

OL700-03

WinOMS, a Sensei product

**Technician's Installation Guide – MSSQL
Versions**

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

WinOMS 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 WinOMS in a limited number of environments. WinOMS 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 WinOMS 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 WinOMS 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 WinOMS data and all necessary files for WinOMS. Since there are many types of backup programs, WinOMS support does not train offices on configuring the backup system or restoring a database. If an office must send data to WinOMS 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 WinOMS 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.

WinOMS 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 oralsurgerysupport@csdental.com or call support at 800.275.4637.

System Requirements, Installation and Configuration

Before installing WinOMS or migrating the data, review the following items in the [Resource Library \(gosensei.com\)](http://gosensei.com):

- **System Requirements** – Review before proceeding to ensure the hardware meets or exceeds the current requirements.
 - [Locally Hosted or Shared Server System Requirements Version 10.0](#)
 - [WinOMS Cloud System Requirements Version 10.0](#)
- **Configuration Guide** – Review the current configuration recommendations for WinOMS.
- **Technical Installation Guide** – Follow the steps to perform an upgrade or new installation.

Self-Installation Recommendations – Downloading the WinOMS v10 or Higher Installer Files

The WinOMS Installer version 10.0 is available for download via the **Dental Practice Management Software Download Service**.

1. On the server, go to softwaredownload.cs dental.com. The **Dental Practice Management Software Download Service** login window is displayed.
2. Enter the **Customer ID** and **Zip Code**. Your Customer ID is between 6 and 10 digits long and is located on the Support Schedules, Annual Contract Renewals, and any Invoice.
3. Click **Submit**. The installer file downloads are displayed, along with instructions.
Note: Server computers need both the **WinOMS update** and **SQL files**. Workstation computers need only the **WinOMS update file**.
4. For each file, 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**.
5. Follow the procedures in this document to install or update WinOMS.

STOP! Before you proceed, verify any 3rd party vendors used by the office are compatible with the version of the DPMS software downloaded. It is the office's responsibility to check with any 3rd party Application/Software companies to ensure that it is compatible with the new version of DPMS/SQL software being installed. Carestream Dental is not responsible for incompatibility issues with 3rd party vendors.

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 **WinOMSCS** folder on the data server. This location may vary if the office is using **Carestream Dental Oral 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 – **PWSvr**

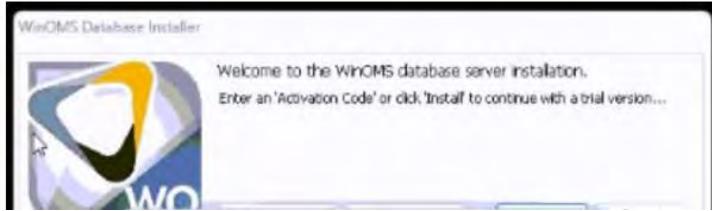
When a prompt to install the license file is displayed while installing or opening WinOMS, do the following:

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

SQL License File Activation

When installing the **SQLServer 3.1.11.exe**, a message may be displayed stating **Enter an Activation Code or Install to continue with a trial version.**

- When this message is displayed, the **Install** button is greyed out. Enter the activation code to proceed.
- If **SQL 3.1.11** was activated prior to the migration, a message is displayed stating **Click install to continue**, the installer is pulling the SQL edition from the license file and will not install the trial (express) version.



Registering the Software

When a prompt to register the software is displayed while installing or opening WinOMS, 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.
3. After the registration code is obtained, the **Installation Complete** window is displayed.
4. 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:
 - o Call 800.275.4637.
 - o Email oralsurgerysupport@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 and Restore Recommendations

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

The WinOMS practice is responsible for maintaining backups of the WinOMS data. We recommended backing up the entire **WinOMSCS** folder daily to ensure the database and all other items pertinent to running WinOMS are backed up. Work with your hardware vendor to create and maintain a backup routine that is specific to your practice.

On-premises WinOMS data is stored on the server in the following folder:

- **(ServerDataDrive):\WinOMSCS\Data**

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.

Configuring the Backup for WinOMS v10 and Higher - SQL

Important: MSSQL backup and database maintenance plans are not services provided by WinOMS support. We recommend stopping SQL services prior to making a backup. WinOMS does not support live backups as it can interfere with auto-lock features of the software. Support does not provide the database password. Backups should be performed by a System Administrator.

The **MSSQL** data files are:

- **mdsdb.mdf**
- **mdsb_log.ldf**

WinOMS v10.0 includes a command line process to facilitate backing up the Microsoft SQL database through the **CSToolkit**. All users must be logged out of WinOMS before executing the backup process. The backup file (**mdsdb.bak**) is created in a dated and timed subdirectory of

the backup location, **c:\temp** by default, unless another location is specified in the command line. The naming convention for the directory is *MM-DD-YYYY-HH-MM-SS*.

Example: The command **cstoolkit/backup c:\backupfolder** initiated on *January 1, 2024, at 1:30 PM* would generate a file named **C:/backupfolder/01-01-2024-13-30-00/mdsdb.bak**. This process will restart the database service after the backup is created.

To back up the v10 database from the Windows command line:

1. Open the **Command Prompt** from the Windows **Start** menu.
2. Navigate to the directory containing the **WinOMS installation**.
 - o WinOMS is usually installed at **C:\WinOMSCS** or **D:\WinOMSCS**.
3. Enter **cstoolkit/backup** to initiate the backup to the default directory, **c:\temp**.
 - o To specify a different location, add the desired directory to the end of the command. **Example:** The command **cstoolkit/backup d:\data\WOMSbak** will store the backup files in the **d:\Data\WOMSbak** directory.
 - o The first parameter is the backup command. The second parameter is the path to place the backup files.

Note: Do NOT include double spacing or quotes on the path even if there is a space.

The backup process creates a log file, **backup.log**, in either the default or specified backup location. The log file contains details of the backup process.

Examples of successful backup notes in the log file:

- Processed 52888 pages for database 'mdsdb', file 'mdsdb' on file 1.
- Processed 2 pages for database 'mdsdb', file 'mdsdb_log' on file 1.
- BACKUP DATABASE successfully processed 52890 pages in 4.611 seconds (89.610 MB/sec).

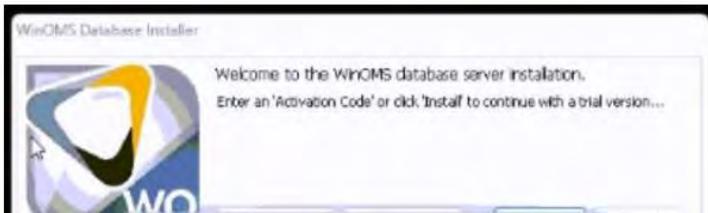
Warning: This process creates a **.bak** file which can technically be used to restore the SQL data using the SQL Server Management Studio (SSMS) to view or query the data. However, this type of restore would not allow users to log in WinOMS. Nor would it allow future updates to install when a newer version of the software is released. We do not recommend this type of restore. Should the office need to restore data, please contact support for assistance.

SQL License File Activation

When running the **SQLServer 3.1.11.exe**, a message may be displayed stating **Enter an Activation Code or click Install to continue with a trial version**.

- When this message is displayed the **Install** button is greyed out.
 - o Enter the activation code and click **Install** to proceed.
- If the **Click install to continue** message is displayed, the installer is pulling the SQL edition from the license file, and it will not install the **trial (express) version**.
 - o Click **Install** to proceed.

Note: Some clients update their SQL license prior to the migration being performed. After the **SQL Server** is activated, you can proceed with the WinOMS update.



Installation Recommendations

Important: Before installing or updating WinOMS, we recommend you back up any important data and the entire Sybase **WinOMSCS** folder on the server which includes the data files.

