

DE200-14

# **KODAK PRACTICEWORKS Practice Management Software**

## **Installation Guide**

# Notice

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# Contents

Accessing This Guide Electronically . . . . .	1
Accessing Online Help . . . . .	1
Getting Started . . . . .	2
Setting Your Monitor Resolution . . . . .	2
Mapping Your Server Disk Drive . . . . .	2
Backing Up Data . . . . .	2
Previewing the Updated Features . . . . .	3
Performing a New PRACTICEWORKS Software Installation on Your Server . . . . .	3
Installing the Pervasive PSQL Software on Your Server . . . . .	4
Installing the Pervasive PSQL Server for Windows Software . . . . .	4
Installing the PRACTICEWORKS Software on Your Server . . . . .	8
Installing the PRACTICEWORKS Software on a Workstation . . . . .	11
Installing the PRACTICEWORKS Software on Client Workstation . . . . .	11
Performing an Upgrade of PRACTICEWORKS Software . . . . .	13
Updating the PRACTICEWORKS Software on Your Server . . . . .	14
Updating the PRACTICEWORKS Software on a Workstation . . . . .	18
Installing the KODAK PRACTICEWORKS Voice Activation Module . . . . .	19
Installing the PRACTICEWORKS KIOSK Check-In Module on a Workstation . . . . .	21
Installing the M2SYS FINGERPRINT Software . . . . .	22



# Installing the KODAK PRACTICEWORKS Practice Management Software

This document describes the procedures for installing the Kodak PracticeWorks practice management software, version 7.0. The procedures vary slightly depending on your office configuration and whether this is the first time you are installing the PracticeWorks software 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 the PracticeWorks software, 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 **Programs > PracticeWorks Software > Online 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 **Programs > PracticeWorks Software > Online 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 software 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**, the **Online Resource Center**, and **Masterworks Web Training**.

## Getting Started

Before you install the PracticeWorks software, 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 the PracticeWorks software 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 Microsoft Windows operating system.



**Note:** To install the full version of the PracticeWorks software, see [“Performing a New PRACTICEWORKS Software Installation on Your Server” on page 3](#) or [“Performing an Upgrade of PRACTICEWORKS Software” on page 13](#).

### 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 the PracticeWorks software, 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.

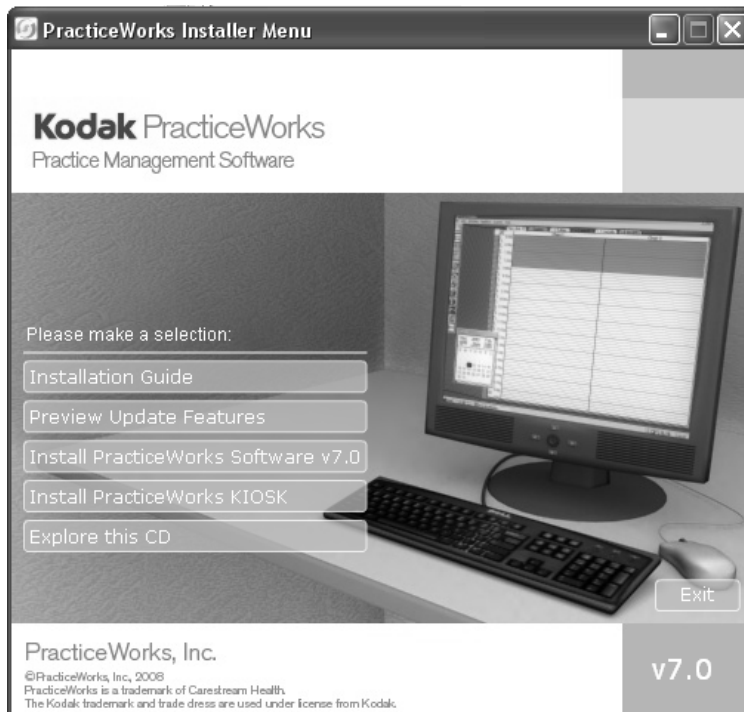
Since individual configurations can vary, verify the location of this folder and any other essential folders with the technician who installs and maintains your backup system.

## 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 software CD in the CD-ROM drive of the server. The **PracticeWorks Installer Menu** window is displayed.



