CS SoftDent Practice Management Software
Versions 15.0 And Higher

Technician’s Installation Guide
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Manual Name: CS SoftDent Practice Management Software Technician’s Installation Guide
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About This Guide

This is the CS SoftDent Practice Management Software technician’s packet (tech pack). The CS SoftDent software is a critical systems application that must be running every day with as little down time as possible. In addition to the application, the hardware is critical to ensuring the stability of an automated practice management system.

Please carefully read and follow the installation instructions and recommendations contained within this document. If you have any questions, contact a SoftDent Technical Solutions representative.

To assist you in the installation and maintenance of our product, make yourself familiar with the information contained in the following sections:

- Vendor Stipulations
- Installation Recommendations
- Communication and Support Software
- Configuring the Hardware Environment
- Backing Up the CS SoftDent SQL Database
- Backing Up the CS SoftDent Software Data Files
- Migrating CS SoftDent Software to a New Server
- Performing a Manual Installation
- Extracting Files
- Uninstalling the CS SoftDent Software Components
- Integration Between CS SoftDent Software and KODAK Dental Imaging Software
Vendor Stipulations

The independent vendor is fully responsible for the configuration, installation, and maintenance of the client's computer network. Our company does not support the installed network or its related issues, including printer installations or operations.

The independent vendor is fully responsible for making sure the hardware is configured and the client is trained to save and restore a backup of the CS SoftDent software and system database. Since there are many types of backup programs, SoftDent Technical Solutions Center does not train offices on configuring the backup system or restoring a database. If an office must send data to SoftDent Technical Solutions Center for in-house analysis, send backups on CD/DVD-ROM, External Hard Drives / Flash media, or Internet Transfers. No other forms of backup media are accepted for data analysis. Addendums to installation documents will be made as necessary.

The independent vendor is fully responsible for the support and maintenance of the client's computer network system. Give your clients your contact information and specific instructions to contact you first for system-related problems. Any questions about optimizing the network environment for use with the CS SoftDent software products are also welcome. It is recommended that you be familiar with the client’s Windows operating system and carry an MCSE (Microsoft Certified Systems Engineer) certification or equivalent on staff.

The SoftDent Technical Solutions Center staff is highly trained and capable of assisting you ensure a smooth software/hardware installation and/or systems upgrade. When contacting the Solutions Center, be sure to have the client’s account or phone number ready for the responding technician.

Questions can be e-mailed directly to SoftDentSupport@Carestream.com.
Installation Recommendations

This section provides installation guidelines. All suggestions may not apply to every client.

- Ensure the hardware meets or exceeds the requirements listed in the current CS SoftDent software system requirements, located at:
  

- Purchase only fully tested devices listed on the hardware specifications information sheet. While some non-recommended hardware performs acceptably with CS SoftDent software, it remains the responsibility of the hardware technician to maintain the performance of the non-recommended hardware in question. If you are unsure as to whether a particular device is compatible with the CS SoftDent program, please email SoftDentSupport@Carestream.com or call a Technical Solutions representative at 866-435-7473.

- Train the office staff to configure the backup system to back up the required files for CS SoftDent software. The default directory for the Multi-User version of CS SoftDent software is C:\SoftDent on the server. The default directory for the Client Server version of SoftDent is C:\Server. If the office performs imaging through the CS SoftDent software, including digital x-rays, patient portraits, and intraoral photography, the default directory for the CS SoftDent images are C:\PWImages folders and should be included in the backup configuration.

- SoftDent Technical Solutions Center does not support backup systems configurations or the restoration process. Training the office staff on back-up restoration procedures will increase productivity and decrease service calls.

- Encourage the office staff to keep all SoftDent Technical Solutions Center phone numbers and account information in a convenient location. It is also advised to keep a copy of the latest CS SoftDent software DVD that was shipped to the office onsite. In the event of an emergency, it is critical that they can reach us quickly.

Communication and Support Software

This section provides general guidelines for setting up the communication and support software used to aid with advanced troubleshooting of the CS SoftDent software.

The remote control support communication tool used by the SoftDent Technical Solutions Center is known as Bomgar. Bomgar software is a web based software package that allows the SoftDent Technical Solutions Center to remotely access any computer within the office that is experiencing difficulties regarding CS SoftDent software. The office must have a high-speed internet connection in order to utilize this service. The applicable Bomgar server is located at http://webassist01.carestream.com/. A SoftDent Technical Solutions representative will generate a session key, provide it to the office while they are at the site, and then use that session key to establish a remote session to the computer in question.

Note
To optimize performance, it is best to exceed the minimum requirements for this software.