- Purchase only fully tested devices listed in the [System Requirements](#).
 - While some non-recommended hardware performs acceptably with WinOMS, 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 WinOMS, send an inquiry to Cassidy virtual agent or refer to the system requirements online.
- Review the enhancement features for the new version in the **Release Notes** and **What's New** section of the **Online Help Guide** in the [Resource Library](#).
- WinOMS v10 requires an **MSSQL** license before installation. If the office does not have an **MSSQL** license, contact our sales department at dpm sales.us@cs dental.com.
- If the office already has already has a full copy of SQL Server 2019 (Standard License), they will need their Microsoft SQL activation code during the install.
- Make sure there are no pending Windows Updates and that all have been completed.
- When replacing the server, make sure the workstations can browse via UNC path to the new server.
 - Any password prompts must be turned off or server credentials must be entered to allow the workstations to connect to the server.
- The **WinOMSCS** folder must be shared with full control permissions and file security must be set for **Everyone** with **Full Control**.
- Set sharing and security permissions on the new data folder to **Full Control for Everyone** with full read and write permission. Do the same for **Domain users** and **Authenticated Users** groups, if used.
- If possible, keep the new server name and IP address the same as the old server.
- Set the screen resolution to **1280x1024** or higher to properly display information in WinOMS. If using the **Electronic Medical Records (EMR)** feature, the recommended resolution is **1440x900**.
- Configure the hardware and software firewall to open the following ports internally:
 - For offices using **MSSQL**, open the **1434**, **1435**, and **1436** ports. Also the **SQLserver.exe** can be added to the firewall as an exception.
- For remote WinOMS login, a firewall exception is required for:
 - mdcs.exe** - File location root of the **WinOMSCS** folder
 - SQLserver.exe** - File location where SQL server 2019 defaults to

- The update process updates existing files, adds new files, and removes outdated WinOMS files on the server. The update always requires for the SQLMDS services running.
- A server **installation** creates and installs the database engine that runs the database and the server portion of the practice management software that connects to the database.
- WinOMS updates must be installed on the server before the update is run on each workstation in the network. Workstation updates can be run simultaneously. When a workstation is updated, a user can log into WinOMS if needed while other workstations are being updated.

WinOMS v9 to v10 Conversion – On-Premises & Hosted

Important: The WinOMS v10 update converts the database from a Sybase platform to a MSSQL platform and requires an MSSQL license in addition to the WinOMS application. The update may be required to use some third-party applications that are only compatible with v10.

On-Premises WinOMS v9.x to v10 Database Conversion

Important: Do the following steps before performing the WinOMS v9 to v10 conversion.

- Review the current [System Requirements](#) to ensure the hardware and third-party applications used in the office are compatible with WinOMS v10.
- Review the [Database Size Requirements for MSSQL](#).
- Review the **Installation Guide** in the [Resource Library](#) for details to configure a database migration.
- Follow the steps in the [WinOMS Version 10.x MSSQL Instructions](#) section to install v10.
- Review the [List of Third Party Services Compatible with Version 10.x](#) section of this document to ensure third party services the office is currently using or recently enrolled in will work WinOMS v10. If the service does not work with WinOMS v10, that service will not work after the update. An alternate compatible service should be considered before updating.

Resetting User Passwords After Updating to v10.x

Important: After converting to WinOMS v10.0, on-premises WinOMS users must reset their passwords. During the upgrade, you are prompted to set the **Admin Password**. This temporary password **must** be given to the administrator. The [admin user](#) must follow these instructions to launch the **Restore User Access** utility to initiate process of resetting all users' passwords and restoring their WinOMS access.

To reset user passwords:

1. Log in as the [admin user](#), using the temporary password set during the upgrade. The **Restore User Access** utility is launched automatically, displaying a list of all active users.
2. Verify the active users in the list. Use the filters and checkboxes to adjust the list as needed.
3. Ensure the **Active Users** filter is selected and click **Select All**. The list is highlighted.

4. Select **Reset Password**. A confirmation message is displayed: *You have selected xx out of xx total users. Are you sure you would like to reset the passwords for the selected users?*
5. Click **Yes**. A **Process Complete** message is displayed, verifying the reset to the temporary password.
6. Provide all users with the temporary password. When they log into WinOMS, they will receive a prompt to reset their password.

Hosted WinOMS v9.x to v10 Conversion and Update

- All WinOMS Hosted conversions and updates are performed by the Carestream Dental Cloud team. These updates are scheduled on weekends. Check with support to ensure any Carestream Dental third-party partner services the office is currently using is compatible in v10.
- Obtain three (3) optional weekends preferred by the client and contact support for assistance with scheduling the appointment. The office will not be able to use WinOMS during the update and conversion process. Prior to scheduling an appointment, review the current System Requirements to ensure the hardware and third-party applications used in the office are compatible with WinOMS v10.

WinOMS v10 Database Size Requirements for MSSQL

If the database is 7.5 GB or smaller, the customer can be assigned a license for **Microsoft SQL 2019 Express**. Once the database increases to 8.5 GB or larger, the customer will be prompted to reach out to the sales team to upgrade to **Microsoft SQL 2019 Standard**. If the database is 10 GB or larger, **Microsoft SQL 2019 Standard** is required.

Determine the current WinOMS database size. Ensure the available free hard drive space on the server is at least 3x the size of the database.

Important: We recommend contacting our sales team at dpmsales.us@csdental.com to purchase the appropriate **Microsoft SQL 2019** license before converting to WinOMS v10.

How Long Is the SQL Database Conversion for WinOMS v10

The time needed for converting the WinOMS database from Sybase to SQL is approximately 1 hour per 10 GB of database size. **Example:** If the database is 40 GB, the conversion should take approximately 4 hours. This time estimate is for the database conversion and server update portion of the process only. It does not include the time needed to update the workstations. SQL is installed automatically on the workstations as part of the update process. A separate SQL installation is not required on the workstations, whereas the server installation requires both the SQL and WinOMS update files to be downloaded and installed. See the Installer Files section for steps on downloading the installation files.

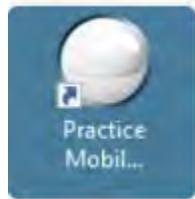
WinOMS Version 10.x Migration Pre-Checklist

Important: Before starting the conversion WinOMS v10, its recommend you back up any important data and the entire **WinOMSCS** folder on the server which includes the Sybase data files **mdsdb.db** and **mdsdb.log**.

1. Verify there is enough space on the machine to perform the update process (3 to 4 times the database size is recommended).
2. Disable **Real-Time AV**.
3. Disable **Real-Time Backups**.
4. Disable **Firewalls**, including **Windows Defender** and **Webroot**.
5. Verify all users are logged out of WinOMS.
6. Log into the server as the **Admin**.
7. Do not use RDP to run any update. You must be physically connected to the server.
8. Confirm the operating systems on the computers in the office are supported operating systems.
9. Confirm the network speed is adequate.
10. Ensure **Domain Controller** (if exists) is turned off or removed.
11. If performing a migration to a new server, make sure the old WinOMS server is not on the same network as the new server. Ensure the **Sybase SQLMDS** service is disabled and the **pwlicense** key is not running in system tray of the old server.

Note: Steps 12 through 15 are only applicable if **Pearl** is installed on the server and if the services are running.

- o If **Pearl** is installed, the **Pearl Mobile** icon will be on the server desktop.



12. If the services are running disable the **Pearl** services to proceed with the update.

- i. Click **Start**.
- ii. Click **Settings**.
- iii. Click **Control Panel**.
- iv. Click **Administrative Tools**.
- v. Click **Services**.

13. Verify the following services are installed:

- o **PracticeWorks Pearl Adapter Host**
- o **Carestream Application Server**
- o **MTM Mobile for PracticeWorks**

Note: Stop the services in the order listed above. To stop the services, right-click on the service name and click **Stop**.

- o **Remember to restart the services after the WinOMS update is complete.**

14. Restart the services in the reverse order as follows:

- o **MTM Mobile for PracticeWorks**
- o **Carestream Application Server**

- **PracticeWorks Pearl Adapter Host**

15. Test the **Pearl** connection.
 - i. Launch **Practice Mobile Admin** from the desktop.
 - ii. Select the **Services** tab.
 - iii. Click **Test Connection**. The connection response for both the **Cloud** and **Data Adapter** should be **OK Connectivity**.

Installing on a New Server Migration - v10.x

This section includes updating the database from v9 to the new v10 WinOMS database platform on a new server. All users must be logged out of WinOMS before beginning this process. Instructions to migrate need to be followed in the order of the steps listed below.