**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 Software Installation on Your Server

The first step in setting up the software is installing the Pervasive PSQL data management software program on the server. After you have installed the data management software, you can then install the PracticeWorks software 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

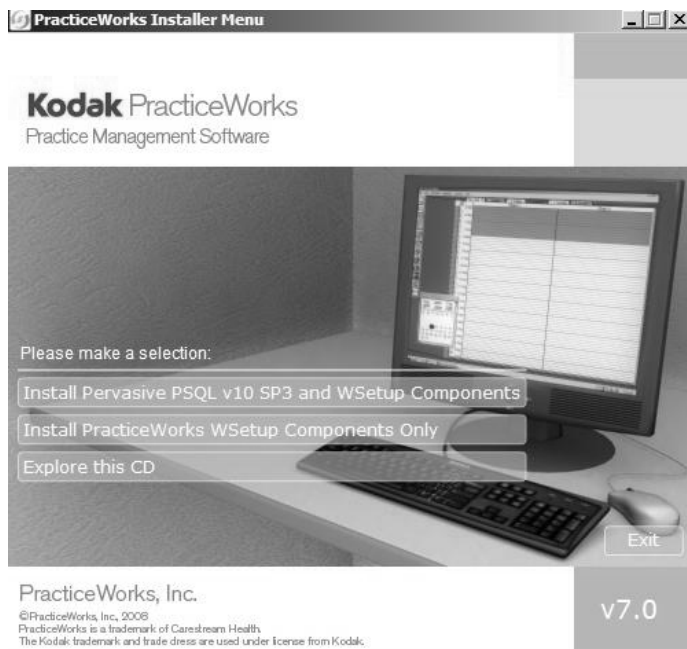
Before installing the Pervasive PSQL data management software, note the following:

- If this is a new installation of the PracticeWorks software, 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 Software](#)” on page 13.
- If you are upgrading your software and do not have a version of Pervasive software installed that is compatible with your operating system, see “[Installing the Pervasive PSQL Server for Windows Software](#)” on page 4. The Microsoft Vista operating system requires Pervasive v9.5 or newer. The Microsoft Windows 7 operating system requires Pervasive v10 SP3 or newer.
- If you are unsure if your database software is compatible with PracticeWorks software, version 7.0, or whether to install the latest version of Pervasive PSQL, see the KODAK PRACTICEWORKS Software System Requirements, Version 7.0 document.

## Installing the Pervasive PSQL Server for Windows Software

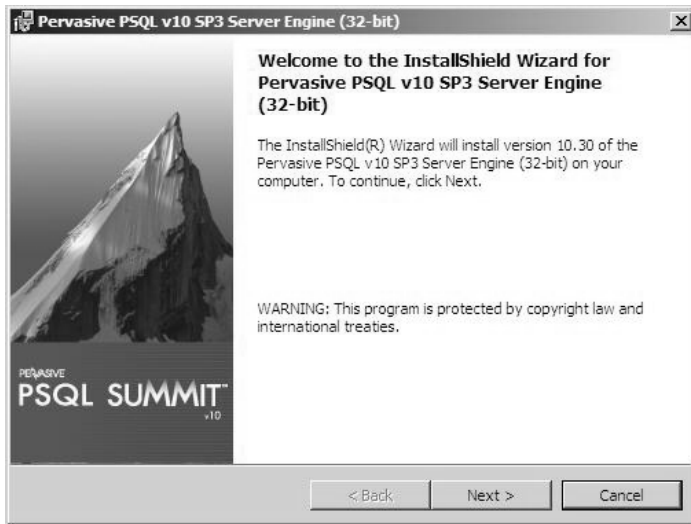
Install this database before installing the PracticeWorks software. To install the database on your server, follow these steps:

- 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.



**Figure 2 PracticeWorks Installer Menu Window**

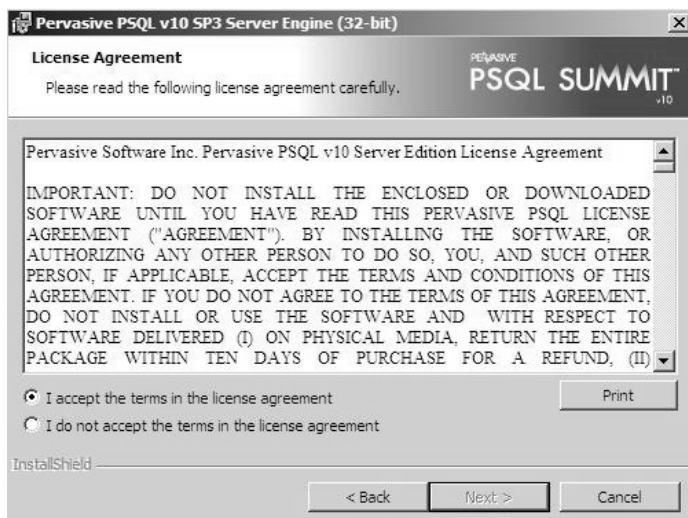
- 2 Select **Install Pervasive PSQL v10 SP3 and WSetup Components**. The **Welcome to the InstallShield Wizard for Pervasive PSQL v10 SP3 Server Engine (32-bit)** window is displayed.



