

Apteryx Onboarding Guide



WELCOME TO THE Apteryx Onboarding Guide

We're excited to welcome you to Apteryx. This resource is designed to help your dental office confidently onboard, set up, and begin using the software. Whether you're transitioning from another platform or starting fresh, this guide will walk you through each step to ensure a smooth and successful onboarding experience.

Purpose of the Guide

The goal of this guide is to support your team throughout the onboarding and configuration of Apteryx. It offers clear documentation and resources to help you stay organized, install the system, and transition smoothly into daily use. You can also rely on it as a reference throughout your onboarding journey, with key items to review before meetings and revisit during calls.

Who Should Use This Guide

This guide is intended for anyone involved in the Apteryx onboarding process. This includes:

- **Dental professionals** who will use the system daily
- **Project leads** managing the rollout
- **Operational leads** coordinating timelines and team responsibilities
- **Technical teams** supporting the system setup and configuration

How To Use This Guide

Think of this as your roadmap for the Apteryx onboarding process. It provides helpful resources, outlines what to expect during each phase, and keeps your team aligned with assigned tasks. Several sections are designed to help you prepare for meetings, so reviewing them ahead of time will support productive discussions and informed decisions. You'll also find homework items—tasks your team completes independently between onboarding calls.

If you need help or something isn't covered, your Implementation Coordinator (IC) is available to support you.

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Preparing for Onboarding

This section gives you a clear overview of how your Apteryx onboarding will be organized and supported.

Objectives:

- **Understand your Planet DDS resources**
Meet the Planet DDS team involved during implementation and post go live.
- **Define your internal team**
Identify key roles on your side and what each person is responsible for.
- **Get familiar with the onboarding phases**
Review the structure of your journey and what happens in each phase.
- **Learn how to unlock strategic value**
See how our governance framework supports long-term success.
- **Track milestones**
Reference key checkpoints from start to finish.
- **Prepare for change**
Learn how to support your team through organizational change.



Your Planet DDS Support Teams

IMPLEMENTATION

Implementation

- Main point of contact
- Schedules meetings and tracks action items to completion

Conversion

- Responsible for image conversions from your existing systems

Imaging

- Technical team to help with hardware installations and image quality calibrations

Training

- Self-guided learning and facilitator-led guided practice sessions

POST LIVE

Account Management

- Ongoing support and resources to optimize your imaging journey

Support

- Dedicated resources for any questions or troubleshooting needs

It's a Team Effort: Client Resource Needs

PROJECT LEAD

- Primary contact for implementation team
- Complete system setup for account and practices
- Ensure team is adhering to milestones and deadlines
- Attend setup and implementation sessions to ensure successful onboarding

CLINICAL LEAD

- Complete image conversion audit
 - Confirm patient record opens when bridged
 - Confirm images appear in layouts as expected
 - Complete image quality audit
- Assist with clinical and imaging configuration

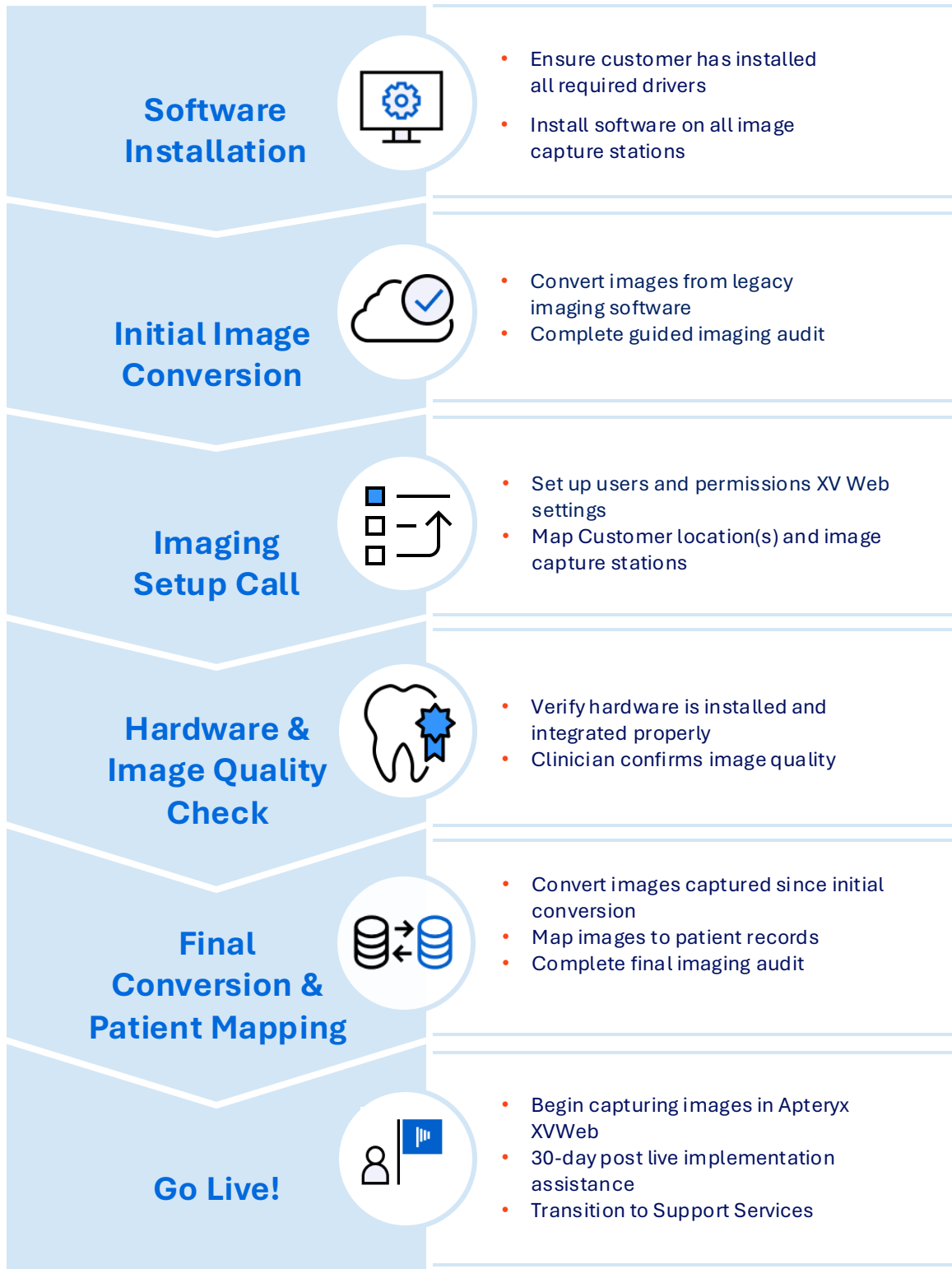
OPERATIONS LEAD

- Understands, adapts, and develops standardized practice workflows
- Partner with Planet DDS team to develop training approach and plan
- Ensures team completion of Apteryx Learning Center learning paths
- Ensure teams participate in guided practice session

TECHNICAL EXPERT (IT)

- Assists with image conversions from legacy platforms
- Work with Planet DDS to install imaging software and test hardware
- Provide technical support during implementation and post-live maintenance

Customer Onboarding Journey



Conversion Policy

Embarking on a conversion from your legacy PM system to Planet DDS Denticon or Cloud 9 software is an exciting journey towards enhanced efficiency and modernized operations. To ensure a smooth transition, it's crucial to adhere to our policies regarding data extraction, cancellation, and rescheduling of appointments. Following these guidelines will help avoid unnecessary delays and additional costs, enabling you to successfully implement your new software.

