OrthoTrac™ Practice Management Technician's Installation Packet

Carestream®

866-722-2567 - 1765 The Exchange - Atlanta, Georgia 30339

Tech Pack

Email:
Title:
Code:

Contents

Email:
Title:
Code:

Tech Pack

Email:
Title:
Code:

OrthoTrac Technician's Installation Packet Acknowledgement

This Technician's Installation Packet (Tech Pack) contains information critical for any practice considering purchasing, or has already purchased hardware for their OrthoTrac system.

The Tech Pack outlines the responsibilities of the Local Technician, and how Carestream OrthoTrac Support can assist in maintaining this setup. This document will cover recommended hardware, network, and software configurations. It also contains information on installation and configuration of OrthoTrac software.

Overview

Carestream Dental is only able to test OrthoTrac in a limited number of environments. Our hardware recommendations follow what has been tested. Carestream support will work with you as best as we can if you are not following our recommendations, but we will be limited in modifications we can make to get OrthoTrac working in those environments.

OrthoTrac requires the user to have read, write, and modify permissions to multiple areas including a shared folder on the OrthoTrac server. Please read this entire document and the installation guide prior to setting up your server and workstations.

Unless otherwise noted, this Tech Pack is written purely with Carestream OrthoTrac in mind. Carestream Orthodontic Imaging, and all additional module technical documentation, will not be included in this document unless pertaining directly to integration with OrthoTrac.

The most current version of our System Requirements is available at

http://www.carestreamdental.com/ImagesFileShare/.sitecore.media_library.Files.Support.System_Requirements.Orthotrac_Software_Requirements.pdf

http://www.carestreamdental.com/ImagesFileShare/.sitecore.media_library.Files.Support.System_Requirements.Orthotrac-Cloud-SysReqs.pdf

For questions on versions of Windows, peripherals, third-part software versions, and other software requirements, please reference this document.

For further questions and verification on information presented within this guide, or on any guide, please contact our technical support department at (866) 722-2567. OrthoTrac support is available Monday through Friday 8:00 AM through 8:30 PM Eastern Time.

Installation Notes

This guide is meant as a supplement to the OrthoTrac Installation Guide. The installation guide will contain the most recent step by step instruction. It is located on the install DVD (Documentation\Manuals\OR200_OrthoTrac_InstallationGuide.pdf), or (OMS\OnlineDocs\OR200_OrthoTrac_InstallationGuide.pdf) on an existing server installation.

Basic Installation steps:

1. Install OrthoTrac on the server.
2. Share the parent folder of the installed OMS folder.
3. Install Imaging on the server.
4. Restore any existing data.
5. Map workstations to the shared folder on the server.
6. Install OrthoTrac then Imaging on the workstations.

© 2018 Carestream Dental LLC.

OrthoTrac is a trademark of Carestream Dental Technology Topco Limited. All trademarks and registered trademarks are the property of their respective owners.

Email:
Title:
Code:
Page: 4 of 18

7. Install OrthoTrac then Imaging on any Remote Desktop Services Server.

Office Configurations

There are several ways OrthoTrac can be configured. Generally speaking, an office, regardless of the number of locations, will want to keep all of their locations together in one data set. In cases where the client wishes to house multiple data sets to further separate out their offices, assistance may be required from a Carestream representative for installation and support.

Single Locations

A single office location is typically configured with a server that houses the OrthoTrac data and multiple workstations that run OrthoTrac locally and connect to the OrthoTrac server over the network. The server runs an instance of Microsoft SQL Server, by default OrthoTrac v12 and v14 will install MS SQL 2008 Express. We recommend allowing OrthoTrac to install the Express edition of SQL. If you will require the use of a full version of SQL during the installation process you will be able to choose to direct OrthoTrac to use an existing SQL instance during the server install. The server also houses a number of files that are accessed by the workstation.

If the practice will be using Carestream Orthodontic Imaging, we recommend having a separate server to house the imaging data. This should be a separate physical server. It is preferable to have one server house the data for both programs than to virtualize both the OrthoTrac and Imaging servers and run them on the same host.

> **Note:** SQL Server Express Editions are restrictive on database size and RAM/CPU usage and could affect performance. Please consult Microsoft for SQL Server version specifications to make sure that an Express edition is right for your practice.