**Figure 3 Welcome to the InstallShield Wizard for Pervasive PSQL v10 SP3 Server Engine (32-bit) Window**

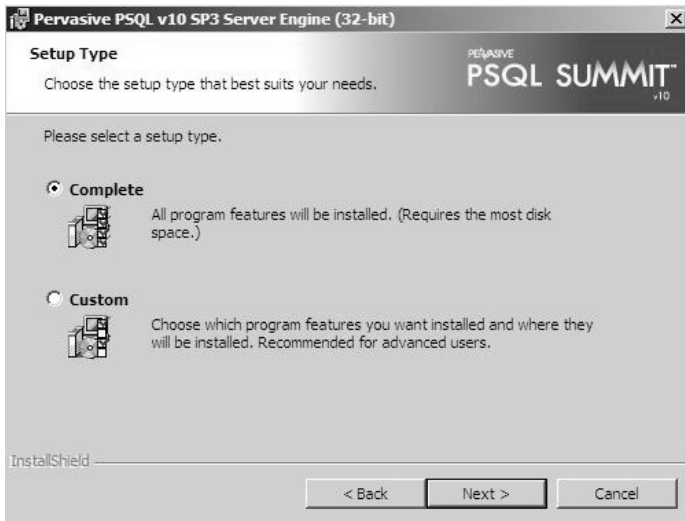
If this window is not displayed, begin the installation by selecting **Start > Run** from the Microsoft Windows software taskbar and typing **D:\Setup.exe**. If your CD-ROM drive is assigned a different letter, substitute that letter for **D**.

- 3 Read the welcome message and click **Next**. The **License Agreement** window is displayed.



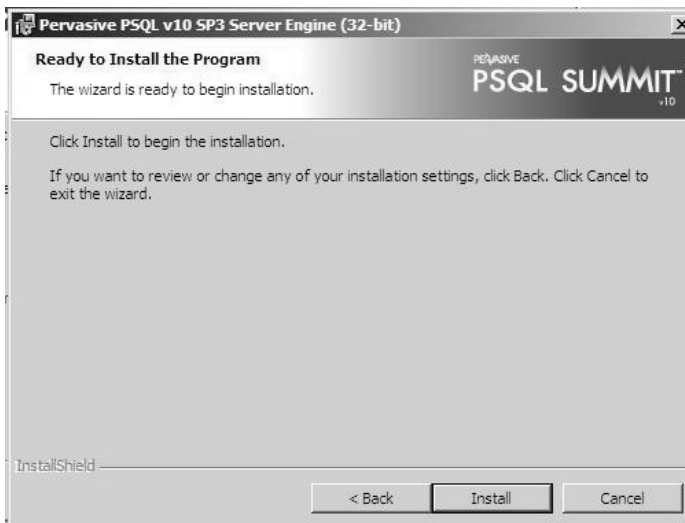
**Figure 4 License Agreement Window**

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



**Figure 5 Setup Type Window**

- 5 To install all program features, select **Complete** and click **Next**. The **Ready to Install the Program** window is displayed.

