

DE350-01

SoftDent, 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 SoftDent, a Sensei product, as well as migrating the data to a new server, and maintaining and backing up data and files for SoftDent.

SoftDent 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 SoftDent in a limited number of environments. SoftDent 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 SoftDent 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 the recommendations contained within this **Technician's Installation Guide**. If you have any questions, contact SoftDent 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 SoftDent data and all necessary files for SoftDent. Since there are many types of backup programs, SoftDent support does not train offices on configuring the backup system or restoring a database. If an office must send data to SoftDent 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 SoftDent products are welcome. We recommend that you be familiar with the client's Windows operating system and carry an MCSE (Microsoft Certified Systems Engineer) certification or equivalent on staff.

SoftDent 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 softdentsupport@csdental.com or call support at 866.435.7473.

System Requirements, Installation, and Configuration

Before installing SoftDent 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.
 - [Locally Hosted or Shared Server System Requirements](#)
 - [SoftDent Cloud System Requirements](#)
- **Configuration Guide** – Review the current configuration recommendations.
- **Installation Guide** – Follow the steps to perform an upgrade or new installation. Select the link below for the installation and update guide for the version of SoftDent used.
 - [SoftDent Non-SQL Multi-User](#)
 - [SoftDent Non-SQL Client-Server](#)
 - [SoftDent SQL Multi-User](#)
 - [SoftDent SQL Client-Server](#)

Installation Recommendations

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

- Purchase only fully tested devices listed in the [System Requirements](#).
 - While some non-recommended hardware performs acceptably with SoftDent, it remains the responsibility of the hardware technician to maintain the performance of the non-recommended hardware in question. If you are unsure as to whether a particular device is compatible with SoftDent, email softdentsupport@csdental.com or call support at 866.435.7473.
- Train the office staff to configure the backup system to back up the required files for SoftDent.
 - The default directory for the *multi-user version* of SoftDent is **C:\SoftDent** on the server.
 - The default directory for the *client-server version* of SoftDent is **C:\Server**.
 - If the office performs imaging through SoftDent, including digital x-rays, patient portraits, and intraoral photography, the default directory for SoftDent images is **C:\PWImages** and should be included in the backup configuration.
 - If the data was installed in a location other than the default directory, configure the backup system to back up the actual data location.
- SoftDent support does not support backup system configurations or the restoration process.
 - Training the office staff on back-up restoration procedures increases productivity and decreases service calls.
- Encourage the office staff to keep the SoftDent support phone numbers and account information in a convenient location. In the event of an emergency, it is critical that they can reach us quickly.

Configuring the Hardware Environment

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

- Unless expressly stated in the hardware specifications, use commercial class hardware versus consumer class or white box computers.
- Set the screen resolution to **1280x1024** or higher to properly display information in SoftDent. In addition, set the font size to **Small (96 DPI)** or **Normal (96 DPI)**, depending on the operating system.
- Run SoftDent on a wired networking architecture only. Wireless networks have not been tested with the software and are not recommended due to interference and latency issues.
- Only install the **TCP/IP protocol** over the network and at each individual computer.
- Share the **SoftDent** folder with full permissions and security for everyone using the software.
- If using a Windows 7 and higher operating system, disable the **Sharing Wizard**, also referred to as **Simple File Sharing**.
- Any networked printers should use a **TCP/IP port** to the printer's IP Address.
- Configure the hardware and software firewall to open ports **13000** to **13025** internally.
 - If using the *Client-Server version* of the software, also open port **5597**. SoftDent sends data across these ports, and a firewall could potentially block this data.
 - *SQL requires* that ports **1433 (TCP)** and **9050 to 9060 (UDP)** are also open.
 - For offices utilizing a *multi-database installation* of SoftDent, an additional port past **13025** should also be opened for each additional database.
 - For example, a multi-database office with three databases installed should open TCP ports 13025, 13026, and 13027.
- All users should have their own Windows username and password within the network. Each Windows user profile should be an **Administrator** or **Power User**.
- When using Windows 7 and higher, make sure all users executing SoftDent have their own username and password.
 - SoftDent will not execute properly under a guest account.
- Assign all computers running SoftDent to the same domain or workgroup.
- SoftDent is not supported in virtual environments, such as VMware or OSX, as it has not been tested in such environments.
 - Performance may decrease as a result of using virtual machines.
- The PracticeWorks license server must be run within a console session.
 - The PracticeWorks license server will not execute properly within a Remote Desktop or terminal services session.
- **In domain environments, DNS should be configured on the SoftDent server, and all workstations should be pointed to the server's static IPv4 address for DNS resolution. External DNS resolution, such as IP addresses of ISPs or third-party DNS services, should not be used. Use of external DNS resolution may cause poor performance, errors, or other technical issues.**
- **Do not map any computer to the administrative shares.**

