CS PracticeWorks Practice Management Software

Installation Guide
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Installing the CS PracticeWorks Practice Management Software

This document describes the procedures for installing the CS PracticeWorks practice management software, version 7.6. The procedures vary slightly depending on your office configuration and whether this is the first time you are installing PracticeWorks on your network.

Read this document carefully before installing the new software.

**Important:** If you are using a WAN, Microsoft Windows Terminal Server software, or more than one database, contact Technical Support before proceeding with this installation!

**Accessing This Guide Electronically**

When you install PracticeWorks, electronic versions of this guide and other related documentation are installed on your computer. To access these electronic documents, follow these steps:

1. On the Microsoft Windows taskbar, click **Start**.
2. Select **All Programs > PracticeWorks > Documentation**.
3. Select a document from the drop-down list.

The electronic documents are in PDF file format and can be opened with Adobe Reader software. If the Adobe Reader software is not installed on your computer, follow these steps:

1. On the Microsoft Windows taskbar, click **Start**.
2. Select **All Programs > PracticeWorks > Documentation > Install Acrobat Reader**.
3. Follow the onscreen instructions to install the software.

**Important:** Each time you install an update of this software, the online documentation folder is deleted and replaced with a folder containing the latest versions of online documentation. Do not store important files in this folder.

**Accessing Online Help**

To access the Microsoft Windows operating system online help, select **Start > Help and Support** from your Windows taskbar. To access the PracticeWorks online help after the software is installed, select **Help > Help** from the main menu.

You can also use the **Help** menu to access **System Requirements** and **MasterWorks Web Training**.
Getting Started

Before you install PracticeWorks, make sure that each computer in your network meets the minimum system requirements. For information about system requirements, see the System Requirements documentation shipped with your software.

Setting Your Monitor Resolution

Your monitor resolution must be set to at least 800 x 600 with small fonts or normal fonts. A screen resolution of 1024 x 768 is recommended.

Mapping Your Server Disk Drive

In a single-user environment, you must perform a server installation. A multi-user environment requires both server and workstation installations. The server is the host computer on which PracticeWorks and system data are installed. A workstation is a computer on which the software is installed and must connect to the server to access system data.

Share the server's hard drive and map a drive on each workstation running the software to the drive. For more information on sharing and mapping drives and folders, see the documentation and online Help provided with your Windows operating system.

Note: To install the full version of PracticeWorks, see “Performing a New PracticeWorks Installation on Your Server” on page 4 or “Performing an Upgrade of PracticeWorks” on page 14.

Backing Up Data

Before you install the software, you should back up your data. For information about backing up data, see the documentation provided by your backup media vendor.

With a typical installation of PracticeWorks, patient information, treatment records, billing, and A/R records are stored in the DATA folder of the server computer: C:\PWORKS\Data

If your system is configured to store images or other important files in a different location or on a different computer, make arrangements to back up those folders as well.

Since individual configurations can vary, verify the location of this folder and any other essential folders with the technician who installs and maintains your backup system.
Previewing the Updated Features

If you want to preview the updates and enhancements incorporated into this version of the software, you can watch a video from the CD. Your computer must have a sound card to use speakers or headphones to hear the audio that accompanies the video.

To run the Release Overview video, follow these steps:

1. Verify that all other programs on the server are closed and insert the PracticeWorks CD in the CD-ROM drive of the server. The **PracticeWorks Installer Menu** window is displayed.

   ![PracticeWorks Installer Menu Window](image)

   **Figure 1** PracticeWorks Installer Menu Window

   If this window is not displayed, begin the installation by selecting **Start > Run** from the Microsoft Windows software taskbar and typing `D:\Setup.exe`. If your CD-ROM drive is assigned a different letter, substitute that letter for `D`.

2. Select **Preview Update Features**. The video is launched.

3. After you have viewed the video, click **Close**. The **PracticeWorks Installer Menu** window is displayed.
Performing a New PracticeWorks Installation on Your Server

The first step in setting up PracticeWorks is installing the Pervasive PSQL data management software on the server. After you have installed Pervasive, you can then install PracticeWorks onto the server computer. Finally, perform a workstation installation for any other computers that are used to access the software.

Installing the Pervasive PSQL Software on Your Server

Before installing the Pervasive PSQL data management software, note the following:

- If this is a new installation of PracticeWorks, see “Installing the Pervasive PSQL Server for Windows Software” on page 4 to install the server version of the Pervasive PSQL software.

- If you are upgrading your software and a compatible version of Pervasive software is installed on the server, see “Performing an Upgrade of PracticeWorks” on page 14.