Multiple Locations

Clients who have multiple locations and wish to share a single data set between the locations will need use remote access software to connect the locations. We recommend installing the OrthoTrac data server in the largest office along with a Remote Desktop or Citrix server and have remote users connect to the server through Remote Desktop Services to run OrthoTrac. The remote office will not actually run OrthoTrac locally; the application will be run in the main office on the Remote Desktop server. Carestream Dental has not tested running OrthoTrac between two offices using a VPN connection.

Imaging in Multiple Locations

Adding Carestream Imaging with multiple office locations increases the variables and methods of setting up the office. We recommend discussing the options with Support or Implementations prior to setting this up. Some questions to consider before contacting support:

Will images acquired in one office need to be accessible in all offices?

What sort of digital imaging equipment will be used in each office?

What internet connections are available in each office and what is the bandwidth?

Tech Pack

Installation/Migration

Whether a client is a new or an existing customer, before data can be applied for an office, the server that will house the data must have OrthoTrac installed in the proper location. OrthoTrac must be installed before CS Ortho Imaging software is installed. Additionally, this allows the two programs to communicate properly.

It is also recommended to call Support a few days before your planned update/install in order to schedule a representative to work with you during the transition. When migrating data, we also recommend decommissioning the old server if at all possible, or at least, stopping services for the SQL instance running OrthoTrac.

New Server Installation

All workstations must be able to access the parent folder of OMS on the server. If you do not want to share the root of the C:\ drive on your server, please be sure to change the destination folder during the install process. **Do not install to C:\OMS then move folders.** This **will** break the ability for a workstation to create a backup copy of the OrthoTrac data and will cause problems updating the server.

For instance, if a client wishes to install OrthoTrac on D:\data, then you must install OrthoTrac to D:\data\oms and d:\data\oms-spec, sharing the folder d:\data on the network, and map the network drive on the workstation (generally U:\) to this data folder on the server.

Before installing, OrthoTrac will search all local hard drives for an existing installation of OrthoTrac. With a new server install it is recommended that you wait for this process to complete. There is a work around noted in the Update Existing Server section.

If you are using Windows Firewall please be sure it is on when OrthoTrac is installed. There are exceptions that must be made for SQL and they will be made automatically if you are using Windows Firewall. If you are not using Windows Firewall, then you will need to manually add exceptions for SQL to the firewall.

Tech Pack

Migrating an Existing Version 11 or Later Server to a New Server

1. Have everyone log out of OrthoTrac.

2. Start OrthoTrac on the server.

3. Have a staff member log into OrthoTrac.

4. Click on File->Prepare Backup.

5. Wait for the Prepare Backup process to complete.

6. Go to Options -> Environment.

7. Note the Server Path (default is C:\OMS) and Database Prefix (default is Main)

8. Browse to the server path\backup\Most_Recent and verify the backup files exist for each database.

The file name structure is prefix_dbname_yyyymmdd_xxx.bak. The prefix is the Database prefix from environment. There are five databases for OrthoTrac, named Audit, CommCat, DelOMS, OMS, TxCard. The xxx is the backup count, the first backup of the day is 001. Example name – Main_OMS_20130505_001.bak

If the client uses CS Ortho Imaging 10 or later:

Run pwisetloc.exe.

Note the SQL Backup Location.

Browse to the SQL Backup Location

Verify there is a Most_Recent folder that contains a prefix_PWImage_yyyymmdd_xxx.bak file.

9. Close OrthoTrac.

10. Right-click on the key icon in the system tray and choose Exit PracticeWorks Server.

11. Install 11 on the new server.

12. Copy the following files from the old server to the OMS folder on the new server:

\OMS\pwsvr\pwlf.dat

\OMS*.000, C:\OMS*.001, C:\OMS*.002, etc.   (Please note that by default, files with these filename extensions are set to be hidden by Windows. You will need to set Windows to view all files including "hidden" or "system" files in order to see these files)

\OMS\filelist.nrl   (Please note that by default, files with this filename extension are set to be hidden by Windows. You will need to set Windows to view all files including "hidden" or "system" files in order to see this file)

\OMS\Fingerprint.mdb

\OMS\roll*.txt

\OMS\AuditTx.dat

Copy the following folders the old server to the OMS folder on the new server. Not all of the folders may exist on the old server:

\OMS\Backup

\OMS\Daysheet

\OMS\Docs

\OMS\ECS

\OMS\Epayment

\OMS\ICCPS

\OMS\Snapshot

\OMS\ToothCht

\OMS\Orthometrics

If the new server will be the imaging server, copy the following files and folders:

\OMS\image

13. On the new server, run the utility c:\oms-spec\utility\urestore.exe. Agree to the notification page, and click next. Unselect perform backup, and select next. Select the "Most_Recent" folder from the backup folder just copied, and click next. Continue through procedure to restore the most recent copy of the office's data to this new server.

