

OR200-10

# **KODAK ORTHOTRAC Practice Management Software**

## **Installation Guide**

# Notice

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# Installing KODAK ORTHOTRAC Practice Management Software

This guide describes the process for installing Kodak OrthoTrac practice management software and for upgrading existing versions of the OrthoTrac software to version 11.1.0. Read this entire document carefully before installing the new software.

This guide includes the following topics:

- [Accessing This Guide Electronically on page 1](#)
- [Getting Started on page 2](#)
- [Previewing the New Features on page 2](#)
- [Installing the ORTHOTRAC Software on page 3](#)
- [Upgrading from the WINDOWS 2000 Operating System on page 3](#)
- [Upgrading the ORTHOTRAC Software on page 12](#)
- [Downloading Software Updates on page 20](#)

## Accessing This Guide Electronically

When you install the OrthoTrac software, electronic versions of this guide and other related documentation are installed on your computer.

To access the electronic documents, follow these steps:



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

- 1 On the taskbar of the Microsoft Windows operating system, click **Start**.
- 2 Select **Programs > OrthoTrac 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 Adobe Reader software is not installed on your computer, follow these steps:

- 1 On the taskbar of the Microsoft Windows operating system, click **Start**.
- 2 Select **Programs > OrthoTrac Software > Online Documentation > Install Adobe Acrobat Reader**.
- 3 Follow the onscreen instructions to install the software.

## Getting Started

Before installing the OrthoTrac 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.

### Mapping a Network Drive

Share the server's hard drive and map a drive on each workstation running the software to the **C** drive on the server. Select **U** as the drive letter for the connection. For information about sharing and mapping drives and folders, see the documentation and online help provided with your Microsoft Windows operating system.

### Backing Up Data

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

## Previewing the New Features

If you want to preview the new and enhanced features in this version of the OrthoTrac software, you can watch a video from the software CD. The preview video contains a brief overview of the new features. To hear the audio portion of the video, your computer must have a sound card and headphones or speakers.

To run the Release Overview video, follow these steps:

- 1 Verify that all other programs on the server are closed, and insert the OrthoTrac software CD in the CD-ROM drive of the server. The **OrthoTrac Software v11.1.0 Install Menu** window is displayed.

If this window is not displayed, begin the installation by selecting **Start > Run** from the Windows operating system taskbar and typing **D:\OrthoTracInstMenu.exe**, if **D** is the letter assigned to your CD-ROM drive. 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**.

## Installing the ORTHOTRAC Software

To install the OrthoTrac software for the first time, follow these procedures:

- [Installing the ORTHOTRAC Software on a Server on page 3](#)
- [Installing the ORTHOTRAC Software on a Workstation on page 7](#)
- [Registering a New Software Installation on page 11](#)



**Note:** If the OrthoTrac server is running on Windows Server 2003 or Windows XP Professional, log in as a user with full administrator rights.

## Upgrading from the WINDOWS 2000 Operating System

Starting with version 11.1.0 of the OrthoTrac software, the Windows 2000 operating system is no longer supported.



**Important:** To run version 11.1.0 and later versions of the OrthoTrac software, you must use a supported Windows operating system. See the system requirements for a list of supported products.

## Installing the ORTHOTRAC Software on a Server

To install the OrthoTrac software on a server, follow these steps:



**CAUTION:** Before performing a server installation on a computer with the Vista operating system, contact technical support for assistance.



**Important:** If the workstation is running on Windows XP Professional, update the operating system to Service Pack 3 before installing the OrthoTrac software.

- 1 Shut down all workstations in your network.
- 2 Restart the server.

- 3 Verify that the server's root hard drive is shared with full access rights. See the documentation and online Help provided with your Windows operating system for more information on sharing.



**Important:** If your computer uses a firewall other than Windows Firewall, you must manually add SQL Services to the firewall exception list before installing the software.