Updating the Database from v9 to v10

1. **Important:** A new OR current server MUST have an existing working copy of WinOMS v9 before starting this process to convert to v10. Open **Sybase Central** on the server, the half gold wheel on the desktop or under **Windows Services** and verify the **SQLMDS** service is running. Make sure a copy of the Sybase database file **mdsdb.db** and **mdsdb.log** is created before starting the migration.

Note: If updating WinOMS on a new server from v9 to v10, pull a copy of the **Technical Installation Guide – Sybase Versions** from the Resource Library. Follow the steps in the **Installing on a New Server – v9.x** and **Migrating the Data for Sybase Versions Only** sections to migrate the Sybase data to the new server first before installing MSSQL and the v10 update.

2. Confirm the number of databases to be updated using one of the following methods.
 - On the old server, open **Parameters** in **Sybase Central**.
 - Verify the databases in the **ODBC** settings. If multiple databases exist, the databases will be labeled *mdsdb* and *mdsdb1*.
3. If there are multiple databases showing in the **Parameters** in **Sybase Central**, contact support for assistance for updating each database to v10.
4. Verify **Microsoft .NET 3.5 Framework** is installed.
Note: This information is in **Server Manager > Features**. A server reboot is required after enabling **.NET**.
5. Shut down all workstations in the network and close all programs on the server. All users must be logged out of WinOMS.
6. Navigate to the folder where the Installer Files are saved.
7. Right-click the **SQLServerCD 1.4.ISO** file and select **Run as administrator**. A prompt is displayed confirming this install is on the server.
8. Click **Yes**. The **WinOMS Database Installer** window is displayed.
9. If an **Activation Code** or **License** is needed, a prompt is displayed to enter the required code or license. Use the proper button and follow the prompts.
10. Click **Install**. The SQL Server 2019 database is installed on the server. When the installation is finished, a prompt is displayed to restart the computer.
11. Restart the computer.

Note: If needed, configure the **Firewall** to open the **1434**, **1435**, and **1436** ports.

12. After the SQL Server installation is complete and the computer has been restarted, navigate to the folder where the [Installer Files](#) are saved.

13. Right-click the **WinOMS(version_number).exe** and select **Run as administrator**.

Note: The installer checks the computer for the **Microsoft .NET Framework 3.5 Service Pack 1 (SP1)**.

- If the files are present, the installation proceeds as usual.
- If the files are not present, the installation of SP1 proceeds automatically. After SP1 is installed, a prompt to restart the computer is displayed. If the WinOMS installation does not continue after the restart, repeat step 4.

The installation files are extracted, and the **Select Component** window is displayed. By default, **Server Side – Update** is selected.

14. Click **Next**. The **Server Database to Convert** window is displayed.

15. Either accept the defaults on the window, or do one of the following actions:

- To change the **Server Database** drive, select a drive from the drop-down list.
- To change the **Directory**, click the ellipsis and browse to the directory.
- To change the **Service Name**, edit the field to match the name of the local database service.

The **Automatic Administrator Log-in Settings** window is displayed.

16. Select **Use Automatic Administrator Log-in**.

Note: If you do not want to take advantage of the **Automatic Administrator Log-in** feature, users must manually log into the server to run WinOMS. The **Username** field defaults to the Windows login name used to log into the server. Enter the corresponding Windows login password. The user must have administrator privileges.

17. Click **Next**.

Important: Enter the username and password for the [WinOMS admin user](#). Follow the steps in the [Resetting User Passwords](#) section to reset passwords and restore access to all active WinOMS users.

18. Click **Next**. The **SQL Server Setup** window is displayed, and the software is installed.

19. When prompted, restart the machine.

20. Click **Finish**. The **Status of CS WinOMS 10.x Server Update** window is displayed.

- When upgrading to the next major release, such as from 9.x to 10.x, the **Release Code** window is displayed after the status window. Follow the steps in the [Registering the Software](#) section to register the software.

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.

The **Status of CS WinOMS 10.0 Server Update** window is displayed again, showing the progress of the installation. Upon completion, a message is displayed stating the server installation is complete.

21. Click **OK**.

22. Click **Exit**.

23. You can now update the workstations.

Installing on a Workstation – v10.x

1. Verify the **SQL** service is running under **Windows Services**.
2. Navigate to the folder where the [**Installer Files**](#) are saved.
3. Right-click **WinOMS(version_number).exe** and select **Run as administrator**. A prompt is displayed confirming you want to proceed with the install.
4. Click **Yes**. The **Select Component** window is displayed.
- o The installer checks the computer for **Microsoft .NET Framework 3.5 Service Pack 1 (SP1)**.
 - o If the files are present, the installation proceeds as usual.
 - o If the files are not present, the installation of **SP1** proceeds automatically. After **SP1** is installed, a prompt to restart the computer is displayed. Restart the computer. If the installation does not continue after the restart, repeat step 3.
5. Select **Client Side** and the option stating **I understand that the client side of CS WinOMS v10.0 only runs on Windows 8.1 and Windows 10**.
6. Click **Next**. The **Target Directory** window is displayed.
 - o The target directory is the location where the update should be installed. The default target directory is **C:\WinOMSCS**.
 - o If the default target directory is incorrect, edit the path. For the **Server** directory, click **Scan**. The installer finds and enters the server directory accessed by the client. Or click the ellipsis to browse to and select the directory folder.
7. Click **Next**. The **WinOMS Version 10.0 Installation** window is displayed.
8. Click **Finish**. The **Status Messages** window is displayed indicating the progress of the installation. When the installation is complete, a prompt to restart the computer is displayed.
9. Click **Yes** to restart the computer. After the installation is complete, the **WinOMS** icon is displayed on the desktop.
10. Repeat the steps to install WinOMS on each computer in the network.
11. Confirm one or more users are able to login the software successfully.

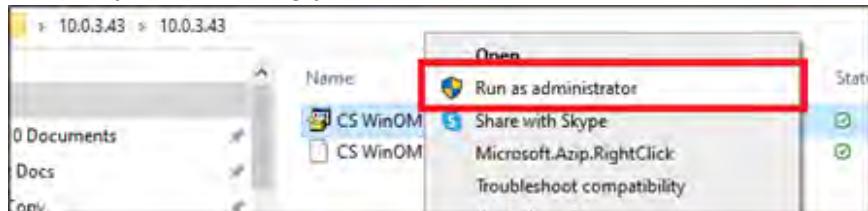
Updating the Server – v10.x to v10

The following instructions provide steps for installing a **Server Side – Update** *where the server is currently running v10*. **Example:** Updating from v10 to v10.0.3. These instructions are not intended for a server migration or new server installation of v10.

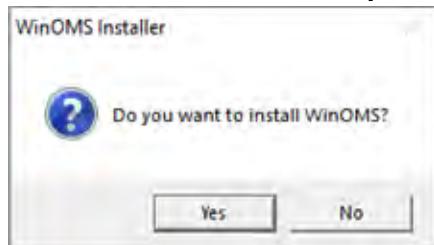
To update the server:

1. Shut down all workstations in the network and close all programs on the server. All users must be logged out of WinOMS.
2. Ensure the **MSSQL service** is running.
3. Ensure the **WinOMSCS** folder on the server is a shared folder with full read and write permissions.
 - o Navigate to the **WinOMSCS** folder on the server.
 - o Share the folder with full read and write permissions.
4. Navigate to the folder where the [**Installer Files**](#) are saved.

