

exocad

Instruction Manual

dentalshare

Instruction Manual by exocad GmbH

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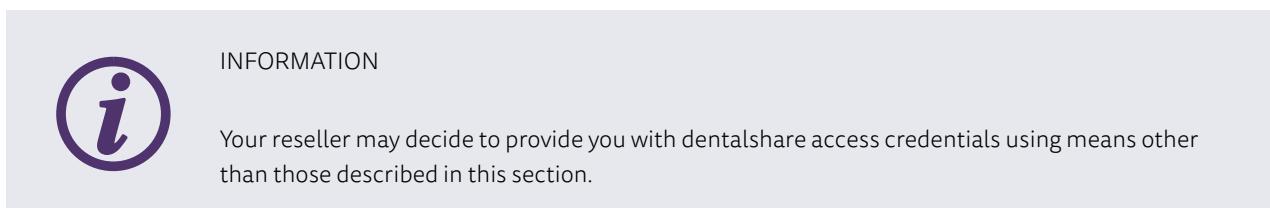
1 Introduction

dentalshare is exocad's software solution for transferring project data between different dentalshare users. dentalshare can be accessed via DentalDB (DENTALSHARE button in ACTIONS section). The dentalshare account can be managed via a webpage <https://secure.exocad.com/dentalshare/>.

dentalshare provides streamlined workflows that enable dental partners to collaborate more efficiently. The workflows (e.g. design and production workflows) are referred to as Services in dentalshare.

2 Preparations for Using dentalshare

2.1 Creating a dentalshare Account



To create a dentalshare account, follow these steps:

Step 1: Launch exocad DentalDB.

Step 2: Load an existing job.

Step 3: In the ACTIONS section, click the DENTALSHARE button (see Figure 2.1). This opens the DENTALSHARE UPLOAD window (see Figure 2.2).

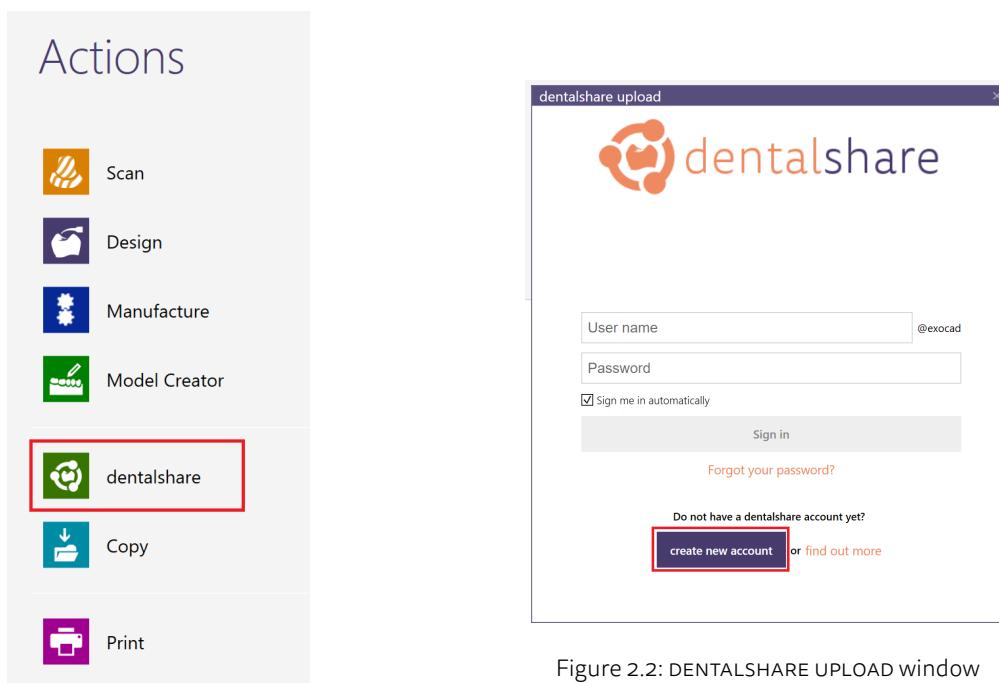


Figure 2.2: DENTALSHARE UPLOAD window

Figure 2.1: DENTALSHARE button in DentalDB

Step 4: Click CREATE NEW ACCOUNT. The registration form appears (see Figure 2.3). Enter the required information. Fields with a red frame are mandatory.