Every customer's data is different and has evolved over time. We need your data to set realistic goals and timelines, your Implementation Coordinator will be instrumental to you in defining and committing to due dates. Data received late from your existing PMS vendor may delay the go-live date, so proper planning and communication is essential.

Communication

Denticon customers should include **implementation@planetdds.com** on any communication regarding your data extracts (trial extract, final extract, or your final data upload) so a representative from the implementation team can assist you.

Cloud 9 customers should include **cloud9implementations@planetdds.com** on any communication regarding your data extracts (trial extract, final extract, or your final data upload) so a representative from the implementation team can assist you.

Please don't hesitate to reach out throughout your implementation if you have any questions or concerns.

Data Extract Late Policy

Clients who do not connect the Planet DDS team or provide required data more than 20 minutes after the data capture appointment will be charged a \$175 fee and will be required to reschedule the capture time.

Any rescheduled data captures will be scheduled based on current availability which could impact your selected go live.

Cancelling or Rescheduling Final

Rescheduling or cancellations must be submitted in writing. If notice is provided less than 14 business days before the go-live date, a one-time fee of \$1,000 per conversion will be applied.

Rescheduled data captures will be arranged based on current availability. Clients unable to provide final data by the scheduled data pull date will incur the specified surcharges

Cancelling or Rescheduling Trial

Rescheduling or cancellations of a Trial Data Extract less than 24 hours prior to the scheduled appointment will result in a one-time \$175 fee per location.

Rescheduling or cancellations of a Trial Data Conversion after conversion is in process will be charged a one-time \$175 fee per location.

Deadline to Add Extracts to Calendar

To minimize disruption to clients and allow our conversion team time to plan appropriate resources to ensure the best conversion results, the data conversion schedule locks every Thursday at 11:59pm PT for the following week; this means we will not add new conversions to the calendar for the following week beyond the mentioned deadline.

Data Conversion Timing

Our standard conversion timeline is 7-9 weeks.

Our standard conversion checklists specify the data points that are converted for each Practice Management System. Any data points not included in the standard checklist will require custom programming. Please note that not all custom programming requests can be fulfilled, as they depend on the availability and integrity of data from the source system.

Custom programming requests will be assessed by our Conversion team, who will provide an estimate of the applicable fees to research and program and an adjusted timeline for the go-live date.

Blackout Periods

Below is a list of Federal Holidays Planet DDS observes where we do not process conversions or complete data extracts. Your assigned implementation coordinator can give you specific closure dates based on the current calendar year.

- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day
- Christmas Day
- New Year's Day

Managing Organizational Change

Switching to a new practice management system can be a challenging step forward. Thoughtful planning and communication can make the transition smoother. Our change management approach ensures your team stays informed, supported, and ready for success.

Key Recommendations

Build a Communication Plan

Keep partners and stakeholders aligned with clear, consistent updates.

Establish Governance

Set up processes for clinical, operational, and system requests, including SOPs.

Manage Escalations

Surface and resolve issues quickly before they affect your practice.

Share Updates

Share regular progress reports and key milestones.

Manage through Change

Proactively address concerns and support staff through change.

Celebrate Wins

Build momentum by recognizing progress and success.

Our Approach

Evaluate Readiness

Assess each office's readiness to adopt Apteryx. Use metrics to group and sequence offices for early wins and long-term success.

Tailor Strategies

Customize plans based on each office's needs. Identify champions, address concerns, and promote inclusion, education, and outreach.

Mitigate Risks

Identify adoption risks and create strategies that build confidence and ensure a smooth transition.

Managing Organizational Change

Communication Plan

To ensure a smooth Apteryx rollout, we keep all stakeholders informed, engaged, and prepared:

- Share goals like improved patient care, streamlined admin tasks, stronger compliance, and better billing accuracy.
- Highlight training opportunities and the support available before, during, and after go-live.
- Show how standardized processes create long-term efficiency and value.
- For equity partners, reinforce the benefits of scaling on a unified platform.

Together, we'll drive adoption, build confidence, and celebrate milestones as your practice moves forward with Apteryx.

Check out our e-books:

**Change Management for
DSOs and Dental Group:
Laying the Groundwork**

[Read Now](#)

**Change Management for
DSOs and Dental Groups:
Leading Teams Through
Transition**

[Read Now](#)



Understanding Your Software Billing

As the next step in your onboarding process, please use the link below to schedule a **Billing Onboarding** meeting with our billing team.

[Schedule a Meeting](#)

During this session, we will:

- Confirm your billing email address
- Verify your payment information
- Answer any billing-related questions you may have



Prior to the meeting, our billing team will be sending you an email with your customer portal login information. This email will come from ar@planetdds.com. Please ensure you can log in prior to the scheduled meeting.

Scheduling this session promptly will help ensure your account setup is smooth and your billing information is accurate from the start.

SETUP

Getting Aptyeryx Ready

During the onboarding process, we will have a Setup call. During this call we will:

- **Configure Aptyeryx XVWeb**
Set up the imaging software to match your practice's workflow.
- **Map Capture Stations**
Assign imaging devices to their respective stations.
- **Configure Locations**
Define and organize practice locations within the system.
- **Image Quality Check**
Verify image clarity and consistency across devices.
- **Provide Troubleshooting Resources**
Share tools and guidance for resolving common issues.
- **Share Best Practice Recommendations**
Offer tips to optimize performance and user experience.



Implementation Prep Checklist

To ensure a successful Go Live, follow these steps to prepare for key events:

Software Installation & Capture Device Setup

- ❑ Log workstations in as ADMIN for software download.
- ❑ Reset XVWeb login credentials in preparation for appointment.
- ❑ Install drivers for capture devices (refer to the manufacturer)
- ❑ Ensure a Technical Expert is available to connect the Planet DDS Install Technician for software installation and hardware checks.
- ❑ Ensure a Clinical Lead (preferably a Clinician) attends the meeting to approve image quality.

XVWeb Setup & Configuration

- ❑ Bring a user list with proposed roles and permissions.
- ❑ Bring a capture station (workstation) list, including computer names.

Imaging Database Conversions (Initial and Final)

- ❑ Know where the existing image folders are stored.
- ❑ Be prepared to connect the Conversion Technician to the server via LogMeIn123.com.
- ❑ Have any required passwords ready.
- ❑ Verify appropriate amount of storage space available on the server.
- ❑ Disable sleep/restart settings for the duration of the conversion.
- ❑ Assign a Clinical Lead to complete the audit after the initial conversion is completed.

Image Conversion Audits (Initial and Final)

- ❑ Compile a list of 15 patient names with images that have had recent appointments for auditing.
- ❑ Ensure meeting attendee has access to the legacy imaging software and Apteryx imaging site.

Patient ID Mapping

- ❑ Verify legacy imaging software has bridge setup with at least 4 of these 5 data fields without manual input: First name, Last Name, Birthdate, Gender, PMS ID Number
- ❑ Contact your Practice Management System if an Excel export of patient IDs is required.

End User Training

Pre-Training:

- ❑ Complete XVWeb Learning Path before Shared Guided Practice Session.
- ❑ Download Microsoft Teams on 1 - 2 capture stations prior to training session (if applicable)
- ❑ Ensure all team members attend Guided Practice and have XVWeb login credentials on hand.

Post Training:

- ❑ Participate in Training Q&A

Go Live

- ❑ Call (949)482-2541 for 30-day Post Go Live Implementation troubleshooting
- ❑ Transition to General Support after 30 days

Understanding Drivers vs Extensions

How Hardware Drivers and Software Extensions Work Together in Your Imaging Workflow

What is a Driver?