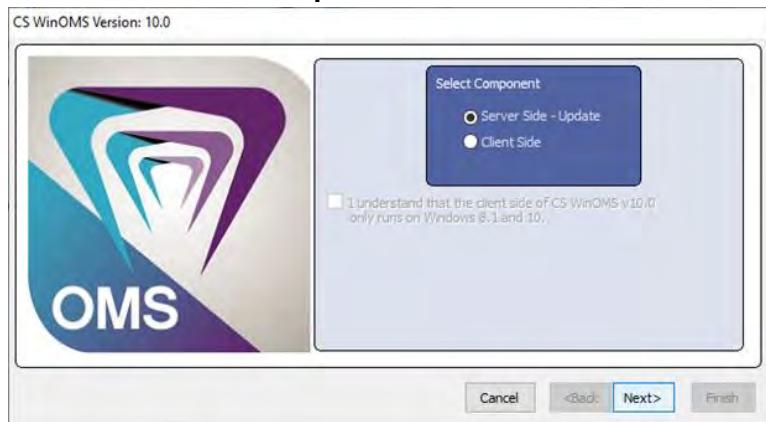
5. Right-click **WinOMS(version_number).exe** and select **Run as administrator**. A prompt is displayed confirming you want to proceed with the install.



6. Click **Yes**. The **Select Component** window is displayed.



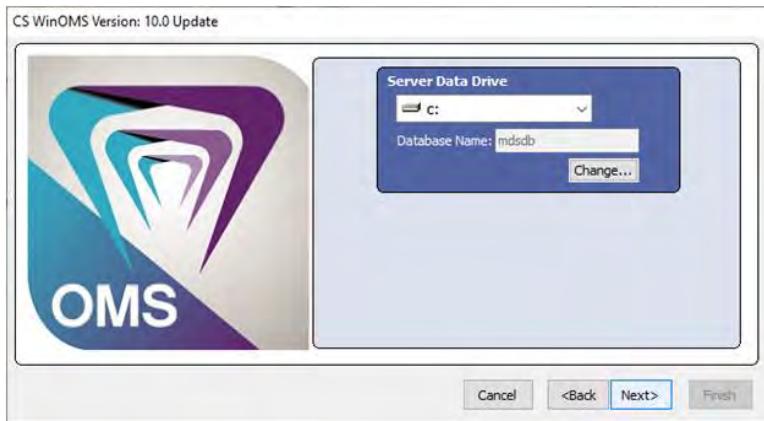
7. Select **Server Side – Update**.



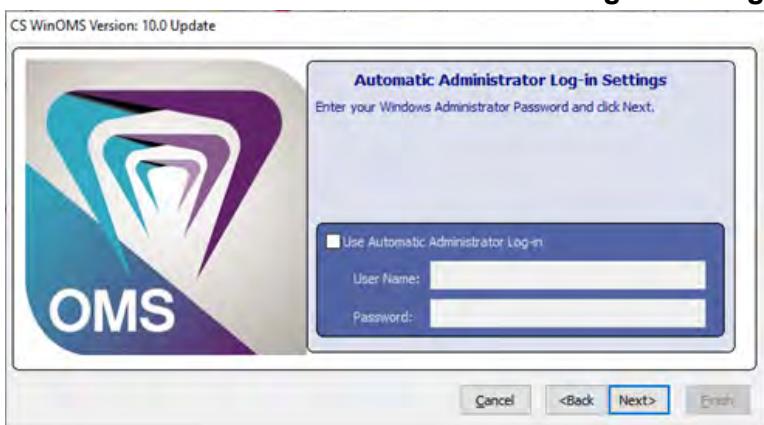
8. Click **Next**. The default in the **Server Data Drive** field is the **C** drive. If data is located on a different drive, select the drive from the drop-down list.

- o (This step only applies to dual database setups.) If the office has a dual database setup, after updating the first dataset, run the update a second time. Click **Change**. Edit the **Database Name** and **Server Data Drive** to update the second dataset. Click **Next**.

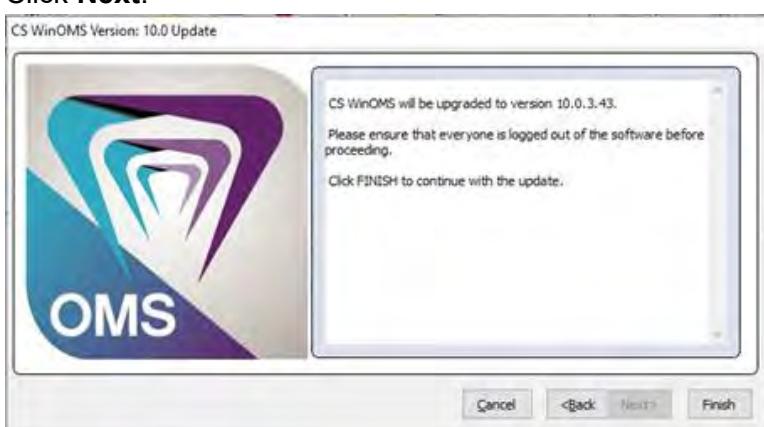
Example: Add the number 2 at the end of the name of the second database, **mdsdb2**, and change the drive to update the contents in the **Data2** folder.



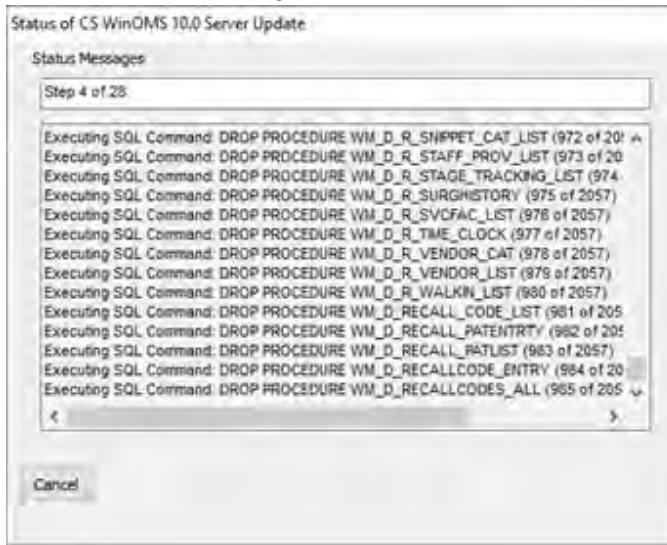
9. Click **Next**. The **Automatic Administrator Log-In Settings** screen is displayed.



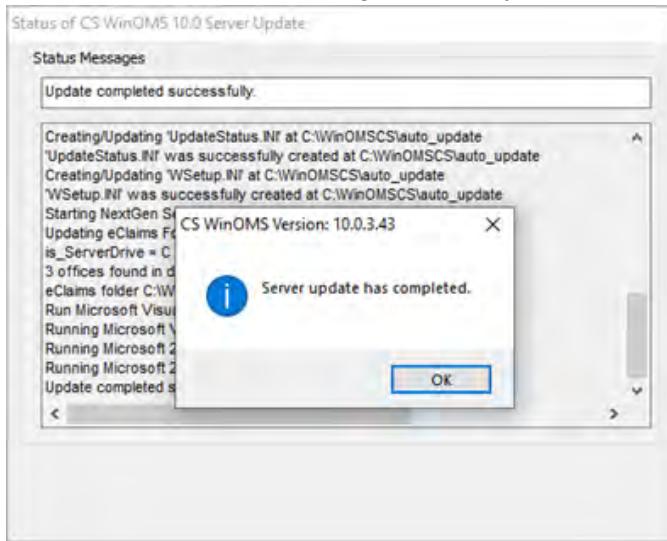
10. Select **Use Automatic Administrator Log-in**.
11. Type the administrator credentials in the **User Name** and **Password** fields.
12. Click **Next**.



13. Click **Finish**. The update initializes. The **SQL services** are stopped and started to create a backup. The update proceeds after doing several checks and runs through the steps. Some steps take longer than others.



14. Let the update run. The **Status Messages** window is displayed indicating the progress of the installation. A message is displayed when the installation is complete.



15. Click **OK**.

16. The workstations can now be updated.

Updating Workstations – v10.x

Note: The update can be run on workstations simultaneously.

The following instructions provide steps for installing a **Client Side** update where the workstation is currently running v10. **Example:** Updating from v10.0.1 to v10.0.5.

1. Log into **WinOMS** on the workstation. A prompt is displayed stating it has *detected a new version of the software and asks if you want to update now.*
2. Click **Yes** to proceed with the update.

Third Party Products

WinOMS 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, see the [System Requirements](#).

List of Third Party Services Compatible with Version 10.x

For an updated listing of third party authorized Carestream Dental partners and their contact information, visit the [Authorized Partners](#) page on our website.