- Exclude the local and network directories for SoftDent and Carestream Dental Imaging from real time antivirus scans. The default locations of the directories to be excluded are as follows. Note some directories below may not be present for all offices:
 - C:\SoftDent
 - C:\Program Files (x86)\Carestream
 - C:\Program Files (x86)\Microsoft SQL Server
 - C:\ProgramData\PracticeWorks
 - C:\ProgramData\CareStream
 - C:\ProgramData\PWInc
 - C:\ProgramData\TW
 - C:\PWImages
 - C:\TW
 - \\SERVER\SoftDent (or the UNC path to the server's SoftDent folder)
 - S:\ (or the drive letter mapped to the server's SoftDent folder)
- If utilizing a domain controller, disable strong passwords during the SoftDent installation process. Strong passwords can be re-enabled after the installation process has completed.
- Realtime virus scans can slow processing times in SoftDent and Carestream Dental Imaging. The use of antivirus or security software that *stealth* ports, causing them to be hidden from other devices instead of simply closed, is not recommended.
- Many antivirus programs can disconnect network drives when checking for or updating new virus definitions and when scanning, which may cause issues with SoftDent. This issue is especially prevalent in Norton antivirus version 10.x.
- Make sure the server has adequate page file sizes.
- Configuring DNS on the SoftDent server or usage of hosts files can be used for DNS resolution.
 - If utilizing DNS, both forward and reverse lookup zones should be configured in DNS on the SoftDent server. **Unique names** and **static IP addresses** for each computer should be entered in both forward and reverse lookup. **Scavenging** and **Aging** options should be enabled to prevent stale or duplicate DNS records.
 - If using the hosts file, the **name** and **static IP address** of each computer should be specified within each hosts file of each SoftDent computer.
- Give full control and security permissions to the default server share and folder.
- **Power Management, Energy Efficient Ethernet, Green Ethernet**, or similar power saving options should be disabled on each computer's NIC.
 - Errors or technical issues may occur if these settings are not disabled.
- **Disable sleep mode** for all operating systems.
- Setting the SoftDent executable to **High Performance** under **Graphics** settings in Windows will improve performance in the SoftDent Chart.
- RAID 0 configurations are not recommended.
- If using SoftDent within a domain environment, make sure the reverse DNS is set up and running properly.
- All servers must have a physical keyboard, mouse, and monitor attached.

- Ensure the office is aware of the physical location of the server and at least one person knows the administrative username and password for the server. This is necessary for SoftDent support representatives to provide remote assistance.
- Offices using the *Client-Server version* of SoftDent, should attach the server to an uninterruptable power supply (UPS).
 - UPS devices with a USB data port are preferred, as they allow a shutdown script for **Client-Server** to be run in the case of a power loss.
- Make sure the printer that will be used with SoftDent uses an actual PCL5e or PCL6 series print driver.
 - **Do not** use an emulated PCL5e or PCL6 print driver.
 - Print drivers designed for the specific make and model of the printer in use are recommended over universal print drivers, when they are available.
- Networks may notice increases in overall network speed when using SoftDent if **Auto-Tuning, Remote Differential Compression, IPv6, and Offline Files** are disabled. We recommend flushing the DNS and restarting the computer after disabling these features.
- Ensure the **Link** and **Dual** speeds are set to **auto-negotiate**.
- Disable any wireless connections.
 - **Wireless network connections are prone to interference and poor performance**, and as such, are not supported for use with SoftDent.
- Ensure the network interface card drivers are up to date.
- Notable performance increases have been displayed when the maximum amount of RAM has been installed in servers that serve files to ten or more workstations.
- We recommend setting both the **Receive** and **Transmit** buffers on the NIC card for each computer to **512** for optimal performance.
- When performing a server migration for an office using Carestream Dental Imaging, the server name should be kept the same as the previous server. This will prevent the **Image Move Utility** from having to be run, which can take several hours.