A **driver** is software provided by your hardware manufacturer that lets your computer's operating system (Windows) recognize and communicate with the physical device.

- Enables communication between the device and your computer
- Required for the device to function at all
- Must be installed first

Examples: Imaging device driver, printer driver, keyboard or mouse driver



What is an Extension?

An **extension** (sometimes called a plugin) connects your imaging device to our software. It ensures that captured images display correctly and work within our system.

- Translates device output into a format our software understands
- Installed after the driver
- Essential for full software compatibility

Examples: Direct Video Extension, Gendex Extension



Putting it All Together

To get your imaging device working smoothly with our software, you need both a driver and an extension:

- The driver helps your computer (Windows) recognize and talk to the device.
- The extension allows our imaging software to communicate with the device and display the images correctly.

Think of it this way:

- The driver is the translator for your computer.
- The extension is the translator for our software.

You need both for a smooth and functional experience.

Understanding Drivers vs Extensions

TWAIN is a separate method that some devices use to connect to imaging software. While it works for basic scanning, it often lacks the full functionality that extensions provide.

Feature/Aspect	Driver	Extension/ Plugin	TWAIN
Purpose	Allows Windows to recognize and communicate with the device	Connects the hardware (via driver) to our imaging software	Acts as a universal driver interface for imaging devices
Who Provides it	Hardware manufacturer	Planet DDS or integration team	Device manufacturer (often bundled)
Required For	Windows to detect and use the hardware	Our software to use and control the hardware	Some older devices using TWAIN protocol
Installation Timing	Installed first	Installed after driver	During or after driver setup
Typical Devices	Sensors, pan units	Devices with drivers needing software control	Legacy Scanners, Cameras
Visible to Windows?	Yes; in Device Manager	No; only in Imaging Software	Sometimes; as a Scanning Source
Example	Dexis IXS Driver	Gendex Extension	GXTwain

XVWeb Installation & Image Quality Check

System Requirements

- 2.0 GHz or higher processor (faster is always better, especially for servers)
- 4GB of RAM (again, more is always better)
- 500 GB Hard Drive
- CD-R/DVDR Drive
- 100/1000Mbps or higher Local Area Network (TCP/IP preferred)

Pre-Installation Prep

1. Connection & Communication

- Provide the best phone number for the technician to reach you at the time of your appointment.
- The technician will call you and guide you through connecting to each workstation via LogMeIn123.com.

2. Administrator Access

- Log into each workstation as an Administrator. This access is required to install software and device drivers.
- Need help? [How do I log on as an administrator? – Microsoft Support](#).

3. XVWeb Login Credentials

- Confirm that your XVWeb login credentials are accessible and reset, if needed.
- Denticon clients: Ensure your installation contact also has Denticon login credentials.
- If you haven't received login instructions, contact your company administrator or review: [XVWeb Login Instructions – Apteryx](#).

4. Device Driver Preparation

Imaging devices (e.g., sensors, intraoral cameras) require specific drivers to function with Windows and XVWeb.

- If previously used, drivers may already be installed but could need updates.
- If not yet installed, download the latest drivers from your device manufacturer before the appointment.

XVWeb Installation & Image Quality Check

5. Device Specific Image Quality Settings

Post-capture image filters are per sensor brand, per workstation.

- Please refer to the following Support article for help setting up device specific settings for XVCapture – [XVCapture Device Specific Settings](#).
- For XVWeb Capture please follow this link – [XVWeb Capture Device Specific Settings](#)

Important: Device driver installation is not in the scope of the Install appointment, and the install technician will not be able to assist with driver installation. We strongly recommend having your internal IT support available during the appointment, as admin permissions may be required to install or update drivers.

6. Who Should Attend

- A team member with admin access to all workstations.
- An IT representative, if available, to assist with network or permission-related issues.
- If the install contact is remote or unfamiliar with the hardware, have a clinical team member (e.g., dental assistant) available to assist with image testing.

Installation & Testing

What to Expect

At the start of your appointment, the technician will:

- Call your designated contact and request remote access to all workstations.
- Guide the connection process (one by one or all at once, depending on your setup).
- Install and configure XVWeb on each applicable computer.

Estimated Time: 15–30 minutes per workstation, depending on performance and setup.

What We'll Do

- Install XVWeb and necessary device extensions.
- Confirm functionality of imaging devices by performing test captures on each connected workstation, **when possible**.
 - *(This confirms sensor connection and image return only)*

Client Responsibilities

- Power on all workstations before the appointment.
- Ensure the designated contact is available to grant remote access and assist as needed.
- Close unnecessary applications to improve system performance.
- Confirm each workstation meets minimum system requirements.

A short walkthrough will follow to confirm functionality and answer immediate questions.

XVWeb Installation & Image Quality Check

Post Install Image Quality Check

This appointment occurs separately and must be completed before your go-live date.

Hardware Check Overview

The technician will confirm that all imaging hardware is properly integrated with XVWeb by:

- Capturing test images with each device connected to your workstations.
 - *Example:* If Operatory 1 uses Sensor Brand X, Brand Y, and an intraoral camera, test images will be captured with each device.
- Adjust settings to align with your office's imaging workflow and preferences.

Estimated Time: 1 hour, but it can take longer depending on devices

Who Should Be Present

- A staff member familiar with imaging equipment (e.g., office manager, lead assistant).
- A licensed clinician or decision-maker to review and approve image quality.
- A staff member who is able to capture images using the software.

Please note: If a licensed clinician or decision-maker is not available to join the Image Quality Check appointment, the appointment will need to be rescheduled, and a \$175 rescheduling fee will be incurred.

Image Quality Check

To ensure the system is ready for clinical use, the technician will:

- Assist your team in capturing X-rays on real teeth using each applicable device.
- Adjust XVWeb filters and settings to match or improve previous image quality.

Image Quality Note: Our goal is to provide diagnostic quality while attempting to produce image quality as close to your previous imaging software as possible. While we will work closely with your team to optimize the settings within XVWeb, **we cannot guarantee that image quality will be improved**, as there are many external factors—such as exposure settings, hardware condition, and room setup—that directly influence imaging results. Please note that **our team's scope is limited to software installation and configuration**.

For additional reference, please review the **Image Quality Guide** here:

- [Image Quality Article – Apteryx Imaging](#)

Important:

- Default image filters may differ from your previous software.
- Once image quality is approved on the first workstation, our technician can replicate the final settings across the remaining workstations. However, it is always recommended to test each workstation individually, when possible, to ensure optimal performance.

XVWeb Installation & Image Quality Check

- **Typodonts or inanimate objects will not suffice**—a live capture of human dentition is required for accurate image quality evaluation.

Important: Any time imaging software or hardware changes occur, we recommend reviewing your X-ray generator settings. Proper exposure time is critical for image quality. Please use the attached **Exposure Reference Chart** to verify that your settings match your equipment and fall within recommended guidelines **prior to your appointment**. Adjustments may be needed for optimal results.