14. Set workstations to look to the new server. Remap the network drive for OrthoTrac to the parent folder of the OMS folder on the server. In c:\windows\OMS.ini, make sure all references to the old server are renamed. In c:\windows\system32\pwclient.exe (syswow64 for 64-bit installations), click options, and make sure the path is to the new server. Run c:\oms\pwisetloc.exe and ensure the proper data locations are selected.

Tech Pack

Migrating an Existing Version 10 to a Version 11 (Or Higher) Server

It is highly recommended that you work with Support before transition. OrthoTrac versions previous to version 10 must be updated incrementally. However, version 10 and later can be directly updated to the most recent version. Version 10 of OrthoTrac and previous releases did not run on modern Windows operating system releases, so Support will have to manually update the datasets on the new server. The steps will be the same as the previous section, however, step 13 will require support assistance to update the MDB files from the old server's OMS folder to version 11 data. Please note, that since the process is a transition between two different data structures, this may take several hours.

New Workstation Installations

Prior to installing OrthoTrac on a workstation, log in as a user with the correct administrative access to the server machine, and confirm that the machine has a logical drive U:\ mapped to the appropriate share containing the OMS and OMS-Spec directories on the server. Do not map the U:\ drive directly into the OMS folder, it will prevent the workstation from updating correctly. If a drive other than U:\ is used then adjustments to the *OMS.ini* file (located in C:\Windows) must be made as by default the workstation installation of OrthoTrac creates an *OMS.ini* file which expects the use of the U:\ drive designation. Please note that the OrthoTrac Support Center expects the mapped drive to be U:\ and using anything other than U:\ could increase the amount of troubleshooting and time spent working on any issues**.**

Note: In all installations, the DataPath=… line in the [Awps] section of the OMS.ini file should always point to the local installation of OrthoTrac. E.g. DataPath=C:\OMS

Installation Across the Network

OrthoTrac can also be installed across the network. The advantage of installing it across the network is that it will automatically set the locations in the OMS.ini.

 This solution assumes that the Server is named Server and you are installing it to a workstation that is already connected to the network with proper permissions to access the server. Also, this assumes that OrthoTrac is installed to the c: local disk drive on the server and that the c: drive on the server is mapped as the U: drive on the workstation. When installing on a system where these assumptions are incorrect changes must be made.

1. Click Start, Run.

2. Type: U:\OMS-SPEC\Workstation Setup

3. Click OK.

4. Double-click wsetup.exe. When the installation is complete the system will prompt for a reboot.

5. After the computer has rebooted, log into OrthoTrac to confirm that the installation was successful.

Tech Pack

New Terminal Server Installation/Citrix Environments

Installation to a Terminal Server and/or Citrix environment is similar to a regular workstation installation. However, the Terminal Server MUST be in install mode, and must be installed from the administrator's console session. Windows install mode can be set simply by using the command **change user /install**, making sure once the installation is complete to return to **change user /execute**. An OMS.ini file will be placed in each user's %userprofile%\windows folder instead of the local C:\Windows folder. Please see the section "Microsoft Word in a Terminal Server/Citrix Environment" for details on setting up the office to print letters in a Terminal Services environment if they are going to print letters from their Terminal Server directly.

Updating

Most updates to OrthoTrac are quite simple. The install media should be inserted in the data server machine, which will take the user through the install process. After the data server is updated, OrthoTrac should be launched on all local workstations, and the console session of the Terminal Server in install mode (when applicable).

Server Updates

Updating the server is generally as simple as inserting the DVD on the server's DVD drive. The update will always begin by searching the local hard drive for installations of OrthoTrac.

If the server has a large hard drive this search can take a while to complete. You can bypass the search for an existing installation by launching the WSetup.exe program with the /PATH=<installdirectory> switch. Please note that the switch is case sensitive and must be all uppercase. Example: D:\>WSetup.exe /PATH=C:\OMS

Workstation Updates

Normally, updating the workstations only requires starting OrthoTrac after the server has been updated. If the installation does not begin upon launching OrthoTrac, it can be executed manually by running the file U:\oms-spec\workstation setup\WSetup.exe .