Licensing and Registration

Before removing any software from the old server, ensure you have a copy of the **PWSVR** folder which contains the license file. If using the [Database Extractor Utility](#) to back up the SoftDent files on the old server, this file is included in the backup.

Notes:

- The **PWSVR** folder is installed within the **SoftDent** folder on the data server.
- Verify you can log into SoftDent on the server before installing the software on the workstations.
- If the **Install License File** window is displayed, follow the steps in the **Registering a new Software Installation** section of the **Installation Guide** in the [Resource Library](#).
- A prompt is displayed requesting a license file only if this is a new installation or upgrade from version 9.8 or earlier.
- If the office does not have a current copy of the license file, contact support. The support team can send a copy via email or connect to the server and upload a copy.

Backup and Restore Recommendations

This section covers recommendations for configuring a backup routine for SoftDent data and related files. When setting up the backup routine, review the following sections in the **SoftDent 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

Files to Back Up

The following list displays the minimum set of files and folders that must be backed up to ensure a valid SoftDent database is maintained. SoftDent support does not support the process of backing up or restoring data.

Directories	File Types
The following directories must be backed up: Custom CCFiles DBNotes (Versions 14.0 – 14.0.2 Only) EDIDATA History Letters Presentations Profiles PWImages PWSvr SDImages TW (If present within the SoftDent folder) XRays SDDB_# (Multi-Database Only) - SQL Database NextGenV2 or NextGenv2_Softdent (in the SoftDent Scheduler versions)	The following file types must be backed up: *.bak (Versions 15.0 and higher) *.dat *.idx *.def *.trl *.sys *.ini *.log *.tra

Utilities

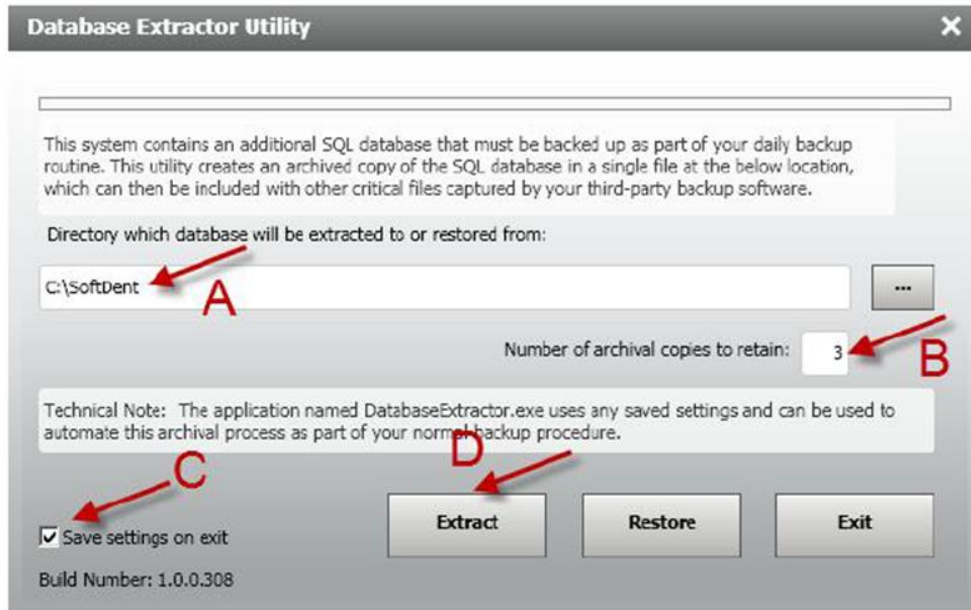
Database Extractor Utility

The **Database Extractor Utility** creates an archived copy of the SQL database in a single file.