- If you are upgrading your software and a compatible version of Pervasive software is NOT installed on the server, specifically if you have the Microsoft Vista operating system on your network and do not yet have Pervasive v 9.5 or newer installed, see “Installing the Pervasive PSQL Server for Windows Software” on page 4 to install the compatible version.

- If you are unsure if your database software is compatible with PracticeWorks, version 7.6, or whether to install the latest version of Pervasive PSQl, see the PracticeWorks System Requirements, Version 7.6 document.

Installing the Pervasive PSQL Server for Windows Software

To install the Pervasive PSQL data management software on your server, follow these steps:

1. Verify that all programs on the server are closed and insert the Pervasive PSQL database CD in the CD-ROM drive of the server. The PracticeWorks Installer Menu window is displayed.
2 Select **Install Pervasive PSQL v11 SP1 and WSetup Components**. An important message is displayed.

![Pervasive PSQL v11 Product Key Message](image)

**Figure 3  Pervasive PSQL v11 Product Key Message**

3 Read the message and click **OK**. The **Welcome to the InstallShield Wizard for Pervasive PSQL v11 Server Engine (32-bit) SP1** window is displayed.

![Welcome to the InstallShield Wizard for Pervasive PSQL v11 Server Engine (32-bit) SP1 Window](image)

**Figure 4  Welcome to the InstallShield Wizard for Pervasive PSQL v11 Server Engine (32-bit) SP1 Window**

If this window is not displayed, begin the installation by selecting **Start > Run** from the Microsoft Windows software taskbar and typing `D:\Setup.exe`. If your CD-ROM drive is assigned a different letter, substitute that letter for `D`. 
4 Read the welcome message and click **Next**. The **License Agreement** window is displayed.

![License Agreement Window](image1.png)

**Figure 5** License Agreement Window

5 Read the license agreement carefully, select **I accept the terms in the license agreement**, and click **Next**. The **Setup Type** window is displayed.

![Setup Type Window](image2.png)

**Figure 6** Setup Type Window
To install all program features, select **Complete** and click **Next**. The **Ready to Install the Program** window is displayed.

![Ready to Install the Program Window](image)

**Figure 7  Ready to Install the Program Window**

**Note:** If a version of this software is detected by the installer, a message is displayed to inform you that the existing software is being upgraded to this version.

To begin the software installation, click **Install**. The **Installing PSQL** window is displayed.

![Installing PSQL Window](image)

**Figure 8  Installing PSQL Window**
After the installation is complete, the **InstallShield Wizard Completed** window is displayed.

![InstallShield Wizard Completed Window](image)

**Figure 9** InstallShield Wizard Completed Window

8 Click **Next**. The **PSQL Authorization** window is displayed.

![PSQL Authorization Window](image)

**Figure 10** PSQL Authorization Window

9 Enter the PSQL product key provided on the label of the software envelope.

> **Important**: You must enter the product key *exactly* as it is displayed on the label. If the key is entered incorrectly, you will have problems accessing PracticeWorks.

10 Click **Authorize**. The **Pervasive PSQL v11 Installation Utility** window is displayed, followed by a message when the installation is complete.
11 Click **OK**. You are prompted to restart your computer.

12 Click **OK**.

**Note:** If you do not have Internet access on this computer, call a Carestream Dental technical support representative for assistance activating your Pervasive license.

### Installing PracticeWorks on Your Server

Perform this procedure if you are installing the software for the first time. This sets up the server’s database and is referred to as the data installation. The data installation is performed only on the server. After the data installation is complete, you can install the workstation program files on the server.

Before attempting to install the software, note the following:

- If there is an existing copy of the software on your server, see “Performing an Upgrade of PracticeWorks” on page 14.

- Ensure that Pervasive PSQL software is installed on the server before proceeding. To install the software, see “Installing the Pervasive PSQL Software on Your Server” on page 4.

**Important:** If you are using the Microsoft Windows XP operating system, you must be logged in as a user with administrative rights before performing the data installation.

To complete the initial software data installation, follow these steps:

1 Verify all other programs are closed and insert the PracticeWorks CD in the CD-ROM drive of the server. The **PracticeWorks Installer Menu** window is displayed.

![Figure 11 PracticeWorks Installer Menu Window](image)
If this window is not displayed, begin the installation by selecting **Start > Run** from the Microsoft Windows software taskbar and typing `D:\Setup.exe`. If your CD-ROM drive is assigned a different letter, substitute that letter for D.