MFR.	Model	kV/mA	Adult		Child	
			Anterior	Posterior	Anterior	Posterior
			Anterior	Posterior	Anterior	Posterior
Progeny	Preva	65*/7	.080-.125	.125-.200	.040-.064	.064-.100
Sirona	Heliodent Plus	70*/7	.06-.10	.10-.16	.04-.06	.04-.08
Sirona	Heliodent DS	60/7	.08-.12	.12-.20	.04-.06	.04-.10
Gendex	765DC/Expert DC	65/7	.080-.125	.125-.200	.040-.063	.040-.100
Gendex	770	70/7	6-7 Pulses	7-10 Pulses	4-5 Pulses	5-7 Pulses
PlanMeca	Intra	66*/8*	.080-.120	.120-.200	.040-.080	.040-.100
Belmont	Belray	70/7*	.06-.10	.10-.16	.04-.06	.04-.08
Aribex	NOMAD	60/2.5	.34-.40	.40-.50	.25-.30	.30-.36
Aribex	NOMAD Pro2	60/2.5	.34-.40	.40-.50	.25-.30	.30-.36
Air Techniques		See MFR	.06-.08	0.1	See MFR	See MFR
Trex Trophy		3 RVG	.07-.08	0.1	See MFR	See MFR
Lumix		65kV	0.04	0.05	See MFR	See MFR
Kavo	Focus	Click Here				

XVWeb Installation & Image Quality Check

Clinician Sign-Off Required

A licensed clinician must review and confirm that captured images meet diagnostic standards. This approval is necessary to finalize the image quality check and proceed with go-live.

Best Practices for Success

- Connect and power on all imaging hardware before the appointment.
- Have a patient or staff member available for live image testing.
- Have IT contact (if applicable) available if needed for technical assistance during sessions.
- Inform the technician of any prior imaging preferences or known issues.

Reference Materials and Helpful Links

- [**Capture Knowledge Base Articles**](#)
- [**XVWeb Device Integration List**](#)
- [**XVWeb System Requirements**](#)
- [**Supported Operating Systems**](#)

XVWeb Installation Checklist

- Confirm administrator access for software and device driver installation
- Confirm XVWeb and/or Denticon login credentials are accessible
- Ensure imaging device drivers are already installed (if applicable)
- Ensure internal IT support is available for driver installation or updates and/or permission-related issues (if applicable)
- If the install contact is remote or unfamiliar with the hardware, have a clinical team member available to assist with image testing and confirm image return
- Confirm XVWeb installed and configured on each applicable workstation
- Ensure bridge is configured (if applicable)

XVWeb Installation & Image Quality Check

XVWeb Image Quality Checklist

- Confirm drivers are updated by IT contact (if applicable depending on sensor)
- Confirm captured images meet diagnostic standards and are comparable to legacy imaging software
- Capture X-rays on patients/volunteers using each relevant device
- Licensed clinician has reviewed and approved image quality
- Adjust XVWeb filters and settings to closely match your previous software's image quality
- Check that each workstation returns images after your IT Team completes the driver updates
- Duplicate any image quality settings on any other workstations (if applicable)

Important: Make sure a licensed clinician has reviewed and approved image quality!



What to Expect: XVWeb Imaging Setup Call

Purpose: This session is designed to walk your team through the configuration of your XVWeb imaging software. Our goal is to make sure your team is aligned on the processes for managing user accounts and configuring capture stations. In addition, you will understand which image layouts are available to your team for use and how to create your own layouts when needed. We will also review the process of completing a conversion audit.

What Will Be Covered

User Roles & Permissions:

- Overview of user types and how to assign the right privileges for your team's workflow.
- Best practices for managing users and maintaining security.

Location & Capture Station Setup:

- How to add, edit, or remove office locations in XVWeb.
- Assigning imaging devices (capture stations) to specific locations for accurate data mapping and analytics.

Customization Options:

- Ways to tailor layouts, image enhancements, and site settings to fit your clinical needs.
- Guidance on assigning a decision-maker for customization to keep your workflow streamlined.

Imaging Conversion Audit:

- What to expect from the data conversion process.
- Steps for completing initial and final audits to ensure your imaging data is accurate and complete.

What You'll Gain

- A clear understanding of the onboarding process and your role in it.
- Knowledge of how to manage users, locations, and devices in XVWeb.
- Resources and best practices for customizing your imaging workflow.
- Confidence that your data conversion will be handled accurately and securely.

How to Prepare

- Please have your key team members (IT, clinical leads, office managers) attend the call.
- Bring any questions about your current imaging workflow or data conversion needs.
- Review your current user list and location setup in advance and bring a list of your capture workstation names to the meeting.

We are committed to making your transition to XVWeb Imaging as seamless as possible. If you have any questions before the meeting, please let us know.

XVWeb User Accounts – Best Practices

The following are recommended best practices for a successful XVWeb implementation:

User Types

XVWeb accounts start with a single Admin. Clients create additional users and manage permissions.

- **Admin Account:** Full privileges; cannot be deleted or restricted.
- **Standard User:** Customizable set privileges.
- **Temporary User:** Limited-time access with query privilege; optional export access.

Privileges Overview

- **Admin:** Full site control, user management.
- **Query:** Search patients and data.
- **Share:** Share patients/studies (not for AD FS).
- **Export:** Download images and share links.
- **Print:** Print images or series.
- **Capture/Import:** Add new images to patient records.
- **Edit:** Modify patient/study/series metadata.

User Account Best Practices:

- Use unique email and password per user or location.
- Avoid shared accounts or passwords.
- Limit admin access to essential personnel.
- Avoid reusing passwords from other systems.
- Document account ownership clearly.
- Remove unused accounts promptly.
- Use clear and consistent naming conventions.
- Review user accounts regularly.
- Educate users on account security.
- Change passwords at regular intervals.



XVWeb User Accounts – FAQs

Frequently Asked Questions:

- **Why create multiple users?**
Better security, accountability, and flexibility.
- **Do I need a user for every team member?**
Not necessarily, but at least one user per location is recommended.
- **Does each user need a unique email address?**
Yes, for recovery purposes. Multiple users can share the same email if necessary.
- **What privileges should full admin user have selected?**
Assigning the Admin privilege does not automatically grant all system capabilities. For a user to function as a true administrator with full access, all privileges should be selected in addition to Admin.



Installation & Setup Resources

- [XVWeb Capture Knowledge Base Articles](#)
- [XVWeb Device Integration List](#)
- [XVWeb System Requirements](#)
- [Supported Operating Systems](#)
- [Predefined Layouts for XVCapture, XVWeb, and XVWeb Capture – Apteryx](#)
- [Best Practice for Capture Station Naming and Location Assignment in XVWeb – Apteryx](#)
- [Creating Users in XVWeb](#)
- [XVWeb User Roles and Privileges](#)



Troubleshooting Resources

- [XVWeb Troubleshooting Guide](#)
- [Unmatched Patients after Conversion – Apteryx](#)
- [XVCapture + XVWeb Layouts - Troubleshooting FAQ – Apteryx](#)
- [Managing XVWeb Site Locations – Apteryx](#)

CONVERSION

Bringing Your Images Over

In this section, we'll focus on your **imaging conversion**. We will:

- Walk through the **initial image conversion** process and complete **image audit**.
- Proceed to the **final image conversion** and complete **final image audit**.
- Walk through how to find **images** before they are **mapped** to your **patient records**.

These steps ensure your practice starts with a **complete and reliable system**.



Image Conversion Instructions

PRE-CONVERSION

Remember to check your email for the LogMeIn credentials that will be needed to get our image conversion technician connected to start the process. The code will be sent 12 to 24 hours before the appointment time. The code you will receive will be active for 24 hours. Please contact the technician prior to the start of your appointment time. The tech will NOT be calling the office to get connected.

DURING CONVERSION

This conversion can be completed while the office is still seeing patients. However, it is important that no one tries to use the server/computer at all, either directly or remotely, while the conversion is running.

The conversion tech will need to be connected by the start time of the appointment. Any delays may result in the appointment needing to be rescheduled. The conversion can take a few hours to a few weeks.

