

OR600-01

OrthoTrac, a Sensei product

Technician's Installation Guide

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Overview

This **Technician's Installation Packet** (Tech Pack) outlines the responsibilities of the local technician, and how support can assist. This document covers recommended hardware, network, and software configurations. It also contains information on configuring OrthoTrac, a Sensei product, as well as migrating the data to a new server, and maintaining and backing up data and files for OrthoTrac.

OrthoTrac is a critical systems application that must be running every day with as little down time as possible. In addition to the application, the hardware is critical to ensuring the stability of an automated practice management system. Our hardware recommendations follow what has been tested. Carestream Dental is only able to test OrthoTrac in a limited number of environments. OrthoTrac 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 environments that do not meet the requirements listed in the current **Systems Requirements**.

Carefully read and follow the installation instructions in the **Installation Guide** and recommendations contained within this **Technician's Installation Guide**. If you have any questions, contact OrthoTrac support.

Technician Acknowledgement

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

The local technician is fully responsible for making sure the hardware is configured and the client is trained to save and restore a backup of the OrthoTrac data and all necessary files for OrthoTrac. Since there are many types of backup programs, OrthoTrac support does not train offices on configuring the backup system or restoring a database. If an office must send data to OrthoTrac support for in-house analysis, send backups on external hard drives / flash media, or internet transfers. No other forms of backup media are accepted for data analysis. Addendums to installation documents will be made as necessary.

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

OrthoTrac representatives are highly trained and capable of assisting you to ensure a smooth software/hardware installation and systems upgrade. When contacting support, be sure to have the client's account or phone number ready.

Questions can be emailed directly to orthotracsupport@csdental.com or call support at 866.722.2567.

System Requirements, Installation Basics, and Configuration

Before installing OrthoTrac or migrating the data, review the following items in the [Resource Library](#):

- **System Requirements** – Review before proceeding to ensure the hardware meets or exceeds the current requirements. For questions on versions of Windows, peripherals, third-party software versions, and other software requirements, reference the OrthoTrac system requirements.
 - [Locally Hosted or Shared Server System Requirements](#)
 - [OrthoTrac Cloud System Requirements](#)
- **Configuration Guide** – Review the current configuration recommendations.
- **Installation Guide** – Follow the steps to perform an upgrade or new installation.

OrthoTrac Installation Guide

This guide is meant as a supplement to the **OrthoTrac Installation Guide**. The installation guide contains the most recent step-by-step instructions. In addition to the [Resource Library](#), a copy of the **OrthoTrac Installation Guide** is located in the following locations:

- **Documentation\Manuals\OR200_OrthoTrac_InstallationGuide.pdf** on the installation ISO
- **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. If the office is using **Carestream Dental Orthodontic Imaging**, install imaging on the server.
4. Restore any existing data.
5. Map workstations to the shared folder on the server.
6. Install **OrthoTrac** on the workstations.
7. If the office is using **Carestream Dental Orthodontic Imaging**, install imaging on the workstations.
8. Install **OrthoTrac** on any **Remote Desktop Services** servers.
9. If the office is using **Carestream Dental Orthodontic Imaging**, install Orthodontic Imaging on the **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 wants to house multiple data sets to further separate their offices, assistance may be required from a support 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. Version 15 will install MS SQL 2014 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 presented with an option 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 Dental 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 two individual servers 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. These restrictions could affect performance. 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 want to share a single data set between the locations will need to 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 does not actually run OrthoTrac locally; the application is 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 Dental Orthodontic Imaging with multiple office locations increases the variables and methods of setting up the office. We recommend discussing the options with Carestream Dental Orthodontic Imaging support or implementations team prior to setting this up. Some questions to consider before contacting support are:

- Will images acquired in one office need to be accessible in all offices?
- What digital imaging equipment will be used in each office?
- What internet connections are available in each office and what is the bandwidth?

OrthoTrac Installer File for Locally Hosted Offices

Beginning with version 15.1.3, the **OrthoTrac Installer** is available for download via the **Dental Practice Management Software Download Service**.

Important: The file on the **Dental Practice Management Download Service** is for your practice only and is unique to your login. The download will expire after 24 hours.

1. Save the **OrthoTrac Installer** file to the server.
2. Follow the procedures in this document to install or update OrthoTrac.