2 Select **Install PracticeWorks v7.6**. The **Setup** window is displayed.

3 Wait for the window to close. The **Welcome** window is displayed.

![Welcome Window—Server Setup Program](image)

Figure 12 Welcome Window—Server Setup Program

4 Read the welcome message and click **Next**. The **Choose Destination Location** window is displayed.

![Choose Destination Location Window](image)

Figure 13 Choose Destination Location Window

5 Select a location:

- To install the software in the default directory, **C:\PWORKS**, click **Next**.

- To select a different directory for the software installation, click **Browse**, select the directory from the list, and click **OK**. After the **Choose Destination Location** window is displayed, click **Next**.
The **CS PracticeWorks Practice Management Software Data Installation** window is displayed as the data files are installed, followed by the **CS PracticeWorks Practice Management Software Workstation Installation** window.

After the program files are installed, you are prompted to restart your computer.

6. Click **OK**. When your computer restarts, the **PracticeWorks** icon is displayed on your desktop.

7. Open the software in one of the following ways:
   - Double-click the **PracticeWorks** icon.
   - Select **Start > All Programs > PracticeWorks > PracticeWorks**.

When the software is displayed, you are prompted for your license file.

8. Browse to the location of your license file and click **OK**. The **Registration Reminder** window is displayed.

9. Select **Yes, I want to register now** and click **OK**. The **Registration** window is displayed.

![Figure 14 Registration Window](image)

10. Select your registration preference:
   - To receive your registration code over the Internet, click **Register automatically via the Internet** and click **OK**. The **Registration Code** window is displayed while the code is generated.
   - To receive your registration code over the telephone, select **Contact support by telephone**, click **OK**, and call Customer Support. The **Registration - New** window is displayed. Read the values in the **Customer ID** and **Hardware ID** fields to the support representative.

![Figure 15 Registration - New Window](image)

11. After the representative gives you the registration code, type it in the **Registration Code** field and click **OK**.
Installing PracticeWorks on a Workstation

Installing PracticeWorks on a Workstation

After you have installed the Pervasive PSQL and PracticeWorks software on the server, perform this procedure on each workstation in your practice on which the software is accessed. The PracticeWorks installation process is the same for both versions of the Pervasive PSQL software; however, the companion version of the database software is installed on the workstation to ensure that your data is properly managed.

Before installing PracticeWorks on a workstation, note the following:

- If this is a new installation of PracticeWorks, see “Installing PracticeWorks on a Client Workstation” on this page.
- If an older version of the software exists on a workstation, see “Updating PracticeWorks on a Workstation” on page 19.

Installing PracticeWorks on a Client Workstation

Important: If you are using the Microsoft Windows XP operating system, you must be logged in as a user with administrative rights before performing the data installation. If you are using the Microsoft Vista operating system, Pervasive PSQL software version 9.5 or newer is required.

The PracticeWorks installer will install the Pervasive PSQL software and other necessary files on the computer before installing the PracticeWorks program files.

To install PracticeWorks on a workstation, follow these steps:

1. Exit all other programs and select Start > Run. The Run window is displayed.
2. Click Browse and select the drive mapped to the server on which the software is installed from the drop-down list.
3. Double-click PWORKS > DATA > WSETUP > SETUP.EXE. The selected path is displayed in the Run window.
4. Click OK. A message is displayed informing you that the Pervasive PSQL v11 Client software needs to be installed.
   
   Important: When installing on the Microsoft Vista operating system, the User Account Control (UAC) feature is enacted to prevent the installation of unauthorized applications. The UAC message is displayed for all add-on modules of PracticeWorks, including the voice activation module.

5. Click OK. The Open File - Security Warning window is displayed, asking if you want to run the file.
6. Click Run. Status messages are displayed while the Pervasive files are installed.
   
   A message is displayed informing you that the Pervasive PSQL v11 Workgroup (32-bit) SP1 Setup completed successfully.
7. Click OK. The Open File - Security Warning window is displayed, asking if you want to run the file.
8 Click **Run**. The **Welcome** window for the PracticeWorks workstation installation is displayed.

![Welcome Window](image1)

**Figure 16 Welcome Window—Software Setup Program**

9 Read the welcome message and click **Next**. The **Choose Destination Location** window is displayed.

![Choose Destination Location](image2)

**Figure 17 Choose Destination Location Window**

The folder in which the existing program files are located is displayed in the **Destination Folder** section of the window. The default program files location is **C:\PWORKS**.