Creating a Backup of the SQL Database Using the Database Extractor

1. Select **Programs > Carestream Dental** from the **Windows Start Menu**.

2. Select **Database Extractor Utility**. The **Database Extractor Utility** window is displayed.



3. Type the path for the backup file in the **Directory which database will be extracted to or restored from** field (A).
4. Set the number of previous backups to keep in the **Number of archival copies to retain** field (B).
 - If making only a single backup, this setting does not need to be changed and can be left as the default.
5. Select the **Save Settings on Exit** option (C).
6. Click **Extract** to begin the backup process (D).
 - Upon successful completion, a message is displayed stating The Extraction completed successfully.
7. Click **OK** to return to the **Database Extractor Utility** window.
8. Click **Exit** to close the utility.

Restoring a Backup of the SQL Database Using the Database Extractor

1. Select **Programs > Carestream Dental** from the **Windows Start Menu**.
2. Select **Database Extractor Utility**. The **Database Extractor Utility** window is displayed.
3. Click the **ellipsis** button at the end of the **Directory which database will be extracted to or restored from** field.
4. Navigate to and select the SQL backup location.
5. Click **Restore** to begin the restoration process.
6. Click **OK** to return to the **Database Extractor Utility** window.
7. Click **Exit** to close the utility.

Using Windows Task Scheduler to Schedule SoftDent Utilities

IMPORTANT: Read this section in its entirety before proceeding!

SoftDent versions 18.0 and 118.0 introduce the ability to schedule and automatically run the following utilities at a set time using **Windows Task Scheduler**:

- **Rebuild/Reindex**
- **Find Largest ID**
- **Find/Repair Corrupt**

This is done by creating **Basic Tasks** in **Task Scheduler** to run **SDutils.exe** with command line switches to run a specific utility. This works the same way as scheduling **Faircom CTSTART/CTSTOP/CSNodes/TermApp** using **Task Scheduler**.

Scheduling Nightly Backups to Avoid Conflicts

A full non-incremental backup of the SoftDent data, including the SoftDent folder and any SoftDent SQL data, should be performed nightly and should be complete before the start time of any scheduled utilities. SoftDent support is not responsible for:

- Setting up or assisting with the setup of nightly backups.
- Specifying or recommending the backup system to use.
- Configuring the selected backup system.

Configuration and execution of nightly backups is the exclusive responsibility of the client and their local technician.

Total backup time varies from office to office and from day to day.

- Start time for the utilities should be scheduled late enough to allow backups to complete.
 - **For example:** If the backup takes approximately 2 hours to finish, the scheduled utilities could be set to start 3 hours or longer from the backups start time to allow time for the backup to complete. This allows for a buffer in case the backup takes longer than expected.
- Offices or their technicians are encouraged to routinely check their backup system to verify it is functioning properly.
- All SoftDent sessions must be closed prior to running scheduled utilities.
- Scheduled utilities must also be configured to run consecutively. The utilities cannot run simultaneously.
- To ensure the utilities do not conflict with each other, pad the time between the expected end of one utility and the start of the next utility.
 - **For example:** If **Rebuild/Reindex** takes approximately 2 hours to run, schedule **Find Largest ID** to start 2.5 hours after the scheduled start of **Rebuild/Reindex**.

Configuring Task Scheduler to Run SDUtils.exe

Use the following steps to schedule SoftDent utilities to run at a specified time.

Note: Some of the steps and screen captures may vary slightly depending on the **Windows Task Scheduler** version.

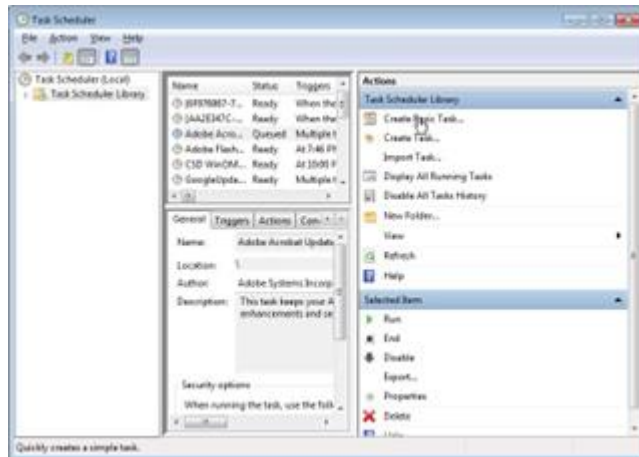
1. Select **All Programs > Administrative Tools > Task Scheduler** from the **Windows Start** menu.