The following list identifies the Carestream Dental authorized partners that offer services that work with WinOMS v10.x.

Note: This information is subject to change.

Current Partner List	Works in WinOMS v9	Works in WinOMS v10
Care Credit	Yes	Yes
Demandforce	Yes	No
Doctible (Patient Manager)	Yes	Yes
Global Payments Integrated	Yes	Yes
Intiveo	No	Yes
iCoreConnect	No	Yes
Lighthouse	Yes	No
MMG Fusion	Yes	Yes
MTM (Pearl)	Yes	Yes (on Prem only)
NEA Fast Attach	Yes	Yes
OMS3-Practice Metrix	Yes	Yes
PBHS	Yes	Yes
Rooster Grin	No	Yes
SolutionReach	Yes	No
TekCollect	No	No
Weave	No	Yes
WUWTA	No	Yes
Zimbis	No	Yes
Not previously available in WinOMS:		
Gadge	No	No
Intrado West (Televox)	No	No
Opera DDS	No	No
RevenueWell/PBHS	Yes	Yes
RR Donnelley	Yes	Yes
Sesame	No	No
SysIT Services	Yes	Yes

Note: MTM (PEARL) v9 and v10 are on-premises only.

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-WinOMS>

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.

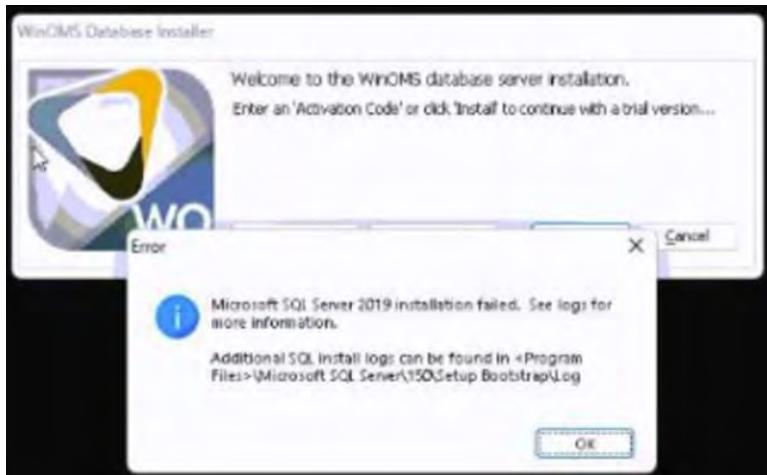
Installation Troubleshooting – WinOMS SQL v10.x

Microsoft SQL Server 2019 Installation Failed. See Logs for more Information

This section lists where to locate the log files for more information when the Microsoft SQL installation or WinOMS update fails.

The information in the log files will help with troubleshooting failed updates. If migrating a database from Sybase to SQL Server, log files can be pulled.

The actual log file location of the SQL install file referenced in the screenshot below is in **c:\programdata\Carestream\WinOMS\logs**.



Additional log files: These documents will be useful if the issue needs escalating to support for a resolution. Depending on what step the migration is in, certain log files are present to assist with troubleshooting. Please review the full log file. Provide the information to support if requested.

SQL Installation Failures:

- **SQLinstall.log** – C:\ProgramData\Carestream\WinOMS\logs

Conversion Errors:

- **convLog_mdsdb.log** – Database Migration tool, reads the database schema. Root of the **WinOMSCS** folder on server.

The following locations may also help:

- **Current Directory:**
 - C:\Users\ADMINI~1.xxx\AppData\Local\Temp\7zS4F8D9A30\MSSQL\SQLLines_Data
- **Configuration Files:**
 - C:\USERS\ADMINI~1.xxx\APPDATA\LOCAL\TEMP\7ZS4F8D9A30\MSSQL\SQL Lines_Data\SQLDATA.cfg
 - **convLog_mdsdb_failed.txt** – Same location as **convLog_mdsdb.log**.
 - **sqldata_ddl.SQL** – Root of **WinOMSCS** folder on server.
 - **sqldata_failed.SQL** – Root of **WinOMSCS** folder on server.

WinOMS Update Errors:

- **mdssetup.log** – Root of C drive
- **Mdserror.log** – Root of C drive

Note: Both log files are accessible in WinOMS v9 and v10.

Troubleshooting:

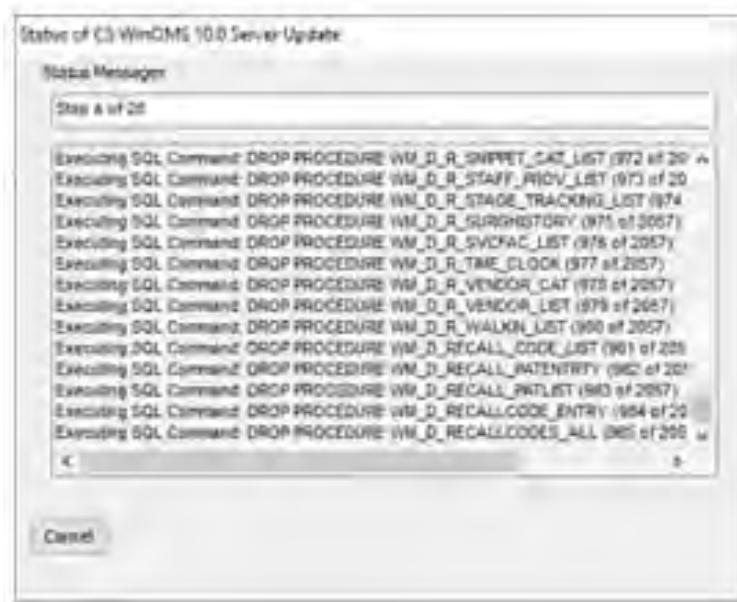
Check the log **SQLinstall.log** file to verify the install was completed.

- Check the **Summary** for any useful information.
- Verify configurations are correct.
- Verify there is not another instance of **WinOMS** in **MS SQL Server 2019**.
 - If another instance is present, do the following:
 - 1 Uninstall the older instance.
 - 2 Reinstall a new instance of **SQL**.
 - 3 Reboot the server.
 - 4 Check the **Control Panel** to ensure **MS SQL Server 2019** is installed.

If **MS SQL** displays as an *installed application*, proceed with running the WinOMS update. If the update continues to fail, contact WinOMS support for assistance.

WinOMS Freezes During the v10 Update on Step 4 of 28: Error - 99

The update runs through a 28-step process. Step 4 executes commands. If it is frozen, it will stop scrolling and not move for 15-20 minutes, if this happens, proceed with the following steps.



- 1 Click the **Cancel** button to end the update.
 - An **Error 99** message is displayed listing an **SQLSTATE** code.
- 2 Exit from update window.
- 3 Go to root of **C** and pull the **mdssetup.log** and **mdserror.log** files.
Note: These log files are accessible in v9 and v10.
- 4 Ensure all Windows updates are completed.
- 5 Follow steps in the [How to Rollback to Previous WinOMS Version from a Failed WinOMS Update - v9 to v10 and Higher](#) section to reset and reinstall the update.

- 6 Contact support and have the call escalated to research any data inconsistencies.

Application Error Base Key = HKEY_CURRENT_USERS\SOFTWARE\PRACTICEWORKS
No Server or Database name has been specified.

Issue: This error may be presented when logging into WinOMS after updating from v9 to v10 on some of the workstations. Other users were able to log in successfully.

Resolution: Modify the registry string values on the workstation.



1. Go to **Start > Run**.
2. Type **Regedit** and press **Enter** to access the **Windows Registry**.
3. Browse to and modify the following registry string values:

- Computer\HKEY_LOCAL_MACHINE\SOFTWARE\WOW64NODE\PRACTICEWORKS

STRING	MODIFY/ADD SET VALUE AS	
DATABASENAME	MDSDB	
SERVERNAME	SERVER\WINOMSCS	(Server = Server Name)
ServerDir	\SERVER\WINOMSCS\	(Server = Server Name)

Note: SERVERNAME does not require two backslashes in the beginning.