10 Review the information and click **Next**. The **PracticeWorks Practice Management Software Workstation Installation** window is displayed. A detailed description of the percentage of program files that have been updated and installed is displayed in the window.
After the program files are installed, the **Setup Complete** window is displayed.

![Setup Complete Window](image)

**Figure 18 Setup Complete Window**

11. Click **Finish**. A message is displayed prompting you to restart your computer.

12. Click **OK**. When your computer restarts, the **PracticeWorks** icon is displayed on your desktop.

13. Double-click the icon to access the software.

**Performing an Upgrade of PracticeWorks**

The first step in upgrading the software is ensuring that you are running a compatible version of the Pervasive PSQL data management software program on the server and workstations. If the data management software is compatible, you can then install PracticeWorks onto the server computer. Finally, perform a workstation installation for any other computers that are used to access the software.

Before attempting to install the software, note the following:

- If you are performing a first-time PracticeWorks installation on the server, see “Performing a New PracticeWorks Installation on Your Server” on page 4.

- Ensure that a compatible version of Pervasive PSQL software is installed on the server. If you are unsure if your software is compatible with PracticeWorks, version 7.6, see the PracticeWorks System Requirements, Version 7.6 document.

- Ensure that you have a valid backup or copy of the entire directory where PracticeWorks program files, subdirectories, and audit trail files are stored.
Updating PracticeWorks on Your Server

Perform this procedure if you are updating from PracticeWorks, version 5.0 or 6.0, to PracticeWorks, version 7.6. Installing this version updates the database and program files on the server.

To upgrade your server, follow these steps:

1. Verify all other programs are closed and insert the PracticeWorks CD in the CD-ROM drive of the server. The PracticeWorks Installer Menu window is displayed.

   Figure 19 PracticeWorks Installer Menu Window

   If this window is not displayed, begin the installation by selecting Start > Run from the Microsoft Windows software taskbar and typing D:\Setup.exe. If your CD-ROM drive is assigned a different letter, substitute that letter for D.

2. Select Install PracticeWorks v7.6. The Setup window is temporarily displayed.
3  Wait for the window to close. The **Welcome** window is displayed.

![Welcome Window](image)

**Figure 20 Welcome Window**

4  Read the welcome message and click **Next**. The **Importance of a good backup** window is displayed.

![Importance of a Good Backup Window](image)

**Figure 21 Importance of a Good Backup Window**

5  Read the document, ensure you have a valid backup, and click **Yes** to continue with the installation.
The **Release Code** window is displayed. You must obtain a release code before continuing the installation.

![Figure 22 Release Code Window](image1)

**Figure 22 Release Code Window**

6 Select your registration preference:

- To receive your release code via the Internet, ensure you have a valid Internet connection, select **Automatically via the Internet**, and click **OK**. The **Release Code** window is displayed while the code is being generated.

- To receive your release code via the telephone, select **Contact support by telephone**, click **OK**, and call Customer Support. The **Release Code** window is displayed. Read the values in the **Product**, **Customer ID**, and **Hardware ID** fields to the support representative. After the representative gives you the release code, type it in the **Release Code** field, and click **OK**.

The **Welcome Window** is displayed.

![Figure 23 Welcome Window—Software Setup Program](image2)

**Figure 23 Welcome Window—Software Setup Program**
7. Read the welcome message and click **Next**. The **Choose Destination Location** window is displayed.

![Image of Choose Destination Location Window](image)

**Figure 24 Choose Destination Location Window**

The folder in which the existing program files are located is displayed in the **Destination Location** section of the window. The default program files location is **C:\PWORKS**.

8. Review the information and click **Next**. The **PracticeWorks Practice Management Software Data Installation** window is displayed. A detailed description of the percentage of program files that have been updated and installed is displayed in the window.

After the program files are installed, the **Setup Complete** window is displayed.

![Image of Setup Complete Window](image)

**Figure 25 Setup Complete Window**

9. Click **Finish**. When your computer restarts, the **PracticeWorks** icon is displayed on your desktop.
Updating PracticeWorks on a Workstation

Before you update your PracticeWorks software on a workstation, install the program files on the server and ensure the hard drive is shared. A network drive must be mapped to the server for each workstation running the software. Additionally, you must perform the update procedure on each workstation running the software.

To upgrade a workstation to PracticeWorks, version 7.6, follow these steps:

1. Ensure that PracticeWorks, version 7.6, is installed on the server.
2. Open PracticeWorks, version 5.0 or 6.0, on the workstation you are updating in one of the following ways:
   - Double-click the PracticeWorks icon on your desktop.
   - Select Start > Programs > PracticeWorks > PracticeWorks.