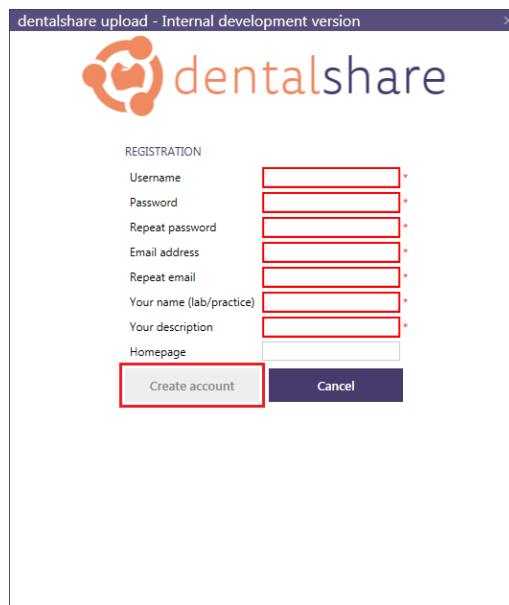


Figure 2.3: dentalshare registration form

Choose a username that does not contain blank spaces or special characters (?!_,&, ä, è, etc.). The password must have at least 6 characters.

Step 5: Click CREATE ACCOUNT. dentalshare automatically sends a confirmation email to the entered email address, containing a confirmation link and the login information (group, username, password).

Step 6: Click the link in the confirmation email. This opens the dentalshare login webpage (see Figure 2.4).

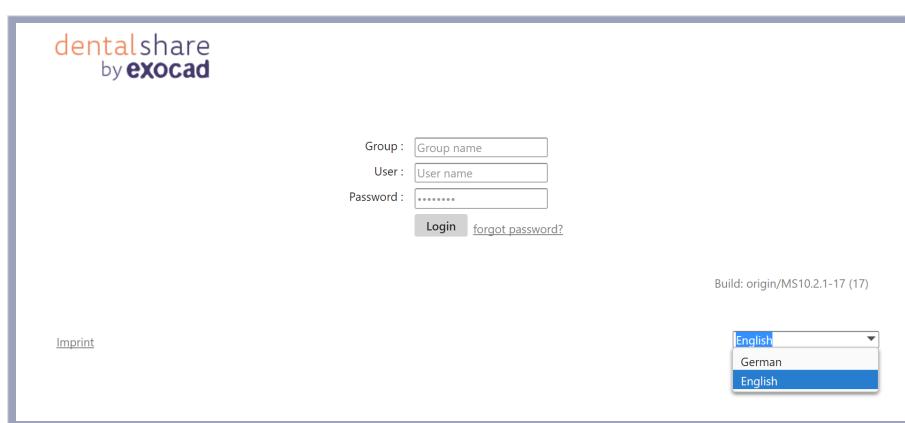


Figure 2.4: dentalshare registration webpage

Step 7: Enter your group, username, and password and select the page language (English/German) using the dropdown menu in the bottom right corner.

Step 8: Click LOGIN.

As soon as you have accepted the terms and conditions, you are logged into dentalshare and can see your account page. The account tabs and the information included is explained in Chapter 6.

2.2 Enabling the Automatic Data Import Function

To be able to receive data from partners, you must enable the data import function.

Step 1: Click SETTINGS... in the DentalDB OPTIONS section (available while no project is loaded). This opens the SETTINGS window (see Figure 2.5).