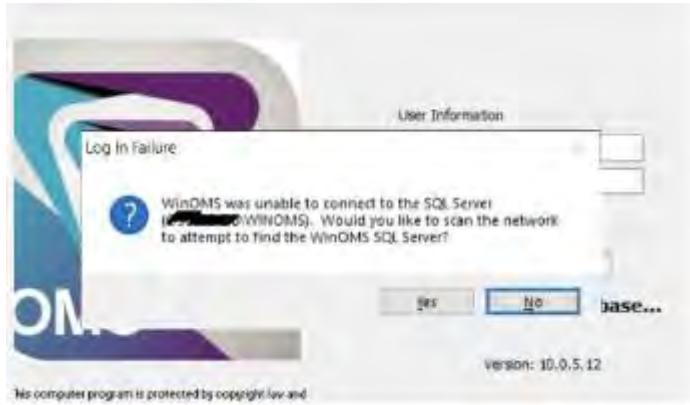
- Computer\HKEY_LOCAL_MACHINE\SOFTWARE\WOW64NODE\PWINC\WINOMSCS

STRING	MODIFY/ADD SET VALUE AS	
LocalExeDir	C:WINOMSCS	
ServerExeDir	\server\MDCSRegistered	(Server = SERVER NAME)

- Computer\HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\PWInc\WinOMSCS

STRING	MODIFY/ADD SET VALUE AS	
(Default)	(value not set)	
LocalExeDir	C:WINOMSCS	
ServerExeDir	C:winomscs\mdcs\registered	

4. Exit the **Registry**.
5. Log in WinOMS.



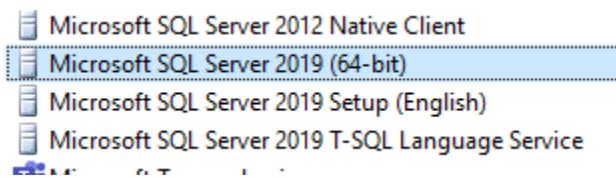
6. If you receive a **Log In Failure Unable to connect to the SQL Server** error message. Re-run WinOMS **Client Side** install as directed in the [Installing on a Workstation](#) section of this document.
7. Log into WinOMS.

How to Uninstall and Reinstall WinOMS SQL Instance

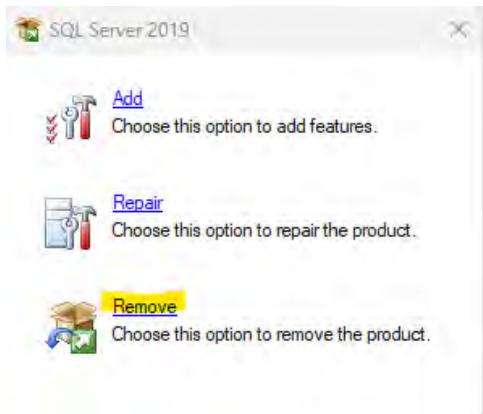
Uninstalling SQL:

- 1 Open the **Control Panel** and navigate to **Programs and Features**.
- 2 Look for **Microsoft SQL Server 2019 (64-bit)**.

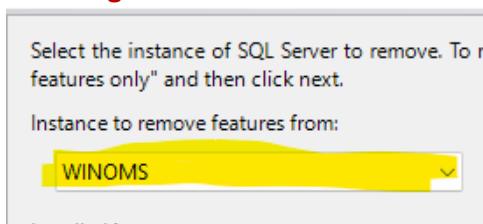
Warning: Do not delete any other instance of SQL aside from 2019. Ensure that instance of 2019 is for WinOMS only. If another app is using SQL 2019 product keys may conflict. Contact Support for assistance.



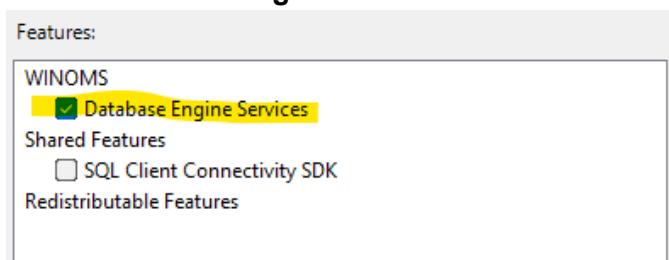
- 3 Right-click and select **Uninstall/Change**.
- 4 Click **Remove**.



- 5 Select **WinOMS** from the **Instance to remove features from** drop-down list.
Warning: DO NOT SELECT ANYTHING OTHER THAN WinOMS.



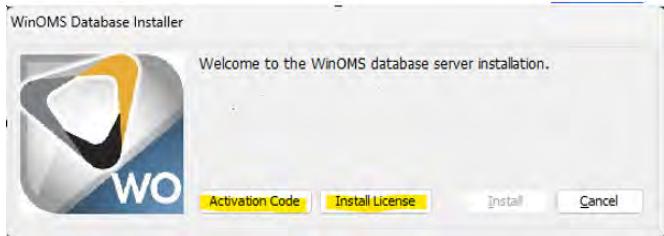
- 6 Click **Next**.
- 7 Select **Database Engine Services**.



- 8 Click **Remove**.
- 9 Click **Finish**.

Installing SQL:

- 1 Download the **SQLServer 3.1.11.exe** from softwaredownload.cs dental.com.
- 2 Right-click the **SQLServer 3.1.11.exe** and select **Run as administrator**.
- 3 Click **Yes**.
- 4 Click **Yes**.
- 5 Select one of the following:
 - o **Activation Code** to enter the SQL edition activation code.
 - o **Install License** to add a new license with the SQL edition included.



- 6 After entering the code or installing the license file, click **Install**.
- 7 After installation completes, reboot the server.

SQLSTATE Errors

When an update from WinOMS v9 to v10 fails, **SQLSTATE** errors provide detailed information about the cause of a warning or error and returns an **SQLSTATE 42xxxx syntax error or access OR database violation**. Review the error log files and perform basic troubleshooting:

- Check the **Control Panel**. Verify there is not another instance of **WinOMS in MS SQL Server 2019**. If more than one instance is present, do the following:
 1. Uninstall any instance of **WinOMS SQL**.
 2. Reinstall a new instance of SQL.
 3. Check the **Control Panel** to ensure **MS SQL Server 2019** is installed.
 4. Reboot the server and retry the update.
- Ensure the **SQLMDS service** is running before starting the WinOMS update.
- Reboot the server and retry the update.
- Review the [WinOMS Version 10.x Migration Pre-Checklist](#) to ensure programs are disabled.
- Review the log files and summaries to help with troubleshooting and perform any actions specified.

If troubleshooting does not resolve the issue, follow the steps in the [How to Rollback to Previous WinOMS Version from a Failed WinOMS Update - v9 to v10 and higher](#) section to rollback WinOMS to the previous version and restart the update.

If the issue is not resolved, contact support to escalate and have the issue reviewed. Specific details related to the SQL State error and log files must be analyzed per case.

100412 Unable to Update to v10

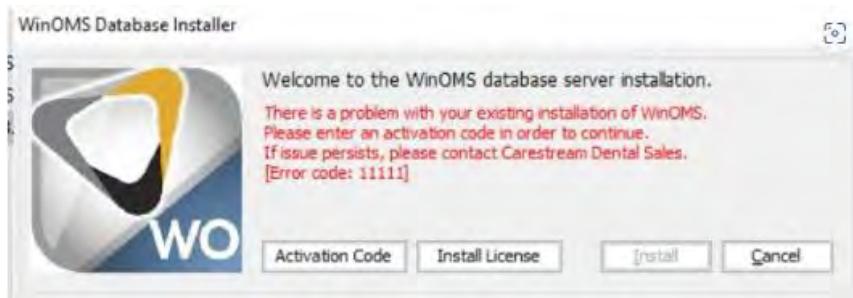
One of the following errors may be displayed during an on-premises update from WinOMS v9.6 to v10 after the SQL installation process and immediately before the conversion begins. Sybase stops and the Microsoft SQL service attempts to connect to the database but fails.