Upgrading Existing Terminal Servers/Citrix Environments

We recommend disconnecting all users currently logged in to the Terminal Server before the update, since the software will not install properly if users are logged in to OrthoTrac or any portion of the system. Set the console session of the Terminal Server to install mode by typing "**change user /install**" from a command prompt. Once this is done, launch OrthoTrac from the console session, and follow the prompts. If the installation does not begin upon launching OrthoTrac, it can be executed manually by running the file U:\oms-spec\workstation setup\WSetup.exe .

Note that after the update is complete, the terminal server must be set back to execute mode by running "**change user /execute**".

Uninstalling

Note: Please make a backup (see Backing Up the Server) and remove any data BEFORE following these instructions

OrthoTrac does not come with uninstall media. As such, uninstalling the program involves several steps, including editing the registry. If you are not comfortable with this process, please call OrthoTrac Support so that a representative can aid in this process.

Uninstalling OrthoTrac on a Server

1. Remove the OMS folder, generally C:\OMS.

2. Remove the OMS-Spec folder, generally C:\OMS-Spec.

3. Uninstall SQL. This can be done through the add/remove programs section of control panel. You will be given options for removing SQL, be sure to uninstall the instance ORSQLEXP.

4. There are several registry entries that must be removed. Within regedit, remove keys from the following locations:

HKCU\SOFTWARE\ORTHOTRAC

HKCU\SOFTWARE\PRACTICEWORKS\ORTHOTRAC

HKCU\SOFTWARE\PWINC\ORTHOTRAC

HKEY_USERS\S-1-5-21-*\Software\OrthoTrac

HKEY_USERS\S-1-5-21-*\Software\PracticeWorks\OrthoTrac

5. Remove the file C:\WINDOWS\OMS.ini.

Uninstalling a Workstation

1. Remove the C:\OMS folder.

2. There are several registry entries that will need to be removed. Within regedit, remove keys from the following locations:

HKCU\SOFTWARE\ORTHOTRAC

HKCU\SOFTWARE\PRACTICEWORKS\ORTHOTRAC

HKCU\SOFTWARE\PWINC\ORTHOTRAC

HKEY_USERS\S-1-5-21-*\Software\OrthoTrac

HKEY_USERS\S-1-5-21-*\Software\PracticeWorks\OrthoTrac

3. Remove the C:\WINDOWS\OMS.ini file.

Tech Pack

Setting up the Server

Extra steps may be required as far as configuration of the server. This section includes configuration for automatically logging into the server and backing up the server.

Automatic Login

OrthoTrac requires the server be logged into the desktop for OrthoTrac to function on the workstations even if OrthoTrac is not going to be used on the server. OrthoTrac licensing runs as an application on the console session of the server. While the session can be locked, it should never be completely logged out.

1. From the Server, double-click the gold key in the Windows system tray.
2. Click the **Options** button.
3. Click the **Automatic Server Logon Configuration** button.
4. Enter the user name in the **User Name** text box.
5. Enter the password in the **Password** text box.
6. Click **OK** to save the changes.
7. Click **OK** to close the **PracticeWorks Server** window.
8. Verify that the computer now logs in automatically when the server is turned on.

If control over this functionality of your system by Carestream is not desirable, it may be best to contact Microsoft Support to find the best alternative to having an administrator automatically log in to the console session of the server.

Backing Up The Server

It is the responsibility of the client to make sure they have a current backup of the OrthoTrac data.

We recommend a backup during lunch and at the end of each working day.

The recommended methods for backing up data include online backup services and tape backup.

Please note that flash drives and CD-RWs have been found to be inconsistent in testing due to degradation. Whichever backup solution is used, it is best to ensure the media is removed from the office at the end of the day or kept in a fireproof safe.

Prior to running the system backup the user should go to **File**, **Prepare Backup** from the main menu of OrthoTrac. This process creates .bak files of the OrthoTrac databases in the \OMS\Backup\Most_Recent folder. These files can be used to easily restore OrthoTrac data. Keep in mind that these files are not the only ones that should be backed up and because this 'backup' is on the same hard drive as the original file, it is not a 'true' backup. The Prepare Backup process can also be automated by scheduling Windows to run the file OMS\Orthobac.exe. Because SQL runs using .MDF and .LDF files to store the physical data, and SQL may hold these files with a system lock sometimes preventing backup, we recommend skipping these files in your daily system backup and ensuring the \OMS\Backup folder, instead, is copied in your actual backup process.