Please let the IT contact leading the conversion know that they will need to provide the following information before the conversion appointment time:

- The operating system used on the server (32bit or 64bit)
- Location of the old image database on the server
- Size of the old image folder on the server
- Amount of free space on the server
- If there is not 1.5x the size of the old image folder free, identify a location where images should be stored during conversion.
- If you have connected the imaging team using a remote desktop application, PLEASE DO NOT CLOSE THE WINDOW. Closing the window will close the session and stop the conversion.
- Please ensure that the screen to the server or computer where the images are stored stays on at all times during the conversion.
- Our image conversion team needs the ability to watch the progress/status during the conversion process, so make sure the screen does not lock. If it does, your team will need to unlock it for them to gain visibility again. This may result in the technician sending a new LogMeIn code to get reconnected.
- Your computer should not go to sleep after a certain time-out period, restart, or shut down at the end of the day. If the computer restarts, logs out completely or goes to sleep, then the conversion is stopped and no longer running. This will delay your conversion!

POST CONVERSION

After the conversion has been completed, your implementation coordinator will schedule a time to review and complete the audit form with you. Completing and returning this audit form is a critical step in the conversion process. To avoid needing additional conversion and associated conversion fees, please ensure you are capturing images ONLY with Apteryx imaging software once the final conversion has started.

Note: If your final conversion starts on Friday and/or runs into the weekend, someone should be available to help us get connected and reconnect if we get disconnected. If we are disconnected and unable to reconnect, this could result in a delayed conversion and subsequent delay in your target go-live date.

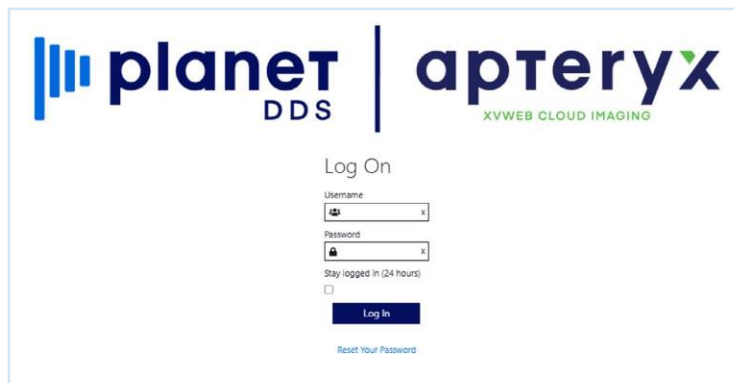
Imaging Audit

You will need the following to complete your imaging audit:

- Access to your Apteryx Imaging site. The URL is typically sent to you via email and should include your temporary login information. Please reach out to your implementation coordinator or our support team if you need assistance with this.
- Access to your original imaging software.
- The Imaging Client Audit Form sent by our conversion team for notation. (We recommend printing this document, so it is easily accessible)
- List of 15 patient names with images that have had recent appointments

STEP 1

Open your internet browser, go to your Apteryx Imaging URL, and sign in using your login details.



planet DDS | apteryx XWEB CLOUD IMAGING

Log On

Username

Password

Stay logged in (24 hours)

[Log In](#)

[Reset Your Password](#)

STEP 2

On the search screen of your Apteryx Imaging, initiate a blank search by clicking the Search button without entering any criteria. This will display a list of patients transferred from your original imaging software. Quickly scan through the list to identify any duplicate patients. (Note: a few duplicates may occur and are not always problematic, as they can result from duplicates in Denticon or your previous imaging system.)



planet DDS | apteryx XWEB CLOUD IMAGING

Primary Id First Name Last Name Date of birth Gender Modality

Please select...

[Search](#) [Clear](#) [Import](#) [XVCapture](#) [Shortcuts](#) [Capture](#)

STEP 3

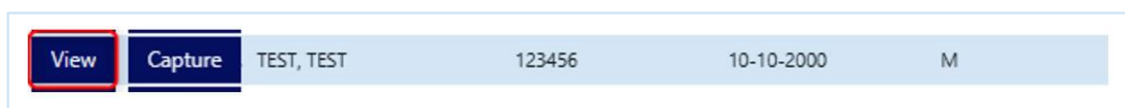
Using the audit document containing your patient list, locate your first patient by their last name. After finding the patient, confirm that the following details correspond with those in your previous imaging software and are accurate:

- Patient's full name, date of birth, and gender

If any information is inaccurate or the patient cannot be found, please record this in the comment section of your audit form.

STEP 4

Access the patient's images in Apteryx Imaging by clicking the "View" button located to the far left of the patient's name.



STEP 5

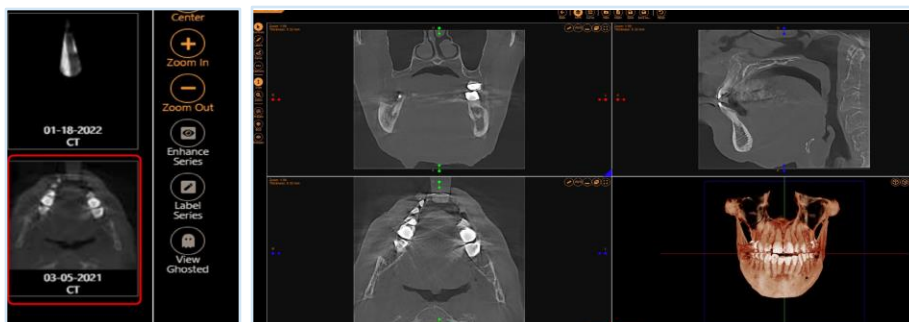
From the view screen in Apteryx Imaging, review the image preview bar on the left side of the screen. Compare this to your previous imaging software to ensure all images are present and correct. Notate the audit form with any discrepancies.



We recommend checking the following:

- Single images and series (bwx, fmx, pan, etc.) are present
- Dates of images are correct and match previous software
- Series template positions and orientation are correct
- Image quality of converted images is comparable to previous software.

If your practice is converting CBCT's, please left click on the study on the left side of the screen and allow the software to load the CT.



Imaging Audit Guide

Your Implementation Coordinator will schedule a call to review audit instructions and guide you through the imaging auditing process.

You will receive a PDF copy of the document shown below, which will guide you through your imaging audit.

Check Patient-Specific Information for Each Item Below																
Patient Image Audit	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Comments:
Patient Information	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	
Patient present as expected																
Patient Name																
Patient ID																
Birthdate																
Gender																
All single images present																
All series images present																
All image capture dates correct																
Series template positions correct																
Series orientations correct																
3D CBCT open properly																

Learning and Adoption

Our Imaging training program offers a **flexible blend of self-paced learning and virtual guided sessions** designed to support users throughout their onboarding.

Learners gain hands-on experience with core workflows in a collaborative environment, while post-training resources and support ensure continued success beyond the classroom.



Apteryx Learning

Overview

Our training program is designed to give your team confidence from day one. Through self-paced eLearning, guided live sessions, and ongoing support, you'll have the tools and resources needed to learn and succeed. This program builds a strong foundation, provides hands-on practice, and ensures your team is ready to apply knowledge with confidence.

Step 1: Self-Paced Learning in Apteryx Learning Center

- Access comprehensive eLearning courses for all users.
- Includes interactive, click-through tutorials for hands-on workflow practice.
- Covers foundational concepts to prepare your team for live sessions.
- Available on-demand for flexibility and convenience.

Step 2: Guided Training Sessions

- Attend live learning sessions tailored to your training package (e.g., front office, clinical).
- Join a hands-on Apteryx guided practice session led by an Imaging expert.
- Focuses on reinforcing Learning Center concepts and providing real-time practice.
- Includes role-based workshops, deep dives, and Q&A for collaboration.
- Structured agenda to ensure consistency across teams.