Download the Installer Files

1. On the server, go to <https://softwaredownload.csdental.com/en-US/>. The **Dental Practice Management Software Download Service** login window is displayed.
2. Enter the **Customer ID** and **Zip Code**.
3. Click **Submit**. The installer file download is displayed, along with instructions.
4. Click **Download** and save the file to the default download location.

Installation and Migration

Whether a client is a new or 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 Carestream Dental Orthodontic Imaging is installed. This enables the two programs to communicate properly.

It is also recommended to call support a few days before your planned update or install 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.

Installing OrthoTrac On a New Server

All workstations must be able to access the **OMS** parent folder on the server. If you do not want to share the root of the **C:** drive on the server, be sure to change the destination folder during the installation 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 wants to install OrthoTrac on *D:\data*, you must install OrthoTrac to *D:\data\oms* and *D:\data\oms-spec*, sharing the *D:\data* folder on the network. Then map the network drive on the workstations (generally **U:**) to the shared data folder on the server.

Before installing, OrthoTrac searches 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 [Server Updates](#) section of this document.

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

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

1. Verify all users are logged out of OrthoTrac.
2. Start OrthoTrac on the server.
3. Have a staff member log into OrthoTrac.
4. Select **File > Prepare Backup**.
5. Wait for the **Prepare Backup** process to complete.
6. Select **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** folder.
9. 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, and TxCard**. The xxx is the backup count; the first backup of the day is *001*. **For example:** Main_OMS_20130505_001.bak

If the client is using Carestream Dental Orthodontic Imaging v10 or higher:

- 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.
10. Close **OrthoTrac**.
 11. Right-click on the key icon in the system tray.
 12. Click **Exit PracticeWorks Server**.
 13. Install OrthoTrac on the new server.
 14. 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.
 - \OMS\filelist.nrl

Note: By default, files with filename extension, such as *.000, .001, .003* and *.nrl*, as listed above, 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\Fingerprint.mdb
 - \OMS\roll*.txt
 - \OMS\AuditTx.dat

15. Copy the following folders from the old server to the **OMS** folder on the new server. Some of the folders listed may not exist on the old server:
 - \OMS\ACH
 - \OMS\Backup
 - \OMS\Daysheet
 - \OMS\Docs
 - \OMS\ECS
 - \OMS\Epayment
 - \OMS\ICCPS
 - \OMS\Snapshot
 - \OMS\ToothCht
 - \OMS\Orthometrics
16. If the new server will be the imaging server, copy the following folder from the old server to the **OMS** folder on the new server:
 - \OMS\image
17. On the new server, run the **URestore** utility located in the **c:\oms-spec\utility** folder.
 - Agree to the notification page.
 - Click **Next**.
 - Deselect the **Perform backup** option.
 - Click **Next**.
 - Select the **Most_Recent** folder from the backup folder just copied.
 - Click **Next**.
 - Continue through the procedure to restore the most recent copy of the office's data to the new server.
18. Set the workstations to look to the new server.
 - Remap the network drive for OrthoTrac to the parent folder of the **OMS** folder on the server.
 - Verify all references to the old server are renamed in **c:\windows\OMS.ini**.
 - Select **Options** in **c:\windows\system32\pwclient.exe** (syswow64 for 64-bit installations).
 - Verify the path is set to the new server.
 - Run **c:\oms\pwisetloc.exe**.
 - Verify the proper data locations are selected.

Migrating an Existing Version 10 to a Version 11 or Higher Server

We recommended that you work with support before migrating to a new server. 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 17 will require support assistance to update the MDB files from the old server's OMS folder to version 11 or higher data.

Note: Since the process is a transition between two different data structures, it 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 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 to the OMS folder. It will prevent the workstation from updating correctly. If a drive other than **U:** is used, 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 that expects the use of the **U:** drive designation.

Notes:

- 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.
- In all installations, the **DataPath=** line in the **[Awps]** section of the **OMS.ini** file should always point to the local installation of OrthoTrac. **For example:** *DataPath=C:\OMS*

Installation Across the Network

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

This solution assumes the server is named **Server** and you are installing OrthoTrac on a workstation that is already connected to the network with proper permissions to access the server. This solution also assumes 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. From the Windows desktop, 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 prompts for a reboot.
5. After the computer has rebooted, log into OrthoTrac to confirm the installation was successful.

New Terminal Server Installation/Citrix Environments

Installation to a Terminal Server 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 is placed in each user's **%userprofile%\windows** folder instead of the local C:\Windows folder. See the [Microsoft Word in a Terminal Server/Citrix Environment](#) section for details on setting up the office to print letters in a Terminal Services environment if the office will be printing letters directly from their Terminal Server.