Important
Incremental backup configurations do not work with the CS SoftDent software database.
Configuring the Hardware Environment

This section provides general guidelines for setting up the hardware environment to run the CS SoftDent software efficiently. All suggestions may not apply to every client.

- Unless expressly stated in the hardware specifications, use commercial class hardware versus consumer class or clone computers.
- Set the monitor’s screen resolution to **1280x1024** pixels or higher to properly display the CS SoftDent software’s information. In addition, set the font size to **Small (96 DPI)** or **Normal (96 DPI)**, depending on the operating system.
- Run the CS SoftDent software only on a wired networking architecture. Wireless networks have not been tested with the software and are not recommended due to interference and latency issues.
- Only install the TCP/IP protocol over the network and at each individual computer.
- Share the **SoftDent** folder with full permissions and security for everyone using the software.
- Disable **Simple File Sharing** on any computer running the Windows XP operating system. If you use Window Vista operating system, disable the **Sharing Wizard**.
- In SoftDent versions 12.5 and prior, use the same letter to map drives for all workstations on which the SoftDent software is installed.
- In SoftDent versions 14.0 and higher, Universal Naming Convention (UNC) paths may used to install and actively use the SoftDent software.
- Configure your hardware and software firewall to open ports 13000 to 13025 internally. In the Client/Server version of the software, also open port 5597. CS SoftDent software sends data across these ports and a firewall could potentially block this data.
- All users should have their own Windows username and password within the network.
- When using Windows XP, give all users Power User or above status on the local computer.
- When using Windows 7 or Windows Vista, make sure that all users executing the CS SoftDent software have their own user name and password. CS SoftDent software will not execute properly under a Guest account.
- Assign all computers running the CS SoftDent software to the same domain or workgroup.
- CS SoftDent is not supported in virtual environments such as VMware or OSX.
- The PracticeWorks License Server must be run within a session zero setting. The PracticeWorks License Server will not execute properly within a Remote Desktop or terminal services session.
- Use a static IP for all computers.
- Point the server and all computers’ primary DNS point to the server, instead of the router.
- Do not map any computer to the administrative shares.
- Exclude the local and network directories for CS SoftDent and Kodak Dental Imaging software (formally known as Trophy) from virus automatic protection. Schedule all virus scans during out-of-office hours. Active virus scans can slow process times in the CS SoftDent and Kodak Dental Imaging software. Auto-protect should also be disabled for all network drives.
- Many anti-virus programs can disconnect network drives when scanning for new virus definition files and when running its quick scan process, this process is known to cause issues with CS SoftDent. This issue is especially prevalent in Norton Anti-Virus version 10.x.
- Make sure that the server has adequate page file sizes.
- Decide to use DNS or a Host file. A host file will replicate itself on all workstations. Don’t manually set DNS on workstation to an external IP.
- Give full control and security permissions to the default server share and folder.
- Add all computers to the same workgroup or domain.
- Do not set the NICs with power management. This turns the NIC off while not in use and can cause network problems.
- Disable Sleep Mode for all operating systems.
- To use the CS SoftDent Software in multi-office environments, a T1 or higher line is required.
- RAID 0 configurations are not recommended. If it is necessary to use RAID, use a RAID 1 or RAID 5 configuration.
- If using the CS SoftDent software within a domain environment make sure that reverse DNS is set up and running properly.
- All servers must have a physical keyboard, mouse, and monitor attached. Ensure that the office is aware of the physical location of the server and that at least one person knows the administrative username and password for the server.
- Offices using the Client Server version of the CS SoftDent software should be attached to an uninterruptable power supply (UPS).
- Make sure that the printer that will be used with the CS SoftDent software uses an actual PCL5e or PCL6 series print driver. Do not use an emulated PCL5e or PCL6 print driver.
• Networks running Windows 7 or Windows 2008 Server may notice increases in overall network speed if Opportunistic Locking is disabled.

• Networks running Server 2008, Server 2012, Windows Vista, Windows 7, or Windows 8 may notice increases in overall network speed when using SoftDent if Auto-Tuning, Remote Differential Compression, IPv6, and Offline Files are disabled. It is recommended to flush the DNS and restart the computer after disabling these features.

• Ensure that the Link & Dual Speed is set to auto-negotiate.

• Ensure that the proper adapter settings and binding order are selected for the network adapter.

• Disable any wireless connections.

• Ensure that the network interface card’s drivers are up to date.

• Notable performance increases have been displayed when the maximum amount of RAM has been installed in servers that serve files to ten or more workstations.