If a scheduled backup is used be sure to schedule the Prepare Backup feature, or schedule the

Tech Pack

orthobac.exe process, prior to the actual file backup. We also recommend reading over the backup log each morning to ensure consistency.

Tape Backups

If data is being backed up to tape, keep the following in mind:

Keep two lunch backup tapes, one tape for each working day and two weekly tapes. For example, if the office is open Monday through Thursday, you would have two lunch backups that are used every other day, four daily backups and two weekly backups that would be used every other week.

We also recommend you do an end of month backup. It is a good idea to keep two end of month backups at all times. For example, if you are ending the month of January, you should have a January end of month backup as well as a December end of month backup.

Because backup media can malfunction or go bad, it is also a good idea to keep a spare backup tape in the event that one of your daily, weekly, or end of month backup disks are unusable.

We recommend taking physical backup devices off site when the office closes for the night in case of fires, flood, or other possibilities of system damage.

Be sure the client is trained to configure and use their backup system.

Recommended Files to backup:

Minimum Recommended Lunch Backup files are:

```
C:\OMS\Backup\Most_Recent\*.*
```

Minimum Recommended Daily Backup files and folders are:

```
C:\OMS\Backup\Most_Recent\*.*
```

```
C:\OMS\Fingerprint.mdb
```

```
C:\OMS\Daysheet
```

```
C:\OMS\Docs
```

```
C:\OMS\Snapshot
```

```
C:\OMS\Toothcht
```

```
C:\OMS\ECS
```

```
C:\OMS\ICCPS
```

Minimum Recommended Weekly Backup folders are:

OMS folder Location, generally: `C:\OMS`

Minimum Recommended Monthly Backup folders are:

```
C:\OMS
```

```
C:\OMS-Spec
```

Tech Pack

NOTE: These recommendations do not include backup information for Carestream Orthodontic Imaging.

Third Party Software

OrthoTrac integrates with multiple third-party vendors. As such, some configuration for clients that use these products may be required. Please note that this listing may not be a complete listing, and simply is used to aid with the most common issues.

Microsoft Word

Important Note: OrthoTrac does NOT work with any "Home and Office" version or any web-based versions of Word (Office 365).

We only support Microsoft Word for use of printing letters for the office. For acceptable Word versions for your current version of OrthoTrac, please see the system requirements documentation. Because OrthoTrac uses extensive macros in these processes, please make sure macros are allowed in the Word installation.

Microsoft Word in a Terminal Server/Citrix Environment

OrthoTrac makes extensive use of macros when printing Word documents. These documents access files that must be unique to each user. In Terminal Service and Citrix environments, multiple users are simultaneously accessing the same word processing resources, so these environments require a unique setup of database for use with Microsoft Word. By default, we use W:\, and recommend continuing to go with defined standards for ease of troubleshooting, though drive location can be changed. Drive location must be seen as a local drive on boot; a network drive will not suffice. We will also be covering the use of the utility AWPSUTILITY.EXE which can automate several parts of this process. This utility is included in versions 12 or later of OrthoTrac (it can be found in the \OMS-Spec\Utility folder on the server), and local configuration is performed when launching the program. More in-depth commands can be found if needed, but require a code of the day, which can be generated by Support if needed.

Definitions for Microsoft Word in a Terminal Server/Citrix Environment

Terminal Server – all references in this section to Terminal Server are referring to the server the users log in to remotely to access their OrthoTrac system.

Data Server – Data Server will refer to where OrthoTrac stores the Word documents, and does not necessarily in this case mean where the other data is stored. The data server and the Terminal Server may or may not be the same machine.

Data Files – the following files are used by OrthoTrac to export data from the database and to Word as an intermediary: Envelope.txt, Envelope.hdr, Omsawps.txt, and Omsawps.hdr. Each user must have explicit, unique access to these files, because two users writing to the same files at the same time will cause a data mismatch. The files, by default, are stored in the OMS folder but for offices using terminal services will be in a TEMP folder.

Changes to be made on a Data Server

Backup of OMS\DOCS before working toward resolution is strongly recommended. We will need to change ALL documents to have W:\TEMP be the primary data location. Macro settings in each individual .doc file pulls data from the Word data files.