- This path can vary depending on the Windows version. Another option is to search for the **Task Scheduler** from the **Windows Start** menu.



2. Select **Create Basic Task** in the **Actions** pane.

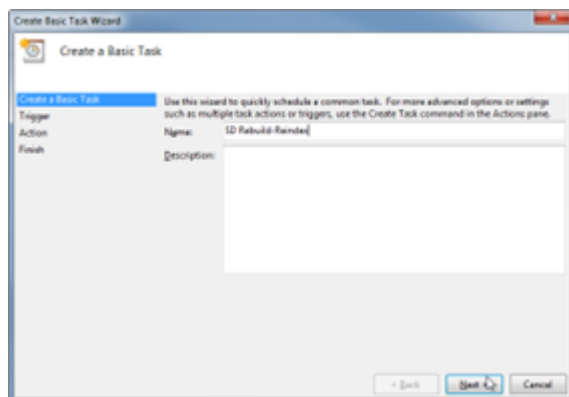
- For some versions of Task Scheduler, this command may be in the **Actions** menu.



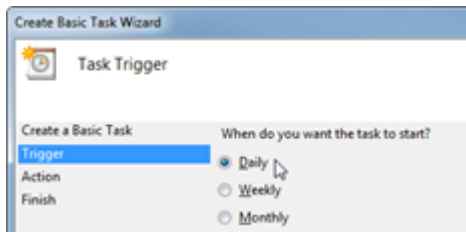
3. Type a task name in the **Name** field.

4. (Optional) Type a description for the task in the **Description** field.

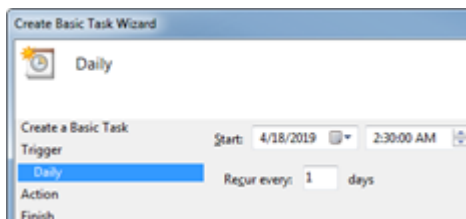
5. Click **Next**.



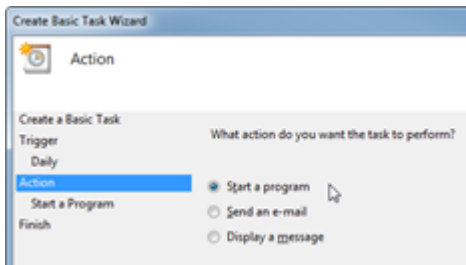
6. Select **Daily** as the **Task Trigger**.
7. Click **Next**.



8. Select an appropriate date and time in the **Start** fields.
9. Set the option in the **Recur every ____ days** field to **1**.

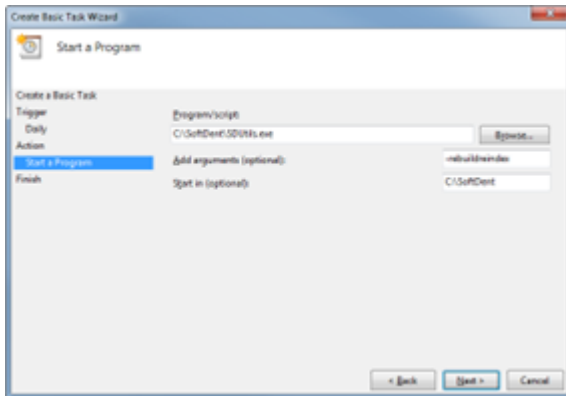


10. Click **Next**.
11. Select **Start a program** as the **Action** to perform.
12. Click **Next**.



13. Type **C:\SoftDent\SDUtils.exe** in the **Program/script** field.
 - If the office uses **Client-Server**, type **C:\Server\SDUtils.exe** in the **Program/script** field.
14. Type **-rebuildreindex** in the **Add arguments** field.
15. Type **C:\SoftDent** in the **Start in** field.
 - If the office uses **Client-Server**, type **C:\Server** in the **Start in** field.