### Backing Up the CS SoftDent SQL Database

The Database Extractor Utility is a small program that allows for “On Demand” backups of the CS SoftDent Software SQL Database to be made. This utility allows the user to set preferences on where the created backup file will be saved as well as how many “archived” backups will be created. Note that the SQL database only exists in versions 15.0 and higher.

Because creating a backup of the SQL database requires several services to be temporarily halted, all users must be logged out of CS SoftDent in order to perform the following process.

#### Running the GUI Version of the Database Extractor

1. Navigate to **Start > Programs > Carestream > Database Extractor Utility**.
2. Manually enter the path to which the backup file will be saved to. Note that for convenience, the backup file can be set to be saved to the SoftDent folder itself. If the office’s backup is configured to capture the entire SoftDent folder, then the backup file will be included automatically. If the backup is configured to only include minimum files, then the office must reconfigure their backup to also include files with the .bak file extension.
3. Set the number of previous backups to keep.
4. Check the option to “Save Settings on Exit”. This will ensure the same settings do not need to be entered each time the extractor utility is run.
5. Click **Extract** to begin the backup process. Upon successful completion, the utility will display a dialog that reads, “The extraction completed successfully”.
6. Click **Exit** to close the Database Extractor Utility. Note that in the specified folder, a .bak file will be created that will be named “PW_DatabaseBackup_YYYYMMDD_001.bak” where “…YYYYMMDD…” indicates...
the year, month, and day the backup was created. The most recent backup will always be named according to this format. Previous backups will have an “Archived_” prefix in the name.

Running the Non-GUI Version of the Database Extractor

The Non-GUI version of the Database Extractor Utility allows for the ability to create an automated task of backing up the database (such as a scheduled Windows task). The non GUI simply runs without needing any interaction from the user and uses the same setting that were put in place by running the GUI version of the utility.

To run the Non-GUI version of the Database Extractor Utility, simply execute the file “DatabaseExtractor.exe” located in the “C:\Program Files\Carestream\DB Extractor” folder.

Backing Up CS SoftDent Software Data Files

It is recommended to back up the server’s entire CS SoftDent database directory as well as the .BAK file that is created by the Database Extractor Utility on daily basis as well as any folders containing images accessed from within CS SoftDent. The listing below displays the minimum set of files and folders that must be backed up to ensure that a valid CS SoftDent database is maintained. SoftDent Technical Solutions Center does not support the process of backing up or restoring data.

<table>
<thead>
<tr>
<th>Directories</th>
<th>File Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>The following directories must be backed up:</td>
<td>The following file types must be backed up:</td>
</tr>
<tr>
<td>Custom</td>
<td>* .bak (Versions 15.0 and higher)</td>
</tr>
<tr>
<td>CCFiles</td>
<td>* .dat</td>
</tr>
<tr>
<td>DBNotes (Versions 14.0 – 14.0.2 Only)</td>
<td>* .idx</td>
</tr>
<tr>
<td>EDIDATA</td>
<td>* .def</td>
</tr>
<tr>
<td>History</td>
<td>* .trl</td>
</tr>
<tr>
<td>Letters</td>
<td>* .sys</td>
</tr>
<tr>
<td>Presentations</td>
<td>* .ini</td>
</tr>
<tr>
<td>Profiles</td>
<td>* .log</td>
</tr>
<tr>
<td>PWImages</td>
<td>* .tra</td>
</tr>
<tr>
<td>PWSvr</td>
<td></td>
</tr>
<tr>
<td>SDImages</td>
<td></td>
</tr>
<tr>
<td>TW (If present within the SoftDent folder)</td>
<td></td>
</tr>
<tr>
<td>X Rays</td>
<td></td>
</tr>
<tr>
<td>SDDB_# (Multi-Database Only)</td>
<td></td>
</tr>
</tbody>
</table>
Migrating SoftDent Software to a New Server

Before moving the CS SoftDent software to a new server, verify the new server meets or exceeds the hardware specifications for the software. Then disable the PracticeWorks License server on the old server before networking the computers.

If the office is storing any images on the old server, the new server must use the same host name as the old server and the images must be placed in the same directory structure as the old server; i.e. d:\PWImages must be d:\PWImages on the new server.

It is strongly recommended that the server name and the share names remain intact when installing a new server. If an office uses imaging and the server and share names are changed an image move will need to be performed and it will also be necessary to have a Technical Solutions representative change the WorkingDirectory registry string on each workstation or SoftDent will not function properly on the workstations. If the server or share names have not been modified, no changes will need to be made on the workstations.

Carestream Dental charges a $1000 fee should an image move need to be performed.