Step 3: Ongoing Support

- Access the Apteryx Help Portal for articles, videos, and searchable “how-to” content. Continuous updates and quick answers help reinforce learning and keep teams confident.
- Attend our live Q&A sessions as needed for additional support.

Access the **Live Learning Session Schedule** [here!](#)



Go Live Preparation

As we move closer to go-live, preparation is key to making the transition smooth and successful. We'll start by:

- Ensuring all onboarding milestones have been completed including software installation, setup and conversions.
- Sharing available resources to support and guide you and your team throughout the process.



Go Live Planning for Legacy Software

Unmatched Patients During Go Live

To ensure a smooth Go Live, this guide outlines a proactive approach for managing imaging data that may still be in transition when you Go Live.



Learn More Here:
[Unmatched Patients after Conversion - Apteryx](#)



Staff Awareness of Incomplete Data Conversion

- **Critical Understanding**
To ensure a smooth Go-Live, it's critical that staff understand: **Some imaging data may not be fully converted yet.**
- **Proactive Solution**
This process is designed to proactively identify and address those missing images before they affect patient care.

Recommended Proactive Approach

To improve readiness and reduce surprises, consider the following steps:

- 1. Designate a Legacy Workstation**
Select one workstation at the office to retain access to the legacy software configuration. This will serve as a reference point for locating any images that were not converted or mapped. Ideally this is not a capture station to reduce the possibility of adding data to the legacy software.
- 2. Assign a Go-Live Image Auditor**
Assign a dedicated individual to perform an image audit during Go Live.
- 3. Audit Scheduled Patients**
Review the schedule for your Go Live date in the new PMS. For each patient:
 - Attempt to locate their images in the new system.
 - If expected images are missing, document the patient's name.
- 4. Early Arrival Recommendation**
Recommend arriving 1 hour early on Go Live day to validate patient images and ensure the office is set up for success.
- 5. Compile and Review Missing Image List**
After auditing all scheduled patients:
 - Compile a list of patients with missing images.
 - Prepare this list for discussion during the morning huddle.
- 6. Clinician Review**
During a morning huddle, have the appropriate clinicians review the list of patients and verify their images in the legacy system.

Optional: Repeat this or a similar process as needed until the Final Conversion and Data Mapping are complete.



We're Upgrading for You!



This office is transitioning to Aptyrx
a modern, cloud-based system from Planet DDS.

Why the Change?

Aptyrx helps us deliver faster, smarter, and more personalized care —
all while streamlining our work behind the scenes.

What This Means for You

You may notice a few extra steps or brief delays as our team gets familiar with
the new system. We appreciate your patience and support as we make this
exciting upgrade!

Better Systems. Better Care.

We're committed to making your experience even better —
and Aptyrx helps us do just that.

Thank you for bearing with us during this transition.

We're excited about what's ahead —
and grateful to have you with us!

Powered by



Live on Apteryx!

As we wrap up onboarding, our goal is to make sure you feel fully supported as you transition into ongoing use of Apteryx. We'll start by:

- Reviewing our 30-day post live implementation support model.
- Reviewing the **handoff process** to our Support team, so you know exactly where to go for help and guidance.

These steps help set you up for **long-term success**.



Post Go Live Support: What to Expect

As you go live with our products, we want to ensure your transition is smooth, successful, and fully supported. That's why your Implementation Coordinator will continue to work closely with you for 30 days after go live to finalize all implementation activities.

Continued Support from Your Implementation Coordinator

For the first 30 days post go live, your Implementation Coordinator will:

- Address any outstanding setup or configuration needs
- Ensure all implementation tasks are completed
- This dedicated support period is designed to give you confidence and continuity as you begin using our products in a live environment.

Transition to Post Live Support

- After 30 days, you'll transition to our **Post Live Support Model**, which includes:
 - Access to our expert Support Team
 - Self-service resources and knowledge base
 - Ongoing customer success check-ins

We're here to support you every step of the way—from onboarding to long-term success!





This certifies that
Your Dental Office
has
SUCCESSFULLY COMPLETED
IMPLEMENTATION
of Planet DDS software

Date _____



Apteryx Support Overview

When Should I Contact Imaging Support?

Contact Denticon support for any of the following reasons listed below. If you have an imaging specific issue or question, please contact Apteryx imaging support.

Issue Type	Details
Technical Issues	Problems with software you cannot resolve on your own.
Product Questions	“How to” questions about features or processes.
Billing Questions	Questions about invoices or billing.
Service Interruptions	Outage or partial loss of service affecting product use.
Feedback	Suggestions or feedback about features or functionality.
Additional Training	Additional remote or on-site training needs.
Data Needs	Questions regarding how to access or obtain data.

When Should I Contact Imaging Support?

Contact Apteryx support for any of the following reasons listed below. If you have an imaging specific issue or question, please contact Apteryx imaging support.

Issue Type	Details
Technical Issues	Problems with software you cannot resolve on your own.
Account Problems	Trouble logging in or resetting your password.
Product Questions	“How to” questions about features or processes.
Billing Questions	Questions about invoices or billing.
Service Interruptions	Outage or partial loss of service affecting product use.
Feedback	Suggestions or feedback about features or functionality.
<u>Image Capture Failure</u>	Issues capturing images with a particular device and getting it to display in our capture software.
Image Transfer Failures	Image is captured and visible on local computer, but not in XVWeb.
Image Quality non-diagnostic	Image quality is non-diagnostic, and you need assistance improving the image quality.
Out of Tokens	Cannot launch XVCapture due to insufficient licenses or computer names changed. Support can release tokens for you.
Cannot find images	Cannot find images due to insufficient legacy data, incomplete data mapping, or image acquired under wrong patient.
Image Capture Templates/Layouts	Images do not capture or display in an order or orientation that the user is expecting.
Patient Bridging issues	Unable to launch imaging software with patient data automatically transferring from Practice Management Software. Or if the bridge works, but no/incorrect data is being passed to the imaging software, potentially resulting in duplicate patient records with different IDs.
Apteryx Analytics	Unexpected results in the Apteryx Analytics dashboard.
AI Overlay issues	AI Features not working as expected.

Ticket Priority & Definitions

Priority	Definition & Examples
Critical Inoperability	Prevents access, no workaround (e.g., can't login).
Issue Hindering Workflow	Major feature impacted, workaround exists.
How To/Integration	Minimal loss, inquiry into product capabilities.
General Question	Feedback, minor errors, workaround exists.

Best Practices for Submitting a Ticket:

- Include full error messages and steps taken.
- Specify affected hardware and provide screenshots.
- For patient-specific issues, include examples.

Support Resources & How to Contact Support

Support Hours & Channels

Apteryx Support:

Monday – Friday, 7 a.m. – 8 p.m. EST

Support Portal:

<https://apteryximaging.planetdds.com/hc/en-us>

Tickets created after hours will be triaged the next business morning.

Apteryx Support Overview

How to Enter a Support Ticket

Apteryx:

1. Go to <https://apteryximaging.planetdds.com/hc/en-us>
2. Click 'Submit a request'
3. Enter email, phone number, priority, subject, description
4. Select 'Apteryx' in the 'Request For' dropdown
5. Attach relevant files

Support Resources

- Apteryx New Customer FAQ: [New Client Guide](#)
- Apteryx Academy: <https://apteryxacademy.learnupon.com/>



XVWeb Links & Resources

XVWeb Links

[System Requirements](#)

[Hardware Plugins/Extensions and Simulator Download](#)

[XVCapture New Workstation Walk-Through](#)

[Imaging Database Conversion Process](#)

[Image Conversion Audit Form](#)

[Apteryx Learning Center](#)

[How Does XVWeb Protect my Data?](#)

XVWeb Support Resources

[XVWeb Login and Support Instructions](#)

[Submit a Support Request Ticket](#)

[XVWeb Status Page](#)

[Apteryx Knowledgebase](#)

[Apteryx Frequently Asked Questions](#)

Billing/FAQs

[Apteryx Billing Questions | Planet DDS](#)

[Apteryx Customer Portal \(Billing\)](#): Your Customer/Account ID is located on your invoice. Click reset password on the main page of the customer portal and a password will be sent.