© 2018 Carestream Dental LLC.

OrthoTrac is a trademark of Carestream
Dental Technology Topco Limited.
All trademarks and registered trademarks
are the property of their respective owners.

Email:
Title:
Code:
Page: 14 of 18

The first step towards this change will be to modify the OMS.ini on the server. If the server is a Terminal Server/Data Server combo, the OMS.ini will be located in %userprofile%\windows\OMS.ini for the user we are currently logged in for. Otherwise, it will be located in c:\windows\OMS.ini. Under the section [AWPS], ensure the datapath=w:\temp, and datasource=server.

The program AWPSUTILITY.EXE can be used to set the data source automatically as long as the OMS.ini for the user logged in is set correctly. When launching the utility, you can select the individual file, and select Repair Selected Document. Also, using the Support Login and a code of the day (which can be generated by Support if needed), you can repair all documents.

Changes to be made on the Terminal Server

The file rootdrv2.cmd should be installed if OrthoTrac is installed on the Terminal Server using install mode, but if it is not, it can be edited. This file can be edited using notepad. It should contain the following lines:

```
Set RootDrive=W:
Subst /d %RootDrive% >NUL: 2>&1
Subst %RootDrive% "%userprofile%"
```

Do not attempt to set up a w:\ with net use. If a drive other than W:\ is desired, it can be edited for use in rootdrv2.cmd.

ALL USERS must have a Temp folder with all OMS WORD DATA FILES required located in their user profile. ALL USER OMS.ini files located in %userprofile%\windows\OMS.ini must have datapath=w:\temp and datasource=server set. Adding these changes to the "default" profile will also ensure all users added to the system. NO TWO USERS SHOULD EVER BE ACCESSING THE SAME DATA PATH AND/OR SESSION, OR ERRORS WILL BE ENCOUNTERED.

Launching the utility AWPSUTILITY.EXE will attempt to automatically fix all users' profiles with the above information.

Changes to be made on All Local Workstations

(These changes are necessary because even though the local PCs are not using WTS, they must still access the AWPS documents using the same path and datasource that the WTS workstations do.)

Create drive C:\AWPSTEMP\TEMP. Copy all OMS WORD DATA FILES to this location. Create file wdrive.bat using notepad with the following information:

SUBST W: C:\AWPSTEMP

Run the newly created .bat file, and place in the user's startup folder in their Windows start menu.

Edit the OMS.ini located in c:\windows\OMS.ini. Under the section [AWPS], ensure the datapath=w:\temp, and datasource=server.

Launching the utility AWPSUTILITY.EXE will attempt to automatically perform the above settings.

Tech Pack

Antivirus

If the client maintains a continuous connection to the Internet it is advised that anti-virus software be installed. If anti-virus software has been installed, it is suggested that both active scanning of macros and of .doc and .dot files be disabled, as such active intervention can disrupt the automation of letter printing using AWPS. Also, the OMS folder on both the workstation and the server, and the OMS-SPEC folder, are recommended as exclusion points. Even with these settings in place, Support has noticed that several anti-virus programs will still find "false positives" and quarantine OrthoTrac files. While we cannot verify specific settings internally, several inconsistencies have been found with AVG.

Firewall

If a (hardware or software) firewall has been installed it must not interfere with internal network traffic and should only filter traffic between said internal network and the network of the upstream internet provider. Additionally, appropriate port mapping may be required by configuring the firewall insofar as it is necessary to allow for support to connect using Bomgar or other such remote administration software as discussed in the aforementioned system requirements document.

Bomgar

Bomgar is a remote connection utility that allows Carestream support professionals to connect to the user's system. This is done by having the user go to a web site (http://webassist01.carestream.com/) where they can enter a session key provided by the support professional assisting them and with a few clicks the necessary files are downloaded and the support professional has complete control of the local workstation. With Bomgar, there is nothing that needs to be installed by the local user, but they do need to have the permissions necessary to download files.

When the Carestream support professional logs out of the client's system all files that were downloaded are removed from the system.

Overall, Bomgar is the best choice for the connection between the client and Carestream. We have found it easy to direct the users to the web site and get us connected and, of course, there is no cost to the client. In some situations a representative can connect via RDP or VPN connections, however, we strongly recommend against these connections, as they are far less secure.