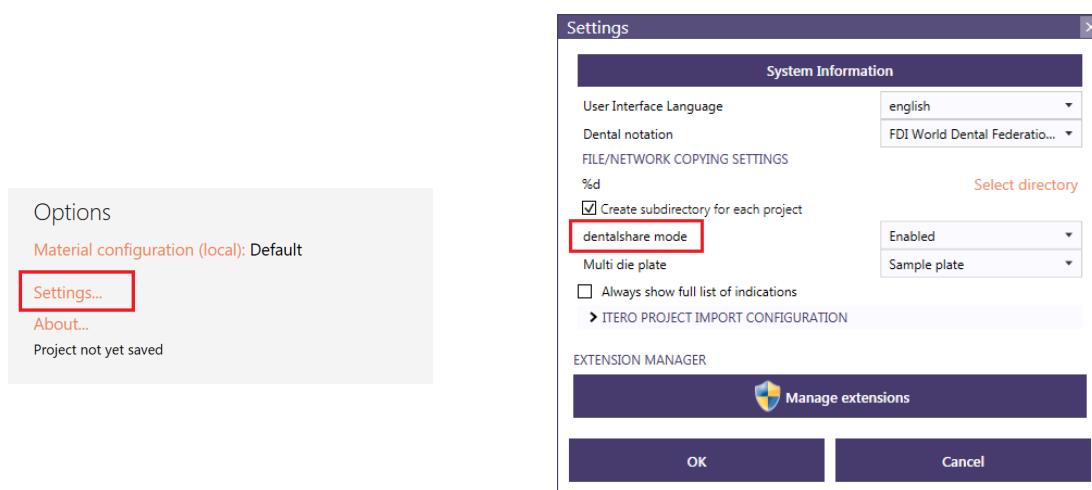


Figure 2.5: SETTINGS window

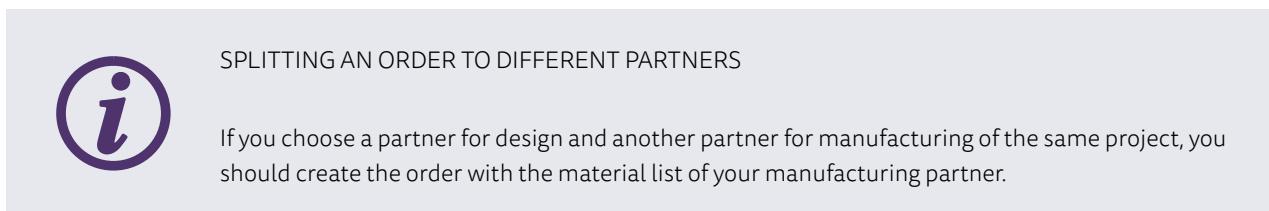
Step 2: Set the DENTALSHARE MODE to Enabled.

Step 3: Click OK.

3 Sending Data to a Partner

3.1 Selecting a Material List

If your partner uses their own material list for manufacturing, you can create the order with their material list. To be able to use the partner's material list, your partner must upload it to the dentalshare platform (see Chapter 6.4).



To create an order with your partner's material list, follow these steps:

Step 1: In the OPTIONS section of the DentalDB, click MATERIAL CONFIGURATION. This opens the MATERIAL CONFIGURATION SELECTION window (see Figure 3.1).