- **[-1] SQLSTATE = 28000**
- **Microsoft SQL Server Native Client 11.0**
- **Login failed for user 'sa'**

Troubleshooting Tips:

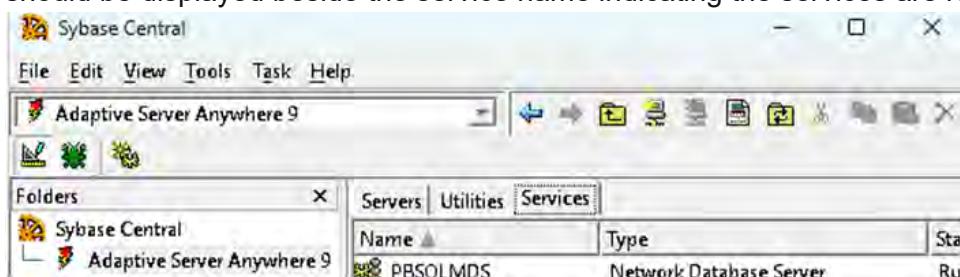
- 1 Capture a screenshot of the full error. Since the update did not begin there is no **mdssetup.log**. Pull the **SQLinstall.log** file from **C:\ProgramData\Carestream\WinOMS\logs** to determine whether the SQL install completed successfully.
- 2 Uninstall and reinstall the **SQLServer 3.1.11.exe**.
- 3 Reboot the server and try to restart the update.
- 4 If after completing the steps above, the update fails and is unable to proceed, escalate call to support to determine root cause.

Error code: 11111

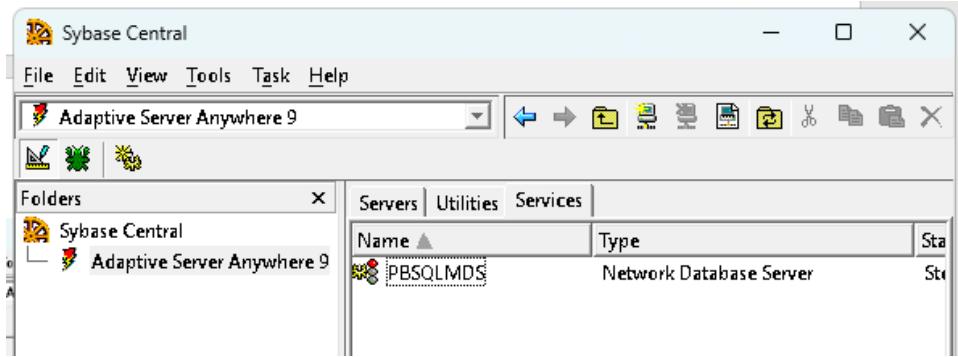


Resolution:

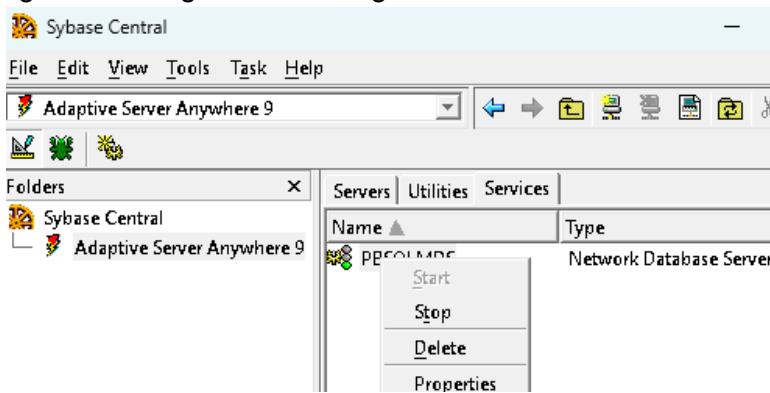
- 1 Double-click the **Sybase Central** icon  on the server desktop.
- 2 Click **Adaptive Server Anywhere 9**.
- 3 Click the **Services** tab in the right window pane. The **SQLMDS** service and a green light should be displayed beside the service name indicating the services are running.



- 4 Right-click on the service name, **SQLMDS**, and click **Stop**. The green light will change to a red light when the services are stopped.



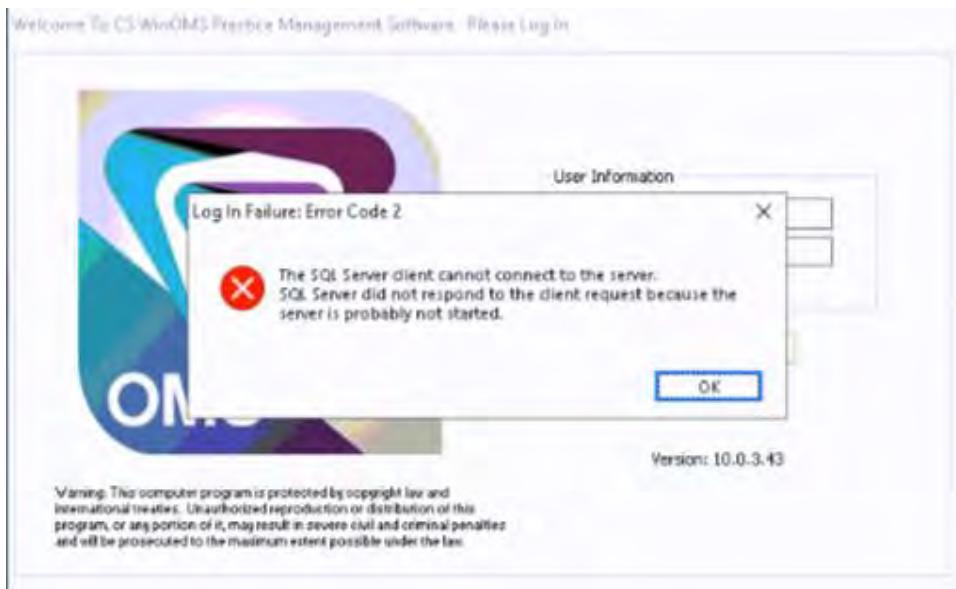
- 5 Right-click on the service name again and click **Start** to restart the Sybase service. The light will change from red to green.



- 6 Click the **Install** button in the **WinOMS Database Installer** window to proceed with the update.
Note: If the **Install** button is not enabled after performing these steps, check the **Control Panel** to ensure there is not an **SQL Instance (WinOMS)** installed. If so, uninstall and reinstall **SQL (WinOMS)** 2019 following the steps are in the [How to Uninstall and Reinstall WinOMS SQL Instance](#) section.
- 7 If the install button is still not enabled, contact support for assistance.

Login Failure: Error Code 2

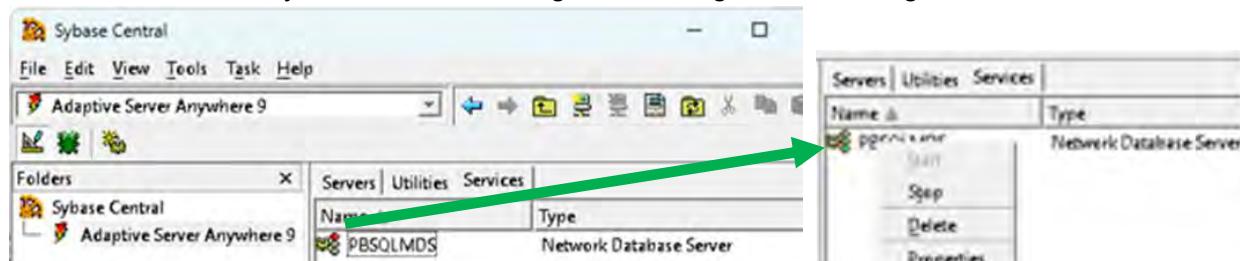
Issue: The prompt to update the workstation is not displayed when logging into WinOMS after updating from WinOMS v9 to v10 on the server. Instead, a **Login Failure** error is displayed. WinOMS will usually detect the new version automatically when updating from a version of WinOMS v10 to another version of 10.



Root Cause: The **SQL Server Client** cannot connect to the server. The Sybase server did not respond to the client request. The issue may be that the Sybase services are not running.