- 4 Insert the OrthoTrac software CD in the CD-ROM drive on the server. The **OrthoTrac Software v11.1.0 Install Menu** window is displayed.



**Figure 1 OrthoTrac Software v11.1.0 Install Menu**

If this window is not displayed, select **Start > Run** from the taskbar of the Windows operating system and type **D:\OrthoTracInstMenu.exe**, if **D** is the letter assigned to your CD-ROM drive. If your CD-ROM drive is represented by a different letter, substitute that letter for **D**.



**Tip:** If you do not have a CD-ROM drive on this computer, you can share the drive from another computer.

- 5 Verify that all programs are closed and click **Install OrthoTrac v11.1.0**. The **Welcome** window is displayed.



**Figure 2 Welcome Window**

- 6 Review the information, and click **Next**. On computers that are running the Windows 2000 operating system, the **Windows OS Warning** window is displayed.



**Figure 3 Windows OS Warning Window**

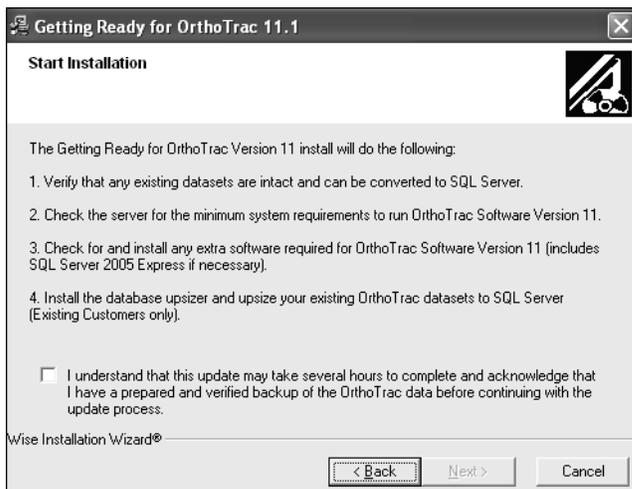
For computers that are running supported operating systems, the **Installation Type** window is displayed, asking if this computer is a server or a workstation.

- 7 Select **This Machine is the Server**, and click **Next**. The **Getting Ready for OrthoTrac 11.1.0** window is displayed.



**Note:** Confirm that all computers in your practice meet the minimum system requirements before selecting this checkbox.

- 8 Review the information, and click **Next**. The **Getting Ready for Orthotrac 11.1 - Start Installation** window is displayed.



**Figure 4 Getting Ready for Orthotrac 11.1 - Start Installation**

- 9 Review the information, and click **Next**. The **Components to be Installed** window is displayed.
- 10 Click **Next**. The OrthoTrac software components are installed on the server.
- 11 When the component installation is complete, the **Choose Destination Folder** window is displayed. The destination folder defaults to **C:\OMS**, and this folder should not be changed. Click **Next**. The **Start Installation** window is displayed.
- 12 Click **Next**. The installation begins.
- 13 When the installation is finished, the **Installation Complete** window is displayed. Click **Finish**.
- 14 Click **Exit**.

## Installing the ORTHOTRAC Software on a Workstation

To install the software on a machine that is using the Microsoft Windows Vista operating system, see “Installing the ORTHOTRAC Software on Workstations Using the WINDOWS VISTA Operating System” .



**CAUTION:** Before performing a server installation on a computer with the Vista operating system, contact technical support for assistance.

To install the software on a machine that is using another Microsoft Windows operating system, see “Installing the ORTHOTRAC Software on Workstations Using a Supported WINDOWS Operating System” .

### Installing the ORTHOTRAC Software on Workstations Using the WINDOWS VISTA Operating System

To install the OrthoTrac software on a workstation running the Windows Vista operating system, follow these steps:



**Important:** If you use Microsoft Word software at a workstation, ensure that the software is installed before installing the OrthoTrac software.