Non-Admin Settings

OrthoTrac software is optimized to run under an operating system user account with administrative privileges, as a member of the Administrators group. In order to run the software without making the user account a member of the Administrators group, some changes must be made to the restricted user's permissions. Some additional changes must be made to run specific features. This document describes these changes. Generally speaking, where appropriate, these changes should include read, write, and modify permissions.

Global Permissions

HKEY_LOCAL_MACHINE\Software\PWInc

Permission to INI files: OMS.ini, etc.

Permission should be granted to all INI files used by the application, including particularly OMS.ini. This is a concern when the INI file is stored in the Windows folder, typical for standalone workstations. Under a Terminal Services environment, the INI is stored in the user profile, and this is usually not a concern.

Server Permissions

HKEY_Local_Machine\Software\Microsoft\Windows\CurrentVersion\Run

Workstation Permissions

Full read\write\modify access to the OMS and OMS-SPEC folder and all of its files and subfolders housed on the server, and the c:\oms folder (regardless of install settings).

Features

Several features as well may require access to different registry keys and locations.

Electronic Services:

If a user is using eServices, they must be a full administrator on the machine. Contact eServices Support for further details at 888-730-9284.

HIPAA Auto-Logoff:

HKCU\System\Microsoft\Windows\CurrentVersion\Policies\System

Carestream Orthodontic Imaging:

CSOI recommends user to be given full administrative privileges as this listing may not cover the full range, as multiple devices and alterations to unique imaging installs may cause further registry entries to be required. The IMAGE folder on the server will need full rights. Additionally, the following keys, at least, are required, though there may be more (please note it may be under wow6432node where appropriate):

HKLM\Software\Practiceworks\Image

HKCU\Software\Practiceworks\Image

Access to System Time

Limited users cannot change the system time. OrthoTrac software requires that computers are set to the correct time in order to ensure certain time-dependent features, such as the Scheduling module and the Patient Flow module, work correctly. Administrators will have to ensure that the time is correct in these cases. However, this is a case where limiting user access may be worth considering, as if the user accidentally sets an incorrect system time, this can have adverse effects on the Patient Flow and Charting.

Frequently Asked Questions

Q: Can I run OrthoTrac on Windows 8.1 and 10/Mac/Linux/Unix/OS2 or some other operating system not listed in the System Requirements?

A: We only list the operating systems we have tested with OrthoTrac. OrthoTrac only runs in Microsoft Windows. We have tested on a Mac using a VM or dual boot but not any other type of Windows emulator. In the past we have not completed our testing of OrthoTrac on new Windows operating systems until the release of the first service pack for that OS.

Q: Will OrthoTrac work running in a virtual server?

A: While OrthoTrac will work running in a virtual environment, we have not tested in this environment, and we have encountered multiple clients who have run into severe data connectivity issues when running in a virtual environment. Finally, we have experienced several issues involving updating virtual environments. As such, Carestream's official policy is that virtual environments are unsupported. We would strongly recommend against using a virtual environment and we cannot guarantee we will be able to assist if problems are encountered in a virtual environment.

Q: What about Small Business Servers?

A: OrthoTrac will not work properly on a Small Business Server.

Q: What happens if I use hardware or software that support tells me is not supported?

A: Carestream will attempt to remedy situations that may arise from using non-supported hardware and software, however, in situations where we cannot find a way to resolve the issue with the technology the client is using, we may recommend using supported systems to resolve the issue. In all cases where data is involved we will work with the client to the best of our ability to ensure the stability and reliability of their data regardless of technology used.

Q: Can I get the user name and password for SQL?

A: The data belongs to the client, and we will always work with the office to ensure access to their data, however, the structure of data is proprietary to Carestream Dental. As well, in cases where access to the office's data is given, we cannot verify in a court of law that the client's data has not been tampered in cases where an office's data is called into question. As such, we do not provide access to the database, as a precaution to the office.

Q: Can I run the license server as a service?

A: We have seen multiple offices who have found a way to encapsulate the license as a service, however, as we have done no testing in-house on this, we cannot support this setup, and will recommend changes to the office to run the license as a regular application on launch.

Q: Can I use a wireless network?

A: OrthoTrac requires stable and expedient networking. Multiple errors can occur without a consistent data throughput, not limited to but including SQL disconnects, and load flow array errors that may disrupt the office's work flow. As such, we do not recommend wireless networks for mission critical stations.