Resolution:

1. Open **Sybase Central** from the desktop of the server.
2. Verify the services are running.
3. If the light beside the service name is red, right-click the **Service Name** and click **Start** to restart the Sybase service. The light will change from red to green.



Resolution: If the update does not detect the new version automatically, run **Setup.exe** from the **Installer**.

Note: Beginning with version 9.7, the **WinOMS Installer** is available for download via the **Dental Practice Management Software Download Service**. The installation files for earlier versions of WinOMS were sent to the office either on a physical disk or uploaded to the **_CSInstaller** folder.

1. Navigate to the **v9 Installer** files:
 - o If the installer is a downloaded **ISO** file, right-click the file and click **Mount**. Right-click **Setup.exe** and select **Run as administrator**.

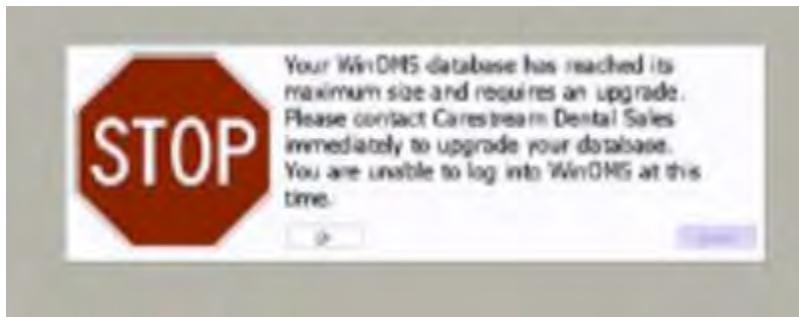
- If the installer is a WinOMS physical disk, put the disk in the disk drive. Follow instructions and run **Setup.exe**.
- If there is no disk, open the **WinOMS** folder on the server. Open the **Auto_Update** folder. Open the **_CSInstaller** folder. Click in the **Address** field. This will highlight the path. Right-click and copy the path. Right-click **This PC** on the left-side in **File Explore**, select **Map Network** drive. Paste the path in the **Folder** field. Click **Finish**. Right-click **Setup.exe** and select **Run as administrator**.

2 Follow the prompts for the installer and proceed with running the [**Client Side Install**](#).

WinOMS v10 not Recognizing the Enterprise Edition of SQL

Issue: A message is displayed stating the database is too large for the current version of SQL when logging into WinOMS.

Cause: This only happens in offices using **Microsoft SQL 2019 Express**. This message indicates the WinOMS database exceeds the [size requirements for Microsoft SQL 2019 Express](#).



Resolution:

- Call WinOMS support to have this issue resolved.

How to Rollback to Previous WinOMS Version from a Failed WinOMS Update - v9 to v10 and Higher

Steps for reverting the server side install back to v9 if the v10 conversion fails and all attempts to resolve the issue have been exhausted. **Rolling the software back to the previous version is a last resort option.**

Note: Make sure the installer files for the previous version are accessible. If needed, download the files to the server.

- 1 Type **Services** in search bar of the Windows **Start** menu on the server.
- 2 Locate and stop both **MSSQL** services labeled as **(WinOMS)**.
- 3 Double-click the **Sybase Central** icon on the server desktop.
- 4 Click **Adaptive Server Anywhere 9**.
- 5 Click the **Services** tab.
- 6 Right-click **Sybase Service**. Select **Stop**. The **SQLMDS** service will have a red light.

- 7 Go to **Start > Run**.
- 8 Type **Regedit** and press **Enter** to access the **Windows Registry**.
- 9 Browse to and rename the following registry string values:
 - a. \HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\PracticeWorks\
 - i. Rename the following items:
 - DATABASESERVER
 - DATABASENAME
 - ServerDir
 - SERVERNAME

Note: The recommended naming convention is to add **OLD_** at the beginning of the item name.
- b. \HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\PracticeWorks\CSInstaller
- 10 Exit the **Registry**.
- 11 Go to the WinOMS folder on the server, for example **D:\WinOMSCS**.
- 12 Rename the **MDCSRegistered** folder to **OLD_MDCSRegistered**.
- 13 Confirm the **File Version** is correct for their v9 database.
 - a. To confirm the version browse to the **WinOMS** folder on the server.
 1. In the **WinOMS** folder, open the **Auto_Update** folder.
 2. Scroll to the **WSETUP.ini** file.
 3. Right-click and select **Open** or **Edit in Notepad**. The **WinOMS** file version number is displayed.
 4. Confirm the version.
 5. Click **Close**.
- 14 Navigate to the **v9 Installer** files:
 - a. If the installer is a downloaded **ISO** file, right-click the file and click **Mount**. Right-click **Setup.exe** and select **Run as administrator**.
 - b. If the installer is a WinOMS physical disk, put the disk in the disk drive. Follow instructions and run **Setup.exe**.
 - c. If there is no disk, open the **WinOMS** folder on the server. Open the **Auto_Update** folder. Open the **_CSInstaller** folder. Click in the **Address** field. This will highlight the path. Right-click and copy the path. Right-click **This PC** on the left-side in **File Explore**, select **Map Network** drive. Paste the path in the **Folder** field. Click **Finish**. Right-click **Setup.exe** and select **Run as administrator**.
- 15 Select **Server Side – New Install**.
- 16 Complete **Server Side Install** as normal. After the install completes, proceed with the following steps.
- 17 Open to **Sybase Central**.
- 18 Confirm the **SQLMDS** service is running.
- 19 Navigate back to the folder where the **Installer** files are saved.
- 20 Run **Setup.exe** again.
- 21 Select **Client Side**. Complete as normal.

- 22 Log into **WinOMS**.
- 23 Go to **Help > About**.
- 24 Confirm the **Software** and **Database** versions match.

Directories To Configure on a New Computer – On-Premises Configurations

- The following are configuration settings to made on a new workstation or to all workstations when the server name has been changed after the has been migrated to a new server.
- These settings are for on-premises configurations only.
- The settings apply to all WinOMS MSSQL v10 and higher versions.

Server Directory – Tables > Practice > Practice Preferences > Miscellaneous

- Update the **Server Directory** to the **mdcs** folder on the new server, for example **\(newservername)\mdcs**.
- If this directory is incorrect, a common error, **Invalid Letter Directory**, can occur during mail merge.

Output Directory (Data Export) – Tables > Practice > Practice Preferences > Miscellaneous > Enable Data Export

- This option may not be selected which is an indication that the office may not use the **Data Export** features in the software.
- This feature is optional.
- To enable the feature, select **Enable Data Export** and verify the **Output Directory** reflects **\(newservername)\mdcs\Export**. If this path is incorrect, the feature will be disabled.

Image Directory – Utilities > My Computer Settings

- Set **Directory** to **\(newservername)\mdcs\Images**.
- Get the path from a working computer and not the server. If this path if incorrect the office will not be able to scan images, retrieve images or save attachments in WinOMS.

PWClient – C:\Windows\SysWOW64

- Update the **PracticeWorks Server Path**.
 - On the server the **Server Path** in **PWClient** should point to the letter directory.
 - On and workstations the **Server Path** in **PWClient** should point to the UAC path.
- If this path is not updated, the office may receive some of the following common license errors when logging in WinOMS:
 - Pwsrv.exe is not Installed Correctly
 - License server not found -1
 - Or a prompt to browse to license server

Data Directory – \\servername\mdcs\ICCPs

- This is the main path used for **ePayments**, **ePayments Secure** and **Payment Manager for conversion purposes**. – **Tables > Practice > Practice Preferences > Financial** – Update the **Data Directory** with updated path using the new server name.

Error Code 18456 Invalid Username or Password

This error occurs when a user is trying to log into the software using their WinOMS v9 credentials after WinOMS has been updated to v10. In v10.0 the password must be reset for all users. The old password will not work. Follow the steps in the [Resetting User Passwords After Updating to v10.x](#) section to change the password for all active users. Once the password has been reset to the default temporary password, customers should be able to log in with the current username and temporary password. They will be immediately prompted to create a **New Password**. If user is unable to login with the default temporary password, contact support for assistance.

Welcome To CS WinOMS Practice Management Software. Please Log In