- 1 Verify that the server is running, and start the workstation.
- 2 Map a drive from the workstation to the **C** drive on the server. Select **U** as the drive letter for the connection. See the documentation and online Help provided with your Windows operating system for more information on mapping a network drive.
- 3 Insert the OrthoTrac software CD in the CD-ROM drive on the workstation. The **Autoplay** window is displayed. The **OrthoTrac Software v11.1.0 Install Menu** window is displayed.



**Important:** Log in as a user with full administrator rights.

If the **OrthoTrac Software v11.1.0 Install Menu** does not automatically open, select **Start > Run** from the taskbar of the Windows operating system and type **D:\OrthoTracInstMenu.exe**, if **D** is the letter assigned to your CD-ROM drive. If your CD-ROM drive is represented by a different letter, substitute that letter for **D**.

- 4 Verify that all programs are closed and click **Install OrthoTrac v11.1.0**. The **User Account Control** window is displayed.
- 5 Click **Allow**. The **Welcome** window is displayed.

- 6 Click **Next**. The **Installation Mode** window is displayed, asking if this computer is a server or a workstation.
- 7 Verify **This Machine is a Workstation** is selected and click **Next**. The **Choose Destination Folder** window is displayed. The destination folder defaults to **C:\OMS**, and this folder should not be changed.



**Note:** Confirm that all computers in your practice meet the minimum system requirements before selecting this checkbox.

- 8 Click **Next**. The **Start Installation** window is displayed.
- 9 Click **Next**. After the setup program copies the OrthoTrac software to your computer, the **Installation Complete** window is displayed.



**Important:** Install the OrthoTrac software on all workstations before accessing the software.

- 10 Click **Finish**. A message is displayed, prompting you to restart your computer.
- 11 Click **OK** to restart your computer. The **OrthoTrac Software** icon is displayed on the desktop of your Windows Vista operating system, confirming that the OrthoTrac software has been installed.
- 12 Repeat the above steps to configure and install the OrthoTrac software on each computer in your network that will be running the Windows Vista operating system.

## Installing the ORTHOTRAC Software on Workstations Using a Supported WINDOWS Operating System



**Important:** If you use Microsoft Word software at a workstation, install that software before you install the OrthoTrac software.



**Important:** If the workstation is running on Windows XP Professional, log in as a user with full administrator rights.



**Important:** If the workstation is running on Windows XP Professional, update the operating system to Service Pack 3 before installing the OrthoTrac software.

To install the OrthoTrac software on a workstation running a supported Windows operating system, follow these steps:

- 1 Verify that the server is running and start the workstation.
- 2 If you use a terminal server configuration and you are installing OrthoTrac software on the terminal server, follow the steps described in this section to install the software on the terminal server console. The software cannot be installed from within a client session.
- 3 Map a drive from the workstation to the **C** drive on the server. Select **U** as the drive letter for the connection. See the documentation and online Help provided with your Windows operating system for more information on mapping a network drive.
- 4 Insert the OrthoTrac software CD in the CD-ROM drive on the workstation. The **OrthoTrac Software v11.1.0 Install Menu** window is displayed.

If the **OrthoTrac Software v11.1.0 Install Menu** does not automatically open, select **Start > Run** from the taskbar of the Windows operating system and type **D:\OrthoTracInstMenu.exe**, if **D** is the letter assigned to your CD-ROM drive. If your CD-ROM drive is represented by a different letter, substitute that letter for **D**.

- 5 Verify that all programs are closed and click **Install OrthoTrac v11.1.0**. The **Welcome** window is displayed.



**Note:** Confirm that all computers in your practice meet the minimum system requirements before selecting this checkbox.

- 6 Click **Next**. On computers that are running the Windows 2000 operating system, the **Windows OS Warning** window is displayed.



**Figure 5 Windows OS Warning Window**

For computers that are running supported operating systems, the **Choose Destination Folder** window is displayed. The destination folder defaults to **C:\OMS**, and this folder should not be changed.



