"/> Image Request Special Action Item Report Filtered by Modality
Credit Card Processing	
Electronic Signature Capture with Integrated Payment Solution	<input type="checkbox"/> Capturing the Client Signature at Payment Time <input type="checkbox"/> Posting an Invoice—New Option to Print a Full Invoice or Invoice Receipt <input type="checkbox"/> Identifying Signed Credit Card Transactions on the Patient Clipboard and the Client Account <input type="checkbox"/> Changes to Payment on Account Report
Client Communications	
Communications Management for Email and Fax	<input type="checkbox"/> Overview <input type="checkbox"/> Emailing or Faxing Documents from the Cornerstone Editor <input type="checkbox"/> Viewing Communication in the Patient Clipboard <input type="checkbox"/> Viewing the Communications Log <input type="checkbox"/> Accessing the Communications Log
Linking Documents to Diagnosis Codes	<input type="checkbox"/> Automatically Printing a Linked “Diagnosis Document” from a Medical Note
LifeLearn® ClientEd Online™ Integration with Cornerstone	<input type="checkbox"/> Customizing and Editing Your Library of ClientEd Online Documents <input type="checkbox"/> Selecting a LifeLearn Document from the Start New Document Window <input type="checkbox"/> Other Ways to Use LifeLearn ClientEd Documents with Cornerstone
Referral Relationship Management	
Referral Relationship Management	<input type="checkbox"/> Overview <input type="checkbox"/> Finding and Viewing Referral Veterinarian Information on the Doctor List <input type="checkbox"/> Adding, Editing and Viewing Referral Veterinarian Information on the Doctor Information Window <input type="checkbox"/> Finding and Viewing Referral Hospital Information on the Hospital List <input type="checkbox"/> Adding, Editing, and Viewing Referral Hospital Information on the Hospital Information Window <input type="checkbox"/> Accessing Referral Information and Referral History in Patient Information <input type="checkbox"/> Accessing Referral Information on the Patient Clipboard* Window <input type="checkbox"/> Referral Information on the Patient Check-in/out Window <input type="checkbox"/> Referral Information for Mobile Computing <input type="checkbox"/> New and Enhanced Referral Reports

Inventory	
Enhancements to Cornerstone Inventory Windows	<input type="checkbox"/> Want List <input type="checkbox"/> Purchasing Work List <input type="checkbox"/> Purchase Order List <input type="checkbox"/> Create Purchase Order <input type="checkbox"/> Item Information Tabs <input type="checkbox"/> Search for Inventory Item <input type="checkbox"/> New Invoice Item Grid Sort and Display Options
Electronic Inventory Ordering with IDEXX SmartOrder* Inventory Solution and MWI® Veterinary Supply	<input type="checkbox"/> Creating an MWI Purchase Order in Cornerstone <input type="checkbox"/> Adding Vendor Item IDs for Matching Inventory Items in Cornerstone <input type="checkbox"/> Adding a Vendor Item ID While Working with Inventory Orders <input type="checkbox"/> Tracking Order Statuses from Cornerstone <input type="checkbox"/> Synchronization of Electronic Inventory Orders with MWI
Miscellaneous	<input type="checkbox"/> Login/Password Management <input type="checkbox"/> New Database and Services Management Window <input type="checkbox"/> Additional Changes and Enhancements

Training Files

Work with the Cornerstone tutorial training files data to complete exercises that mimic everyday tasks in your practice without jeopardizing the integrity of your real medical records. You can access the training files from the Microsoft® Windows start menu. Select **Start > Programs > Cornerstone > Training Files**.

Cornerstone opens, and uses the training files database rather than the live version of the database that contains your practice's information.

In the training files (including the Cornerstone Assistant training files), functionality is limited for some Cornerstone 8.3 features which ordinarily communicate with systems outside of Cornerstone:

- **Pet Health Network Pro**—You can see and use Pet Health Network Pro features like the share button and the IDEXX Message Center alerts for appointment requests; however, these actions won't be reflected on pethealthnetworkpro.com or petly.com.
- **Inventory Ordering using IDEXX SmartOrder with MWI Veterinary Supply**—Although you can't use IDEXX SmartOrder, you can view the windows used for working with this feature. Also, Purchase Order 1000 in the training files shows an example of a purchase order created using IDEXX SmartOrder.
- **IDEXX Faxing Service**—Although you can't send faxes from the training files with the IDEXX Faxing Service, this feature is very close to the new email feature that is usable in the training files. Also, completed faxes are shown on the Communications Log in the training files.
- **Antech Diagnostics Module**—A training version of this module is not available in the training files. However, training is included when you purchase the Antech module or upgrade from the previous version of the module.
- **Lifelearn ClientEd Online**—You can only set up and synchronize Cornerstone with LifeLearn ClientEd Online documents from your live Cornerstone database.

- **VetConnect PLUS**—You can view VetConnect PLUS information for the following patients:
 - Zeke—Patient ID 15329 (Feline)
 - Blake—Patient ID 3679K-1 (Canine)
 - Twister—Patient ID 120Q-1 (Canine)
- **Electronic signature capture for the integrated payment solution with XCharge®**—In the training files, you can view XCharge features except the ability to capture electronic signatures.
- **Activation**—You cannot activate or set up any of the above features from the training files, only from your live Cornerstone database. Also, in the configuration windows for a multi-location single database environment, the training files do not allow you to apply primary settings to a secondary practice.

[Click here to jump back to the Quick View Checklist.](#)

Appendix: Starting and Stopping the Database

Starting and Stopping the Database

The database can only be opened or closed from the server. The database is the only thing required to be running on the server; the Cornerstone software does not need to be running. If the database is not open, workstations will not be able to access Cornerstone.

The Cornerstone database is the storage location for your data and is housed on the Cornerstone server. It records information that you enter during your daily activities.

Automatic Start

When you start the server, the Cornerstone database and IDEXX services (related background programs) will start automatically in the background:

- You won't see anything happening.
- You don't need to click any icons on your desktop to start the database.
- Once Windows has started on the server, you can open the Cornerstone software on any computer on your Cornerstone network.

Manual Stopping and Starting the Database

In the course of general daily operation, you should not need to manually stop or start the database.

1. Click Cornerstone Database Server . The IDEXX Database and Services window appears.
2. Click Stop to stop the database and services or click Start to start them. A series of stopping or starting messages appear. When the process is done, you'll see the word *Finished* on the left, and all of the services on the right will be either stopped or started.
3. and displays a list of starting and stopping activities. After a few moments, the Starting Cornerstone Database message appears, along with a second window. This second window closes automatically, and the IDEXX Database and Services window displays several starting messages, followed by the word *Finished*.
4. Click **Minimize** (–) in the upper right of the window to close it. Only do this after Finished is displayed.

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