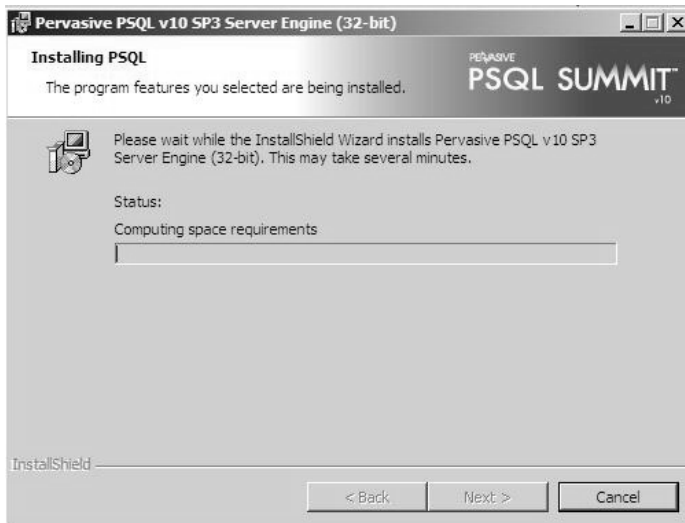


**Figure 6 Ready to Install the Program Window**



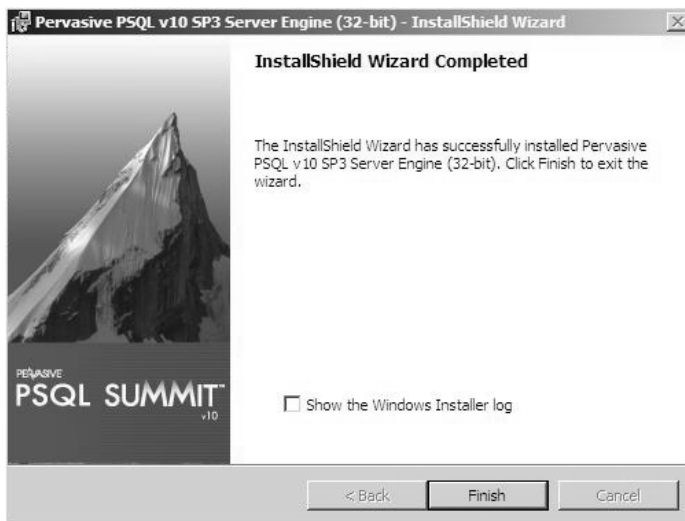
**Note:** If a version of this software is detected by the installer, a message is displayed to inform you that the existing software is being upgraded to this version.

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



**Figure 7 Installing PSQL Window**

After the installation is complete, the **InstallShield Wizard Completed** window is displayed.



**Figure 8 InstallShield Wizard Completed Window**

- Click **Finish**. The **Pervasive PSQL v10 SP3 Installation Utility** window is displayed, followed by a message when the installation is complete.
- Click **OK**. You are prompted to restart your computer.
- Click **OK**.

## Installing the PRACTICEWORKS Software 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:

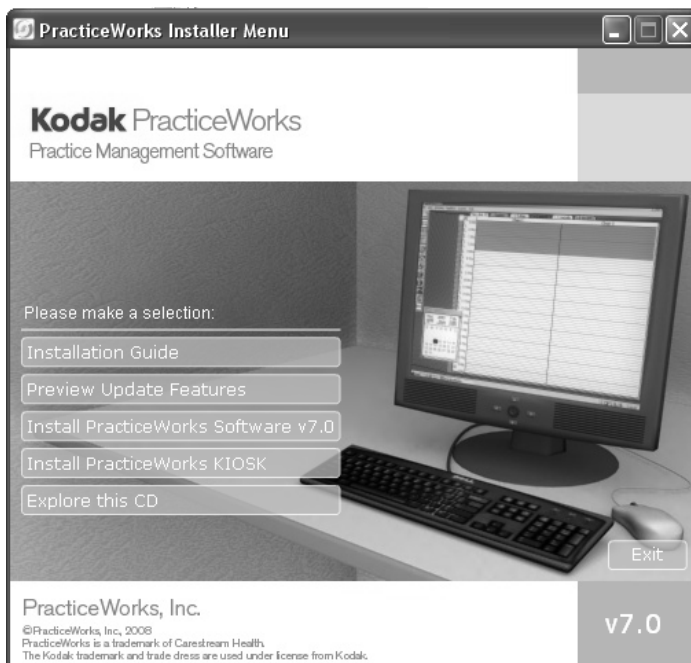
- If there is an existing copy of the software on your server, see [“Performing an Upgrade of PRACTICEWORKS Software”](#) on page 13.
- Ensure that Pervasive PSQL software is installed on the server before proceeding. To install the software, see [“Installing the Pervasive PSQL Software on Your Server”](#) on page 4.



**Important:** If you are using the Microsoft Windows 2000 or Windows XP operating systems, 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 software CD in the CD-ROM drive of the server. The **PracticeWorks Installer Menu** window is displayed.