Integrations

This section provides informational resources to help you get familiar with Planet DDS and our advanced system features available for use with Aptyeryx.

Objectives:

- **Review Planet DDS Integrations**
Planet DDS offers features like AI Assist, Pearl, and Aptyeryx Analytics Dashboard to enhance your workflows.



AI Assist

Elevating clinical standards across your organization.

Empower Your Clinicians with Smarter, More Consistent Diagnostics

AI Assist, powered by Pearl, ensures that every patient receives the highest standard of care across all your locations. Directly integrated into Denticon's interface, this AI-powered solution standardizes diagnostics, enhances clinical consistency, and helps your team deliver better outcomes—every time.

The Challenges You Face



Inconsistent Standards of Care

With varying clinical approaches, ensuring uniformity in diagnostics and treatments across locations can feel like an uphill battle.



Missed Diagnoses, Missed Opportunities

Manual processes increase the risk of critical errors, impacting patient outcomes and losing revenue potential.



Balancing Clinical Excellence with Operational Efficiency

It's hard to optimize care quality without tools that also improve workflow efficiency for busy clinicians.

How AI Assist Can Help



Consistent, High-Quality Care Across Locations

Standardizes diagnostics across all locations, helping clinicians identify treatment opportunities with confidence and ensuring every patient receives exceptional care.



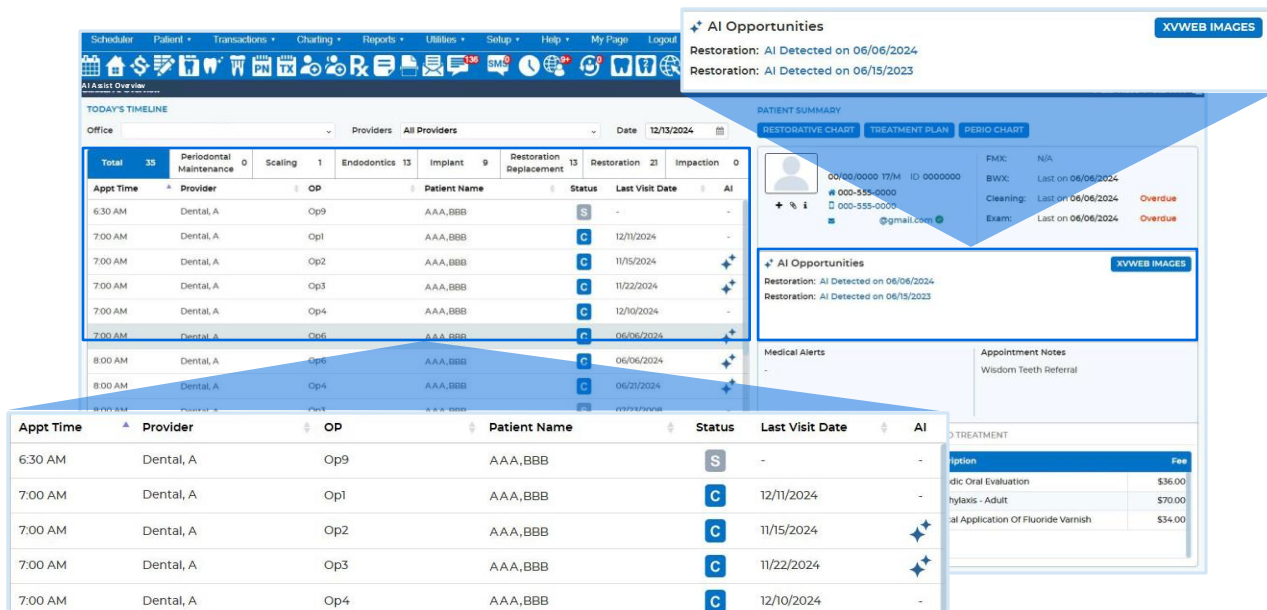
Proactive, AI-Powered Support

Automatically surfaces potential diagnoses and treatment needs, reducing missed opportunities, improving outcomes, and building patient trust.



Seamless Workflow Integration

Embedded directly into Denticon, the tool consolidates patient data, imaging, and AI findings into one interface—eliminating friction in the clinical process.



AI Assist scans patients who have appointments, up to 7 days in advance to look for treatment opportunities.

POWERED BY *pearl*

The Future of Dentistry, Powered by AI

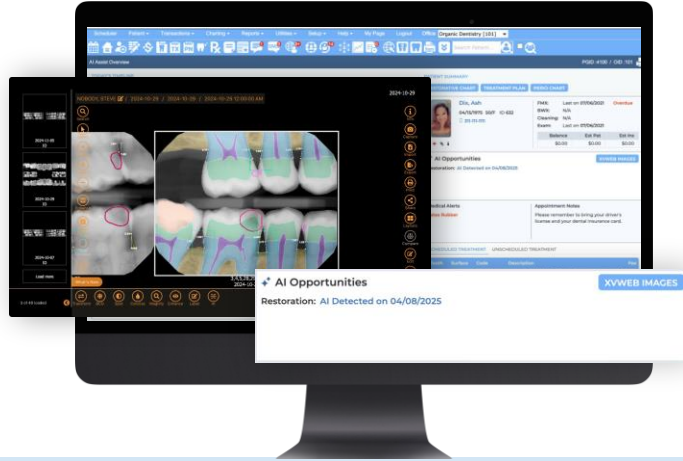
Pearl is the first FDA-cleared AI capable of reading and identifying diseases in dental x-rays, with regulatory clearance in 120 countries. Its precise, real-time diagnostics empower clinicians to make accurate decisions, reduce missed diagnoses, and improve patient outcomes. Trusted globally, Pearl sets the standard for diagnostic excellence in dentistry.

[LEARN MORE AT PEARL](#)

“ AI Assist helps clinicians feel more confident in diagnosing cases and improves how we communicate with patients—it’s made a real difference across all our locations. ”

ROD GANJIFARD
VP of Technology, Onsite Dental

Build Consistency. Deliver Excellence.



Pearl & Planet DDS

Pearl AI has partnered with Planet DDS to develop a successful project plan for conversion, training, implementations and support to Pearl’s award-winning and best-in-class Radiographic Artificial Intelligence Suite of products.

Migration Plan to Include:

- Full Project Scope and Proposal for Entire Organization
- Workflow Analysis
- Customized Training
- Metric-driven Customer Success Program

Pearl is the world’s largest dental artificial intelligence software solution

200+ employees

Deployed in 120+ countries

30+ Integrations with leading dental practice management and imaging solutions

Comprehensive AI-driven product suite



Pearl’s mission is to positively impact billions of lives by elevating the standard of care in the dental industry.

Why Pearl?

Enhanced Diagnostic Accuracy

Pearl is the first FDA-cleared radiographic AI solution that uses advanced computer vision to identify issues often missed by the human eye, leading to more precise diagnoses and better treatment planning.