**CAUTION:** Ensure that no important data exists in this folder before proceeding. Click **OK** to return to the installation wizard.

If the folder **C:\OMS** already exists on this computer, a message is displayed, warning that continuing with the installation will delete this folder and all its contents. This window is not displayed during installation on the terminal server.

- 7 Click **Next**. The **Start Installation** window is displayed.
- 8 Click **Next**. After the setup program copies the OrthoTrac software to your computer, the **Installation Complete** window is displayed, confirming that the OrthoTrac software is successfully installed.
- 9 Click **Finish**. A message is displayed, prompting you to restart your computer.
- 10 Click **OK** to restart your computer. The **OrthoTrac Software** icon is displayed on the desktop of your Windows operating system.



**Important:** Install the OrthoTrac software on all workstations before accessing the software.

- 11 Repeat the above steps to configure and install the OrthoTrac software on each computer in your network.

## Registering a New Software Installation

After completing the installation process, you will need to license the software before you can use it to manage your office.



**Important:** Register the software on the image server before installing the software on a workstation.

To register a new software installation, follow these steps:

- 1 Select **Start > Programs > OrthoTrac Software**. The **Install License File** window is displayed, prompting you to insert your license CD.
- 2 Insert the license file in the drive on the server, and click **OK**. After the license file is installed, the **Registration Reminder** window is displayed.
- 3 Select **Yes, I want to register now** and click **OK**. The **Registration – New** window is displayed.



**Figure 6** Registration—New Window

- 4 Select one of the following:
  - To register via the Internet, select **Automatically via the Internet** and click **OK**.
  - To register by telephone, select **Contact support by telephone** and click **OK**. Contact your support representative, type your registration code in the **Registration Code** field, and click **OK**.



**Note:** Use capital letters when typing the registration code.

The **Installation Complete** window is displayed, confirming that the OrthoTrac software is successfully installed.

- 5 Eject the license file, and click **Finish**. The **OrthoTrac Software** is displayed.

## Upgrading the ORTHOTRAC Software



**Important:** Your practice must use version 10.0 or higher before upgrading to version 11.1.0 of the software.

If your practice uses a terminal server configuration, you must upgrade the OrthoTrac software on each main office workstation and on the terminal server. Do not attempt to upgrade the OrthoTrac software on any computers that access OrthoTrac software exclusively through terminal services client software.



**Important:** If you use Microsoft Word software at a workstation, ensure that the software is installed before installing the OrthoTrac software.

To upgrade the OrthoTrac software, follow these procedures:

- [Upgrading from Version 10.0 to 11.1.0 on a Server on page 12](#)
- [Upgrading from Version 11.0 to 11.1.0 or Higher on a Server on page 16](#)
- [Activating Finger Print Services on page 18](#)
- [Upgrading the ORTHOTRAC Software on Workstations on page 19](#)

### Upgrading from Version 10.0 to 11.1.0 on a Server



**CAUTION:** Before performing a server installation on a computer with the Vista operating system, contact technical support for assistance.

To upgrade the OrthoTrac software from version 10.0 to version 11.1.0 on a server, follow these steps:

- 1 Shut down all workstations in your network, and alert all users to refrain from using OrthoTrac software until the installation is complete.
- 2 Restart the server.



**Important:** If the OrthoTrac server is running Windows Server 2003 or Windows XP Professional, log in as a user with full administrator rights.

- 3 Insert the OrthoTrac software CD in the CD-ROM drive on the server. The **OrthoTrac Software v11.1.0 Install Menu** window is displayed.