1. Disable the PracticeWorks License Server from running on the old server.
2. On the old server, run the Database Extractor Utility to create a .BAK file of the SQL database.
3. Copy the SoftDent folder, the newly created .BAK file, and any associated image folders to the new server.
4. Install a blank copy of CS SoftDent version 15.0 on the new server.
5. Reboot the server when the installation is complete.
6. Replace the new blank SoftDent folder with the copy of the SoftDent folder that originated on the old server. This should not include the .BAK file. Move any existing image folders to their proper locations on the new server.
7. On the new server, execute the Database Extractor Utility. Restore the most recent .BAK file that was created in step two.
8. Reboot the server after the Database Extractor Utility has completed the restore.
9. When launching the CS SoftDent Software you may be prompted to register the software. If prompted to register or re-register obtain a re-registration code it will be necessary to prepare a fax that will be sent to SoftDent Technical Solutions and displays the following information:
   - Office letterhead
   - Reason for re-registration code (for example, upgrading server)
   - Customer ID
- Hardware ID
- Signature of the doctor
- Return phone and fax numbers

10. Once the registration information is complete, log in to CS SoftDent Software on the server.

Extracting Files

This section provides general information about the manual extraction of CS SoftDent software files from the installation media.

In some cases, a file in the CS SoftDent software might become corrupted and may need to be extracted from the CS SoftDent software installation DVD. This is used primarily as a solution for system file corruption where a new copy of a file might be necessary. This is not generally used as a solution for data corruption, as an extracted data file is blank.

To extract a file from the CS SoftDent software installation DVDs, follow these steps:

1. Insert the DVD into the DVD-ROM drive and exit the automatic installation, leaving the disk in the DVD drive.
2. Select Start > Run and type: <DVD drive letter>:\Sssetup-SoftDent.exe /X
3. Click OK. The file extraction window is displayed.

Uninstalling the CS SoftDent Software

Components

This section provides general information concerning the automatic and manual process for uninstalling components of the CS SoftDent software.

Uninstalling the CS SoftDent Software

The following steps detail the procedure for completely uninstalling CS SoftDent Software Version 15.0 and higher along with the associated 'NextGen' and CS SoftDent components.

Do not uninstall the components without first verifying that the customer has a valid backup of their CS SoftDent data.

1. Open Add / Remove Programs.
2. Remove the NextGen Components in the following order:
   - Carestream Auto-Fail Service
   - Carestream Data Migration Service
   - Carestream Data Retrieval Service
   - Carestream Dental Adapter Host
   - Carestream Dental Agent Host
   - Carestream Subscribe/Publish Service

Note

Choose the file to extract from the list. The displayed listing is in alphabetical order by folder name, while the files within the folders are also in alphabetical order.
• Carestream Dental Application Server
• Scheduler
• Software Update System
• CS SoftDent Software

Uninstalling the PracticeWorks License File Server

It might be necessary to uninstall the PracticeWorks license file server. This is a separate application that allows access to the CS SoftDent software and creates the gold key icon in the system tray. This application runs from the SoftDent\PWsvr folder.

To automatically uninstall the PWSvr.exe file, follow these steps:

1. Select Start > Run and type: PWClient.
2. In the Client Options window, click Options and Uninstall License Server. The PWSvr folder in the CS SoftDent software and the registry keys associated with the License File Server are deleted. The PWSvr registry key is located at HKEY Local Machine > Software > PWInc.

You can disable the PWSvr.exe application manually and then delete the \PWSvr folder and the registry key. You will need the license file disk to re-register the SoftDent software because the License File (PWLF.dat) is deleted along with the \PWSvr folder.

Integration between CS SoftDent Software and KODAK Dental Imaging Software

The prerequisites for setting up KODAK dental imaging software installations are as follows:

1. Install the CS SoftDent software first.

2. Set the CS SoftDent software Image Storage Drive default path located under System > Change System Settings > Video Options to a UNC path that is shared through the network with full control. The path should look similar to the following:

   Global Image DB 0: \server\<one directory below the image location>

3. Share all locations for previous CS SoftDent software SDImages and TW images across the network with full control.

KODAK Dental Imaging Software, Version 6.X or Higher

To integrate SoftDent software and Kodak dental imaging software, follow these steps:

1. Install the CS SoftDent software first.
2. Install the Kodak dental imaging software, version 6.0.4.10 or higher.
3. Select Chart > Options > X-ray > Kodak Dental Imaging.

Note
The PracticeWorks License Key must be running on the server for the CS SoftDent software to run properly.

Note
Remember to copy the PWLF.dat file to an easily accessible storage device or file folder.