**Figure 9 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 Software v7.0**. The **Setup** window is displayed.

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



**Figure 10 Welcome Window—Server Setup Program**

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



**Figure 11 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**.

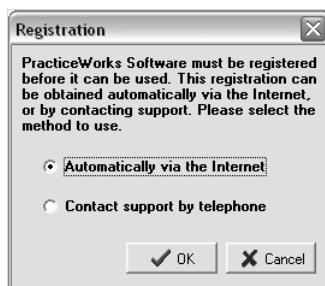
The **KODAK PRACTICEWORKS Practice Management Software Data Installation** window is displayed as the data files are installed, followed by the **KODAK PRACTICEWORKS Practice Management Software Workstation Installation** window.

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

- 6 Click **OK**. When your computer restarts, the **PRACTICEWORKS Software** icon is displayed on your desktop.
- 7 Open the software in one of the following ways:
  - Double-click the **PRACTICEWORKS Software** icon.
  - Select **Start > Programs > PracticeWorks Software > PracticeWorks Software**.

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 12 Registration Window**

- 10 Select your registration preference:
  - To receive your registration code over the Internet, click **Register electronically 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 representative.



**Figure 13 Registration - New Window**

- 11 After the representative gives you the registration code, type it in the **Registration Code** field and click **OK**.

## Installing the PRACTICEWORKS Software 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 software 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 the PracticeWorks software on a workstation, note the following:

- If this is a new installation of the PracticeWorks software, see [“Installing the PRACTICEWORKS Software on Client Workstation”](#) on this page.
- If an older version of the software exists on a workstation, see [“Updating the PRACTICEWORKS Software on a Workstation”](#) on page 18.

## Installing the PRACTICEWORKS Software on Client Workstation



**Important:** If you are using the Microsoft Windows 2000 or Windows XP operating systems, you must be logged in as a user with administrative rights before performing the data installation.

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



**Important:** If you are using the Microsoft Vista operating system, you must install the Pervasive.SQL software, version 9.5 or newer. If you are using the Microsoft Windows 7 operating system, you must install the Pervasive PSQL software, v10 SP3 or newer.

To install the PracticeWorks software 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 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 the PracticeWorks software, 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 Workgroup Setup completed successfully.

- 7 Click **OK**. The **Welcome** window for the PracticeWorks software workstation installation is displayed.



**Figure 14 Welcome Window—Software Setup Program**

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



**Figure 15 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**.

- 9 Review the information and click **Next**. The **KODAK 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.



**Figure 16 Setup Complete Window**

- 10 Click **Finish**. A message is displayed prompting you to restart your computer.
- 11 Click **OK**. When your computer restarts, the **PRACTICEWORKS Software** icon is displayed on your desktop.
- 12 Double-click the icon to access the software.

## Performing an Upgrade of PRACTICEWORKS Software

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 the PracticeWorks software 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:

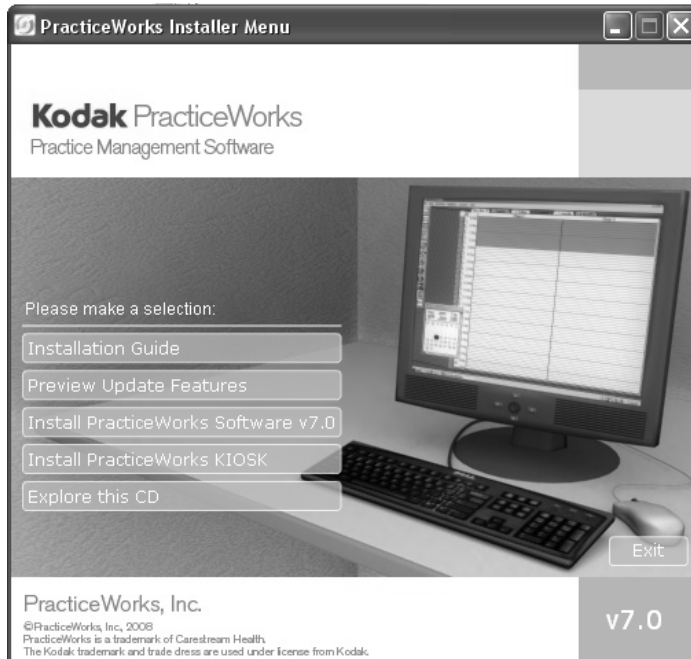
- If you are performing a first-time PracticeWorks software installation on the server, see [“Performing a New PRACTICEWORKS Software Installation on Your Server” on page 3](#).
- Ensure that a compatible version of Pervasive PSQL software is installed on the server. If you are unsure if your software is compatible with PracticeWorks software, version 7.0, see the KODAK PRACTICEWORKS Software System Requirements, Version 7.0 document.
- Ensure that you have a valid backup or copy of the entire directory where the PracticeWorks software program files, subdirectories, and audit trail files are stored.