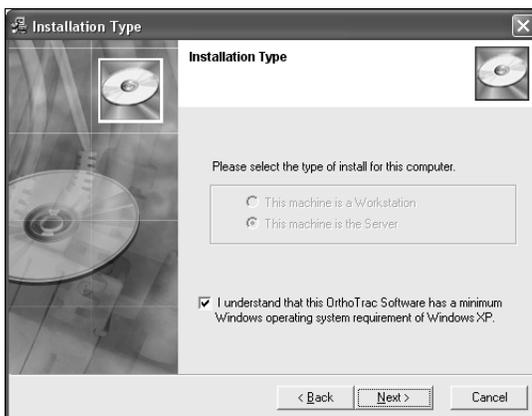
**Figure 7 OrthoTrac Software v11.1.0 Install Menu**



**Important:** If your computer uses a firewall other than Windows Firewall, you must manually add SQL Services to the firewall exception list before installing the software.

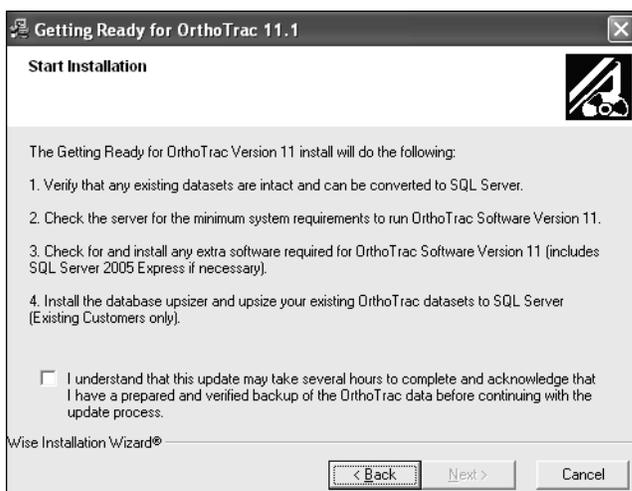
If this window is not displayed, select **Start > Run** from the taskbar of the Windows operating system and type **D:\OrthoTracInstMenu.exe**, if **D** is the letter assigned to your CD-ROM drive. If your CD-ROM drive is represented by a different letter, substitute that letter for **D**.

- 4 Verify that all programs are closed and click **Install OrthoTrac v11.1.0**. The **Installation Type** window is displayed.



**Figure 8 Installation Type Window**

- 5 Click **Next**. The **Getting Ready for Orthotrac 11.1.0 - Start Installation** window is displayed.



**Figure 9 Getting Ready for Orthotrac 11.1.0 - Start Installation Window.**

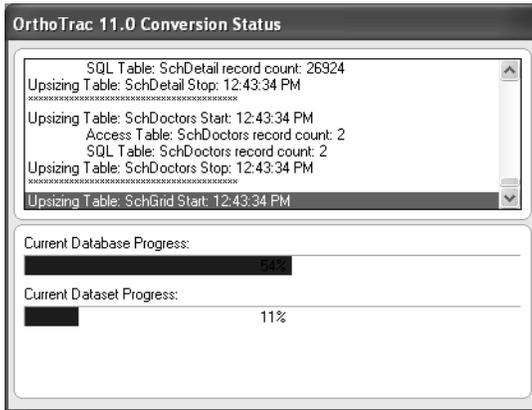
- 6 Review the information, select **I understand that this update may take several hours to complete and acknowledge that I have a prepared and verified backup of the OrthoTrac data before continuing with the update process**, and click **Next**. The **Components to be Installed** window is displayed.



**Note:** Confirm that all computers in your practice meet the minimum system requirements before selecting this option.

- 7 Click **Next**. The **Installing Prerequisites** window is displayed.
- 8 When configuration is complete, click **Finish**. The **Install** window is displayed.
- 9 Click **OK** to restart the computer.

- 10 After the computer restarts, the **OrthoTrac 11.1.0 Conversion Status** window is displayed, and the data conversion process begins.



**Figure 10 OrthoTrac 11.0 Conversion Status Window**

The **Choose Destination Location** window is displayed. Typically, the destination location defaults to the folder containing your OrthoTrac software, and this location should not be changed. Click **Next**. The **Start Update** window is displayed.