Natively Integrated with Planet DDS

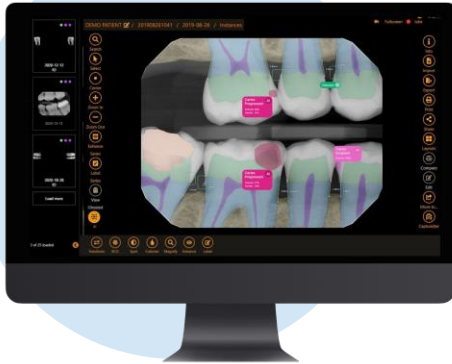
Seamlessly integrate Pearl’s AI Suite into your Planet DDS workflow. When an x-ray is taken, Second Opinion will automatically populate within the system, ensuring 100% utilization.

Increased Efficiency

By automating image analysis, Pearl AI reduces time spent on diagnostics, allowing dental professionals to focus more on patient care.

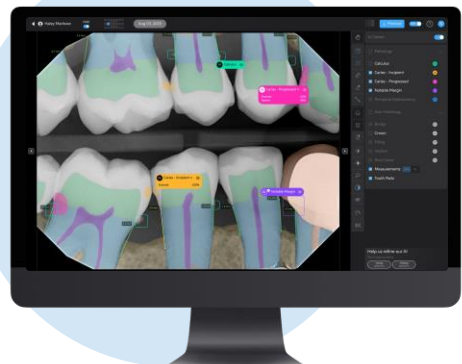
Cost Effectiveness

By reducing misdiagnosis and unnecessary treatments, helps Pearl AI DSOs save on costs and improve overall practice efficiency.



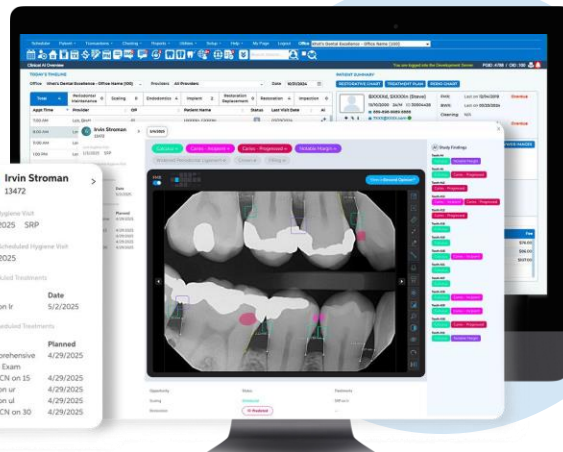
AI Essentials

XVWeb Overlay, which includes Second Opinion embedded directly into XVWeb. With settings default-on, clinicians can access AI insights within the imaging software and ensure 100% utilization of Pearl’s Second Opinion product.



AI Plus

XVWeb Overlay and Second Opinion Cloud Software, offering both in-platform AI and full access to the cloud platform for enhanced image review and functionality.



AI Premier

XVWeb Overlay, Second Opinion Cloud Software, Practice Intelligence, and the AI Assist module, brings diagnostic accuracy, operational insights, and workflow efficiency into one seamless experience. From instant, default-on AI detections in XVWeb to performance analytics that uncover trends in case acceptance and production, and real-time guidance in Denticon to support diagnostics, care planning, and scheduling, these tools work together to elevate care quality, streamline operations, and drive growth across every location.

[List of Integrations](#)

[FDA Clearances](#)

[Terms & Conditions](#)

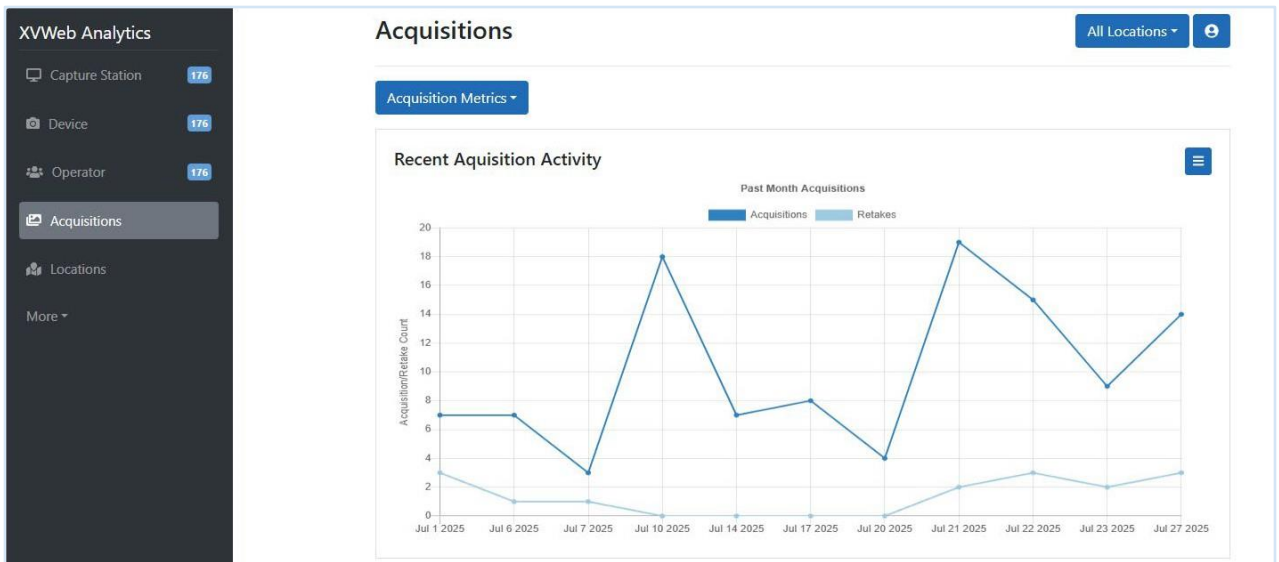
[Pearl Insights & Case Studies](#)

Apteryx Analytics Dashboard

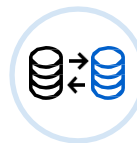
Turn imaging data into better care at scale

The **Apteryx Analytics Dashboard**, embedded within XWeb, gives practices and DSOs the visibility they need to improve imaging performance. By tracking retakes, spotting coaching opportunities, and guiding equipment decisions, the dashboard helps standardize quality across locations, reduce unnecessary exposure, and save valuable time on reporting.

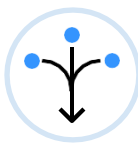
THE CHALLENGES YOU FACE	HOW THE DASHBOARD HELPS
<p>Retakes keep happening, wasting time and creating liability.</p>	 <p>Spot Retake Trends</p> <p>Identify retake frequency by user, device, or location to reduce unnecessary exposure.</p>
<p>Without data, managers miss opportunities to identify who needs coaching.</p>	 <p>Coach with Confidence</p> <p>Pinpoint where staff or sites need training support.</p>
<p>Equipment decisions feel like expensive guesswork.</p>	 <p>Decide with Data</p> <p>Use device-level performance trends to guide repairs and upgrades.</p>
<p>Leaders are chasing spreadsheets instead of acting on insights.</p>	 <p>Simplify Reporting</p> <p>Access ready-to-use metrics that save time and enable faster decisions.</p>



Built into XVWeb
No extra logins or training



Exportable Data
Pull CVS reports instantly



Granular Filters
View by operator, device, or location



Admin-only Access
Secure with existing credentials

Powered by Planet DDS

Trusted by **13,000+ practices** and more than half of the top 60 DSOs, Planet DDS hosts **1.7 billion images** and manages **1.2+ petabytes of data**. The Apteryx Analytics Dashboard is built on this proven foundation to help practices improve imaging quality and consistency at scale.

See the BIG Picture