## Updating the PRACTICEWORKS Software on Your Server

Perform this procedure if you are updating from the PracticeWorks software, version 5.0 or 6.0, to the PracticeWorks software, version 7.0. 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 software CD in the CD-ROM drive of the server. The **PracticeWorks Installer Menu** window is displayed.

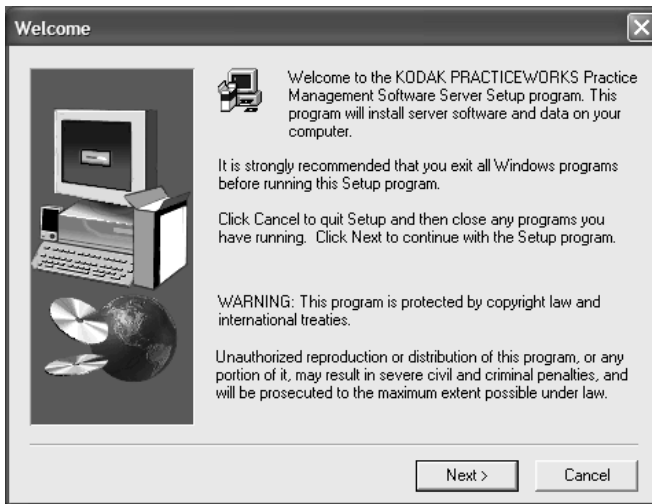


**Figure 17 PracticeWorks Installer Menu Window**

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**.

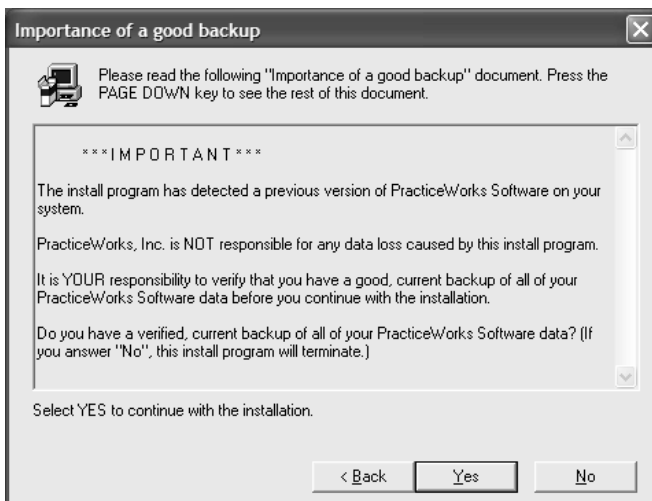
- 2 Select **Install PracticeWorks Software v7.0**. The **Setup** window is temporarily displayed.

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



**Figure 18 Welcome Window**

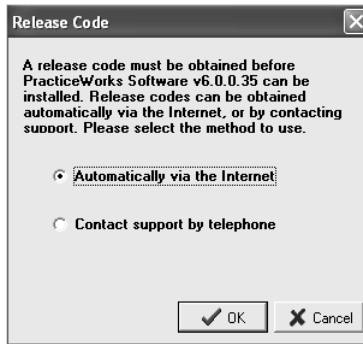
- 4 Read the welcome message and click **Next**. The **Importance of a good backup** window is displayed.



**Figure 19 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 20 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.



**Figure 21 Release Code Window**

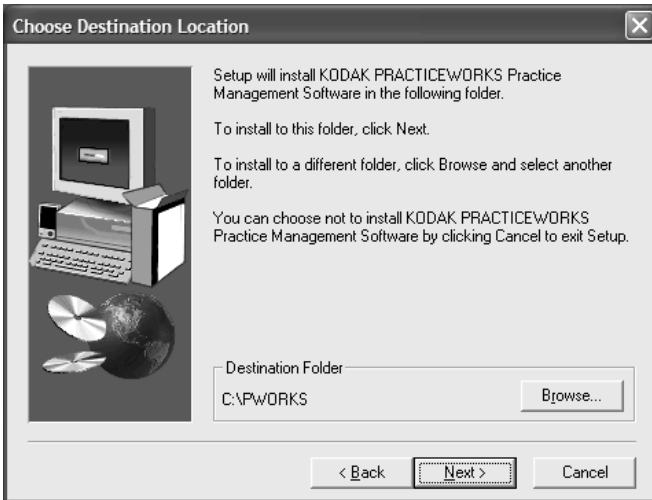
- To receive your release code via the telephone, select **Contact support by telephone**, click **OK**, and call Customer Support. The **Release Code** window is displayed. Read the values in the **Product**, **Customer ID**, and **Hardware ID** fields to the representative. After the representative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

The **Welcome Window** is displayed.