- 11 Click **Next**. The setup program copies the OrthoTrac software to your computer. The **Release Code** window is displayed.
- If your computer has Internet access, select **Automatically via the Internet** and click **OK**.
  - If your computer does not have Internet access, select **Contact support by telephone** and click **OK**. Contact your support representative, type your release code in the **Release Code** field, and click **OK**.
- 12 The **OrthoTrac Software Update** window is displayed, asking if you want to create a backup of your database. Click **Yes**.
- 13 The installation is completed, and a message is displayed, prompting you to restart your computer. Click **OK**.



**Note:** If you are upgrading to version 11.0.2 or higher and use T.Link, you will be prompted to contact TeleVox to ensure that you have the latest version of the T.Link software installed for proper compatibility with the OrthoTrac software.

## Upgrading from Version 11.0 to 11.1.0 or Higher on a Server



**CAUTION:** Before performing a server installation on a computer with the Vista operating system, contact technical support for assistance.

To upgrade the OrthoTrac software from version 11.0 to version 11.1.0 or higher on a server, follow these steps:

- 1 Shut down all workstations in your network, and alert all users to refrain from using OrthoTrac software until the installation is complete.
- 2 Restart the server.



**Important:** If the OrthoTrac server is running Windows Server 2003 or Windows XP Professional, log in as a user with full administrator rights.

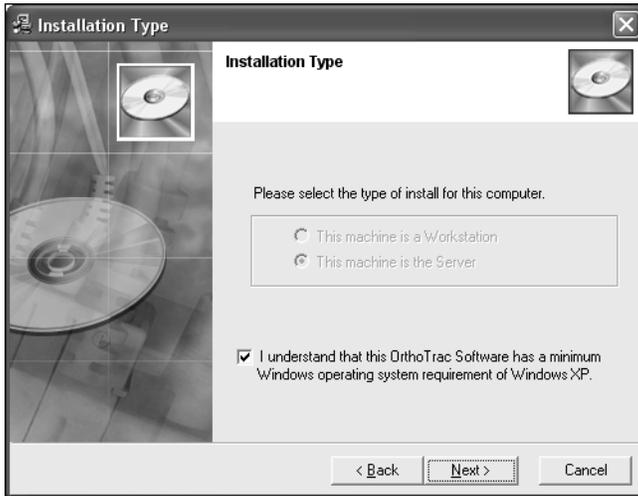
- 3 Insert the OrthoTrac software CD in the CD-ROM drive on the server. The **OrthoTrac Software v11.1.0 Install Menu** window is displayed.



**Figure 11 OrthoTrac Software v11.1.0 Install Menu**

If this window is not displayed, select **Start > Run** from the taskbar of the Windows operating system and type **D:\OrthoTracInstMenu.exe**, if **D** is the letter assigned to your CD-ROM drive. If your CD-ROM drive is represented by a different letter, substitute that letter for **D**.

- Verify that all programs are closed and click **Install OrthoTrac v11.1.0**. The **Installation Type** window is displayed.



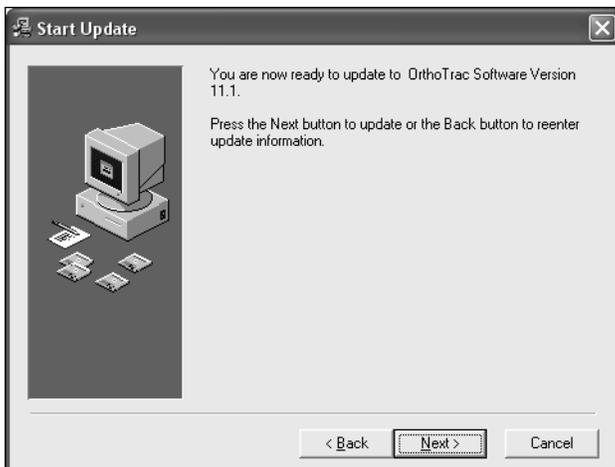
**Figure 12 Installation Type Window**

- Click **Next**. The **Choose Destination Location** window is displayed. Typically, the destination location defaults to the folder containing your OrthoTrac software, and this location should not be changed.