Licensing and Registration

Before removing any software from the old server, copy the contents of the **PWSVR** folder which contains the license file.

Notes:

- This **PWSVR** folder is normally installed within the **OrthoTrac** folder on the data server. This location may vary if the office is using Carestream Dental Orthodontic Imaging.
- Install the license file on the new server before installing the software on the workstations.
- If you do not have a current copy of the license file, contact support. The support team can either send a copy via email or connect to the server and upload a copy.

Installing the License File

When a prompt to install the license file is displayed while installing or opening OrthoTrac, do the following:

1. Browse to the location of the saved **PWSVR** file.
2. Select the file.
3. Click **OK**.

Registering the Software

When a prompt to register the software is displayed while installing or opening OrthoTrac, register the software using one of the following methods:

- **Register online via the internet**
- **Contact support by phone**

Note: If you are unable to register the software at this time, click **Cancel** to continue with the update. You have seven days to register the product.

To Register via the Internet

1. Select **Automatically via the Internet**.
2. Click **OK**. The **Registration Code** window is displayed while the code is generated. After the registration code is obtained, the **Installation Complete** window is displayed.
3. Click **Finish**.

Note: If you have registered the software more than three times, you will be required to contact support to receive a registration code.

To Register by Phone

1. Select **Contact support by telephone**.
2. Click **OK**.
3. Contact support using one of the following methods:
 - Call 866.722.2567.
 - Email orthotracsupport@csdental.com.
4. Provide the **Customer ID** and **Hardware ID** information from the **Registration** window when contacting support. These numbers are used to generate the **Registration Code**.
5. Type the registration code in the **Registration Code** field.
Note: Use capital letters when typing the registration code.
6. Click **OK**. The **Installation Complete** window is displayed.
7. Click **Finish**.

Backup Recommendations

This section covers recommendations for configuring a backup routine for OrthoTrac data and related files. When setting up the backup routine, review the following sections in the **OrthoTrac Configuration Guide** in the [Resource Library](#) for more information.

- Backing Up Data
- Using a Backup Checklist
- Establishing a Backup Routine
- Managing Files and Backup Media

Note: If the data was installed in a location other than the default directory, configure the backup system to back up the actual data location.

Backing Up the Server

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

We recommend making 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.

Note: 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 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 the daily system backup and ensuring the **\OMS\Backup** folder, instead, is copied in the actual backup process.

If a scheduled backup is used, be sure to schedule the **Prepare Backup** feature, or schedule the **Orthobac.exe** process, prior to the actual file backup. We also recommend reading over the backup log each morning to ensure consistency.

Tape Backups and Backup Frequency

When using a tape backup, 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, at the end 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 the daily, weekly, or end of month backup tapes 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 Back Up

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
- C:\OMS\ACH

Minimum recommended weekly backup folders are:

- OMS folder location, generally: C:\OMS

Minimum recommended monthly backup folders are:

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

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

Updating

Before updating OrthoTrac, you should back up the server. For more information, see the [Backing Up the Server](#) section of this document.

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

To update the server, download the installation files from the digital download website and mount the ISO on the server.

Note: **OSetup.exe** should always be run on the server. The update always begins 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.

Note: The switch is case-sensitive and must be all uppercase. For example: **D:\WSetup.exe /PATH=C:\OMS**

Workstation Updates

Typically, 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 into the Terminal Server before updating OrthoTrac, since the software will not install properly if users are logged into 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: After the update is complete, the Terminal Server must be set back to execute mode by running **change user /execute**.

Permissions and Settings

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. Double-click the **gold key** in the Windows system tray on the server.
2. Click **Options**.
3. Click **Automatic Server Logon Configuration**.
4. Type the user name in the **User Name** field.
5. Type the password in the **Password** field.
6. Click **OK** to save the changes.
7. Click **OK** to close the **PracticeWorks Server** window.
8. Verify the computer now logs in automatically when the server is turned on.

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

Non-Admin Settings

OrthoTrac is optimized to run under an operating system user account with administrative privileges, as a member of the **Administrators** group. 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 the **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 and 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)

Access to System Time

Limited users cannot change the system time. OrthoTrac requires that computers are set to the correct time to ensure certain time-dependent features, such as the *Scheduling* and *Patient Flow* modules, work correctly. Administrators will have to ensure 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* modules.