A message alerts you that a new version of the software is detected and asks if you want to upgrade the workstation is displayed.

3. Click Yes. The Welcome window is displayed.
4. Read the message and click Next. The Choose Destination Location window is displayed.
5. Review the information and click Next. As the workstation files are installed, the PracticeWorks Practice Management Software Workstation Installation window is displayed.

Note: If you have upgraded the version of Pervasive PSQL software on the server, the Information window is displayed informing you that the client software must be installed. After the Pervasive software is installed, the workstation installation resumes, and the PracticeWorks Practice Management Software Workstation Installation window is displayed.

After the workstation program files are installed, you are prompted to restart your computer.

6. Click OK. When your computer restarts, the PracticeWorks icon is displayed on your desktop.
7. Double-click the icon to access the software.
8. Repeat these steps on each workstation on your network.
Installing the PracticeWorks Voice Activation Module

The PracticeWorks voice activation module enables you to use voice commands to control some aspects of the PracticeWorks charting module.

Before installing the voice activation module, verify that the voice activation module is enabled in your license file. If you purchased the module with your initial order of the software, you should have the appropriate license file.

To verify that the voice activation module license is enabled, follow these steps:

1. From the software, select Help > About PracticeWorks. The About window is displayed.
2. Click Show License Details. The License Details window is displayed. If the license is enabled, Yes is displayed next to Voice Activation Module. If the license is not enabled and you want to use the module to use voice commands, contact your Carestream Dental representative before installing the module.

When you install PracticeWorks onto the server computer, the program files for the voice activation module are automatically installed. You must install the voice activation module onto each workstation that is used to perform charting using voice commands.

To install the voice activation module, follow these steps:

1. Ensure that PracticeWorks, version 7.6, is installed, and verify that all programs on the computer are closed.
2. Use the mapped drive to run the Setup.exe file located in the Vsetup directory of the PWORKS folder located on the server. The Setup window is temporarily displayed.
3. Wait for the window to close. The PracticeWorks Voice Activation Module window is displayed. A message informs you that you must have a voice activation module license to use the module.

![Figure 26 PracticeWorks Voice Activation Module Window](image)

Note: If you are using an older operating system, you might be prompted to select the SAPI component for the voice module. It is recommended that you install SAPI 5.1.
4 If you have the appropriate license, click **Yes**. The **Welcome** window is displayed.

![Welcome Window](image1.png)

**Figure 27 Welcome Window**

5 Read the message and click **Next**. After the files are installed, the **Setup Complete** window is displayed.

![Setup Complete Window](image2.png)

**Figure 28 Setup Complete Window**

6 Click **Finish**.
Installing the PracticeWorks Kiosk Check-In Module on a Workstation

A Kiosk workstation must be activated and configured from a standard PracticeWorks workstation. To accommodate this, you must share the Kiosk workstation’s hard drive. For more information on sharing and mapping drives and folders, see the documentation and online Help provided with your Microsoft Windows operating system.

Before installing the Kiosk check-in module, verify that this feature is enabled in your license file. If you purchased the module with your initial order of the software, you should have the appropriate license file.

Important: The Kiosk setup files are placed in the C:\PWORKS\Data\KSetup directory of the PW Server. If you update the software via the Internet, you must share this directory so you can browse to this folder from the Kiosk workstation you are setting up. Since non-employees access Kiosk workstations, permissions for user accounts on these computers should allow access to ONLY the KSetup subdirectory, and not the main PW Data directory above it.

To install the Kiosk check-in module on a computer, follow these steps:

1. Insert the PracticeWorks CD in the CD-ROM drive. The PracticeWorks Installer Menu window is displayed.
2. Select Install PracticeWorks Kiosk. The installer program is launched.
3. Follow the instructions in the installer.

Installing the M2SYS Fingerprint Scanning Module

You must install the M2SYS Fingerprint Scanning module on both the server computer and the workstation computers that use it.

Before installing the M2SYS Fingerprint module, verify that this feature is enabled in your license file. If you purchased the module with your initial order of the software, you should have the appropriate license file.

When you install PracticeWorks, version 7.0.5 or newer, the installation options for the M2SYS Fingerprint module are added to the PracticeWorks menu.

First install the software on the server computer by selecting Start > All Programs > PracticeWorks > Install M2SYS Fingerprint Server. Follow the instructions.

Then select Start > All Programs > PracticeWorks > Install M2SYS Fingerprint Client on each workstation computer that uses this feature. Follow the instructions.