16. Click **Next**.



17. Click **Finish**.

18. To schedule **Find Largest ID**, repeat the preceding steps, replacing the text in the **Add Arguments** field with **-findlargestid**.

- Remember to set the **Start** time of this utility late enough so the previous utility will have completed.
- **For example:** If **Rebuild/Reindex** starts at 12:00 AM and takes 1.5 hours to run, **Find Largest ID** could be set to start at 2:00 AM.

19. To schedule **Find/Repair Corrupt**, do the following:

- To run on all files INCLUDING **visanettrans.dat**, repeat all of the above steps, replacing the text in the **Add Arguments** field with **-findrepaircorrupt**.
- To run on all files EXCLUDING **visanettrans.dat**, repeat all of the above steps, replacing the text in the **Add Arguments** field with **-findrepaircorrupt -visa**.
 - Remember to set the **Start** time of this utility late enough so the previous utility will have completed.
 - **For example:** If **Find Largest ID** starts at 2:00 AM and takes 15-minutes to run, **Find/Repair Corrupt** could be set to start at 2:30 AM.

SoftDent Installer File for Locally Hosted Offices

Beginning with version 19.0.1, the **SoftDent Installer** is available for download via the **Dental Practice Management Software Download Service**.

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

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.

Note: If the downloaded file is zipped (.zip), right-click and select **Extract All**.

Installing SoftDent on a New Server

Follow the steps in the **Installation Guide** in the [Resource Library](#) to install SoftDent. Select the link below for the installation and update guide for the version of SoftDent used.

- [SoftDent Non-SQL Multi-User](#)
- [SoftDent Non-SQL Client-Server](#)
- [SoftDent SQL Multi-User](#)
- [SoftDent SQL Client-Server](#)

Migrating the Data to a New Server

Note: If the office is using Carestream Dental Imaging, the server name should be kept the same to avoid running the **Image Move Utility**. This utility takes 4 or more hours to run.

When the install has completed on the new server, do the following:

1. Close out of the **PracticeWorks Server Key** and **SD TaskManger**. These executables are displayed in the **Windows System Tray**.
 - See the **Installation Guide** in the [Resource Library](#) for the installation process.
2. Stop all Carestream Dental services in the **Control Panel > Administrative Tools > Services**.
3. Restore a backup copy of the data from the original server location on top of the new SoftDent location on the new server.
4. Restore a backup copy of the SQL database using the restore function in the [Database Extractor Utility](#).
5. Reboot the computer.
6. When the **Server full** message is displayed, test the restored data by opening Softdent and reviewing the data.

Third Party Products

SoftDent integrates with multiple third-party vendors. As such, 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](#).

Integration Between SoftDent and Carestream Dental Imaging

The prerequisites for setting up Carestream Dental Imaging installations are as follows:

1. Install **SoftDent** first.
2. Set the SoftDent **Image Storage Drive** default path located under **System > Change System Settings > Video Options** to a UNC path that is shared through the network with full control. The path should look similar to the following:
 - **Global Image DB 0:** `\\server\<one directory below the image location>`
3. Share all locations for previous SoftDent **SDImages** and **TW images** folders across the network with full control.

Uninstalling SoftDent Components

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

Uninstalling the PracticeWorks License File Server

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

Notes:

- A copy of the license file is needed to re-register SoftDent because the **License File (PWLF.dat)** is deleted along with the **PWSvr** folder when performing this process.
- If the office does not have a current copy of the license file, contact support. The support team can send a copy via email or connect to the server and upload a copy.

To automatically uninstall the **PWSvr.exe** file, do the following:

1. Make a copy of the **PWSvr** folder located on the server.
2. From the Windows desktop, click **Start > Run**.
3. Type **PWClient**.
4. Select **Options** and **Uninstall License Server** in the **Client Options** window.
 - The **PWSvr** folder in **SoftDent** folder and the registry keys associated with the **License File Server** are deleted.
 - The **PWSvr** registry key is located at **HKEY Local Machine > Software > PWInc**.