**Note:** Confirm that all computers in your practice meet the minimum system requirements before selecting this checkbox.

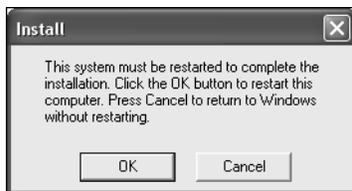
- Click **Next**. The **Start Update** window is displayed.



**Figure 13 Start Update Window**

- Click **Next**. The setup program copies the OrthoTrac software to your computer.

- 8 The **OrthoTrac Software Update** window is displayed, asking if you want to create a backup of your database. Click **Yes**.
- 9 The installation is completed, and a message is displayed, prompting you to restart your computer.



**Figure 14 Install Window**

- 10 Click **OK**.

## Activating Finger Print Services

If your practice uses the finger print scanner, you are prompted to activate the finger print services after you install version 11.0.2 and restart the software.



**Note:** The activation prompt is not displayed for versions 11.0.3 or higher of the OrthoTrac software.

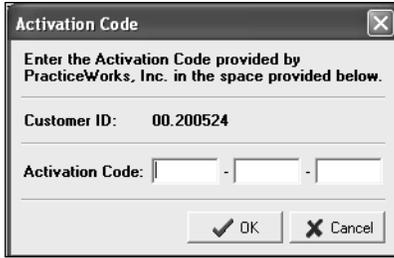
To activate finger print services, follow these steps:

- 1 Open the OrthoTrac software. The **OrthoTrac Finger Print** window is displayed.



**Figure 15 OrthoTrac Finger Print Window**

- 2 Click **Yes**. The **Activation Code** window is displayed.



**Figure 16 Activation Code Window**

- 3 Type the activation code given to you by your software support representative and click **OK**.

## Upgrading the ORTHOTRAC Software on Workstations



**Important:** If the workstation is running on Windows XP Professional, log in as a user with full administrator rights.

To upgrade the OrthoTrac software on a workstation, follow these steps:

- 1 Verify that the server is running.

If you use a terminal server configuration and you are updating the terminal server, perform these steps from the terminal server console rather than from within a client session.

- 2 Start the workstation.



**Important:** Alert all users to refrain from using OrthoTrac software until the installation is complete on every computer in your network.

- 3 Open the OrthoTrac software. A message is displayed, alerting you that a new version exists on the server and asking if you want to install it.
- 4 Click **Yes**. OrthoTrac software, version 11.1.0, is installed on the workstation.

After the installation is complete, you might be prompted to restart your computer. Click **OK** to restart. If you are not prompted to restart your computer, the OrthoTrac software opens automatically.



**Important:** Install the OrthoTrac software on all workstations before accessing the software.

- 5 Repeat the above steps to upgrade the OrthoTrac software on each computer in your network.

## Downloading Software Updates



**Important:** Version 11.1.0 of the software is not available for download. Install this version from CD.

You can check for and download updates to your software using the Internet. To check for updates, follow these steps:

- 1 On a computer with an active Internet connection, open your practice management software.
- 2 Select **Help > Check for Updates**. A message is displayed, alerting you that the software is checking for updates.



**Note:** You must have the appropriate security permissions to download software updates.

- 3 If an update is available, a message is displayed, prompting you to download the update.



**Note:** If no updates are currently available, a message is displayed. Click **Exit**.

- 4 Click **Download**. The software downloads the update to your computer. When the download is complete, a message is displayed, confirming that the download was successful.
- 5 Click **Exit**.
- 6 Restart your software. The software automatically detects and installs the update.