Features Requiring Registry Edits

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.

HIPAA Auto-Logoff:

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

Carestream Dental Orthodontic Imaging

Carestream Dental Orthodontic Imaging (CSOI) recommends users 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 are required, though there may be more. **Note:** It might be under *wow6432node* where appropriate.

- HKLM\Software\Practiceworks\Image
- HKCU\Software\Practiceworks\Image

Third Party Products

OrthoTrac integrates with multiple third-party vendors. Some configuration for clients that use these products may be required.

Note: This listing is not a complete list of third-party integrated products used by the office. It is used to aid with the most common issues. For a more comprehensive list of third-party products integrated with the software, refer to the [System Requirements](#).

Microsoft Word

IMPORTANT: OrthoTrac does NOT work with any *Office, Home, Student* or any *web-based versions of Word (Office 365)*.

We only support **Microsoft Word Professional** versions for printing letters for the office. For acceptable Word versions for your current version of OrthoTrac, see the [System](#)

Requirements. Because OrthoTrac uses extensive macros in these processes, make sure macros are allowed in the Word installation.

Microsoft Word in a Terminal Server or 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 database setup for use with Microsoft Word. By default, we use **W:**. Though the drive location can be changed, we recommend continuing to go with defined standards for ease of troubleshooting. The drive location must be seen as a local drive on boot; a network drive will not suffice. This guide will also cover the use of the [**AWPSUTILITY.EXE**](#) which can automate several parts of this process. This utility is included in versions 12 or higher of OrthoTrac. It can be found in the **\OMS-Spec\Utility** folder on the server. Local word processing 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 OrthoTrac 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 access their OrthoTrac system.

Data Server – Data server refers to where OrthoTrac stores Microsoft Word documents, and does not necessarily 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 use Word as an intermediary:

- Envelope.txt
- Envelope.hdr
- Omsawps.txt
- 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, the files will be stored in a **TEMP** folder.

Changes to Be Made on a Data Server

IMPORTANT: We strongly recommend making a backup of the **OMS\DOCS** folder BEFORE following these instructions.

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.

The first step towards this change is 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 currently logged in. Otherwise, it will be located in **c:\windows\OMS.ini**. In the **[AWPS]** section of the **OMS.ini**, verify the following lines: **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 an

individual file, and click **Repair Selected Doc(s)**. You can also **Repair All Documents** using the *Support Login* and a *code of the day*, which can be generated by OrthoTrac support if needed.

Changes to Be Made on the Terminal Server

The file **rootdrv2.cmd** should be installed if OrthoTrac is installed on the Terminal Server using the installmode, 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 that these settings are applied to all new users when they are added to the system. NO TWO USERS SHOULD EVER BE ACCESSING THE SAME DATA PATH 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

Note: The following 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 data source that the WTS workstations use.

1. Create drive **C:\AWPSTEMP\TEMP**.
2. Copy all **OMS WORD DATA FILES** to this location.
3. Create file **wdrive.bat** using notepad with the following information:
 - **SUBST W: C:\AWPSTEMP**
4. Run the newly created **.bat** file.
5. Place the **.bat** file in the user's startup folder in their Windows start menu.
6. Edit the **OMS.ini** located in **c:\windows\OMS.ini**. In the **[AWPS]** section, verify the following lines: **datapath=w:\temp**, and **datasource=server**.

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

Antivirus

If the client maintains a continuous connection to the internet, it is advised that antivirus software be installed. If antivirus 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. We also recommend adding the **OMS** folder on both the workstation and the server, and the **OMS-SPEC** folder on the server to the exclusions list of your antivirus software. Even with these settings in place, support has noticed

that several antivirus programs 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 the 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 remote administration software as discussed in the [System Requirements](#).

Uninstalling OrthoTrac

IMPORTANT: 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, 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 the **Control Panel**. You will be given options for removing SQL.
 - Be sure to uninstall the instance of **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 OrthoTrac on 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.

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, OrthoTrac support'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: OrthoTrac support 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.

Related Documentation and Resources

Additional information available in the [Resource Library](#):

- Initial Training Workbook
- Online Help
- Release Notes
- Link to our virtual agent, Cassidy
 - <https://gosensei.com/pages/orthotrac-support>

Cassidy is Carestream Dental's AI-powered virtual agent offering 24/7/365 online customer support. When you need a quick step-by-step guide or question on product needs, information is instantly available via Cassidy.