**Figure 22 Welcome Window—Software Setup Program**

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



**Figure 23 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 **KODAK 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.



**Figure 24 Setup Complete Window**

- 9 Click **Finish**. When your computer restarts, the **PRACTICEWORKS Software** icon is displayed on your desktop.

## Updating the PRACTICEWORKS Software 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 the PracticeWorks software, version 7.0, follow these steps:

- 1 Ensure the PracticeWorks software, version 7.0, is installed on the server.
- 2 Open the PracticeWorks software, 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 Software > PracticeWorks Software**.

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 **KODAK PRACTICEWORKS Practice Management Software Workstation Installation** window is displayed.



**Note:** If you have upgraded the version of Pervasive SQL 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 **KODAK 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 Software** 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 KODAK PRACTICEWORKS Voice Activation Module

The Kodak PracticeWorks voice activation module enables you to use voice commands to control some aspects of the Kodak 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:

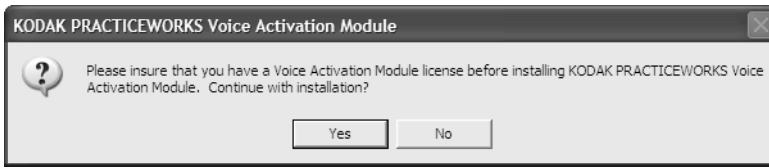
- 1 From the software, select **Help > About PRACTICEWORKS Software**. The **About** window is displayed.
- 2 Click **Show License Details**. The **License Details** window is displayed. If the license is enabled, **Yes** is displayed next to **KODAK PracticeWorks Voice Activation Module**. If the license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

When you install the PracticeWorks software 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 the PracticeWorks software, version 7.0, 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 **PracticeWorks Installer Menu** window is displayed.
- 3 Select **Voice Activation Module**. The **Setup** window is temporarily displayed.

- 4 Wait for the window to close. The **KODAK PRACTICEWORKS Voice Activation Module** window is displayed. A message informs you that you must have a voice activation module license to use the module.

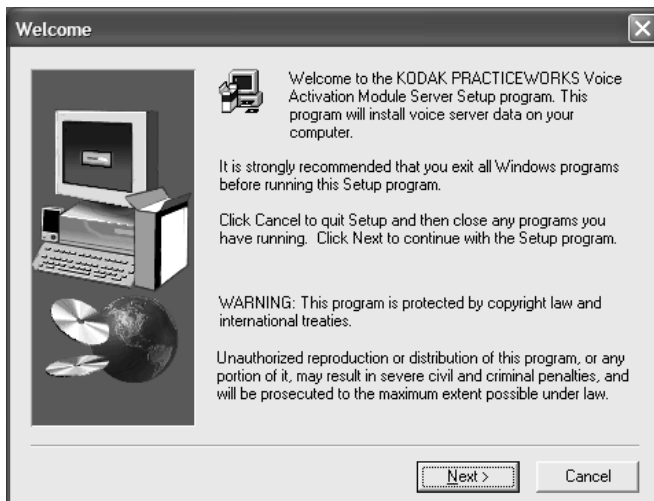


**Figure 25 KODAK PRACTICEWORKS Voice Activation Module Window**



**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.

- 5 If you have the appropriate license, click **Yes**. The **Welcome** window is displayed.



**Figure 26 Welcome Window**

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



**Figure 27 Setup Complete Window**

- 7 Click **Finish**. The **PracticeWorks Installer Menu** window is displayed.

## Installing the PRACTICEWORKS KIOSK Check-In Module on a Workstation

A KIOSK workstation must be activated and configured from the PracticeWorks software on 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 software 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 Software

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

Before installing the M2SYS Fingerprint software, 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 the PracticeWorks software, version 7.0.5 or newer, the installation options for the M2SYS Fingerprint software are added to the **PracticeWorks Software** menu.

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

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