If a manual uninstall is necessary, do the following:

1. Make a copy of the **PWSvr** folder located on the server.
2. Disable the **PWSvr.exe** application.
3. Delete the **PWSvr** folder and the registry key.

Uninstalling SoftDent

To uninstall SoftDent, the *program*, *data files*, and *registry keys* must be uninstalled. The easiest way to do this is to run the Windows operating system **Add/Remove Program** utility.

- If running the Windows operating system automatic uninstall, upon completion do the following:
 1. Delete the **SoftDent** folder.
 2. Delete the registry keys.
- If performing a Windows operating system custom uninstall, when prompted to select all the files to uninstall, select **All** for every portion of the uninstall to remove SoftDent from the computer's hard drive and registry.

If a manual uninstall is necessary, do the following:

1. Delete the **SoftDent** directory.
2. Delete the **SoftDent** folders from the following locations in the registry:
 - **HKEY Local Machine > Software > Infosoft**
 - **HKEY Current User > Software > Infosoft**

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/support-softdent>

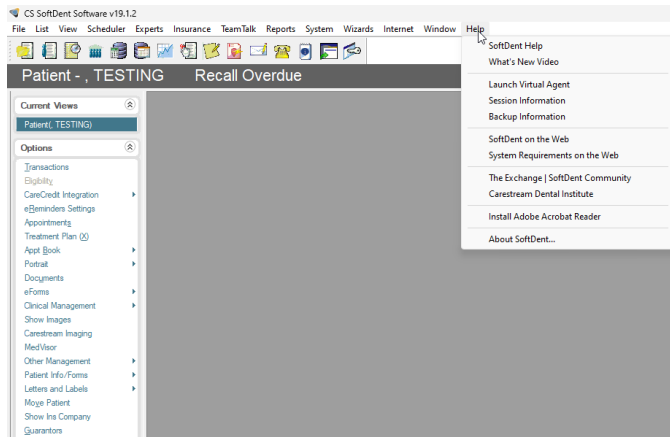
Cassidy is Carestream Dental's AI-powered virtual agent offering 24/7/365 online customer support. When you need a quick step-by-step guide or question on product needs, information is instantly available via Cassidy.

Launching Cassidy from Softdent

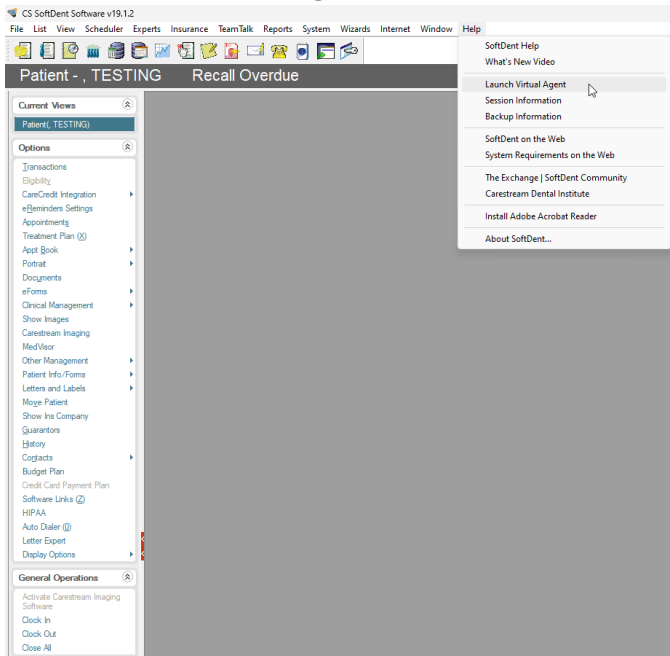
Starting with SoftDent v 19.1.2, released in September 2023, you can launch Cassidy directly from the SoftDent interface. This enhancement gives you convenient access to support resources within your work environment, eliminating the need to visit the website.

To launch Cassidy from SoftDent:

1. In SoftDent, click the **Help** menu.



2. Click **Launch Virtual Agent**.



3. Ask Cassidy a question.