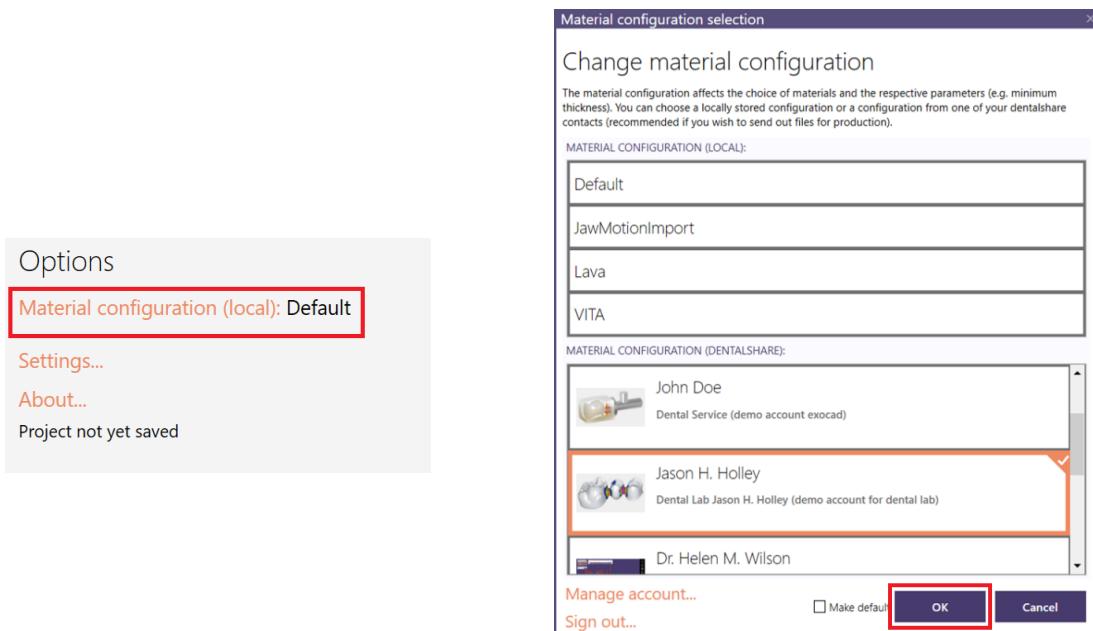


Figure 3.1: MATERIAL CONFIGURATION SELECTION window

Step 2: Select the material list of your manufacturing partner by clicking the contact in the list of available partners.

Step 3: Click OK.

3.2 Selecting a Service

After signing in, the DENTALSHARE UPLOAD window opens and shows a list of Services offered by users of your group (see Figure 3.2).

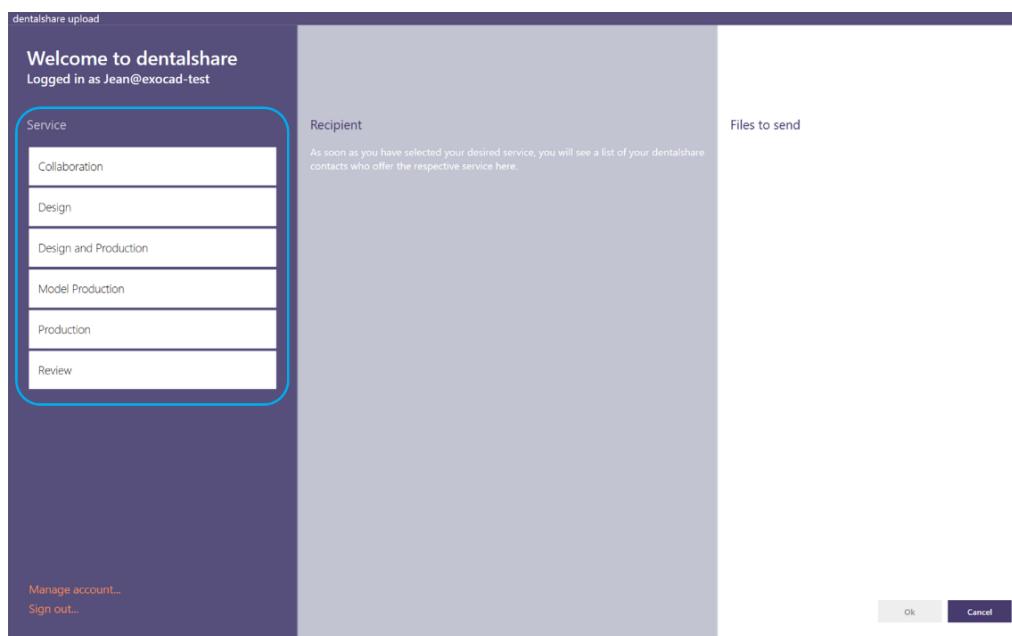


Figure 3.2: DENTALSHARE UPLOAD window with Services list

Design

Send scan data to get the design from your partner. See Chapter [5.1](#).

Production

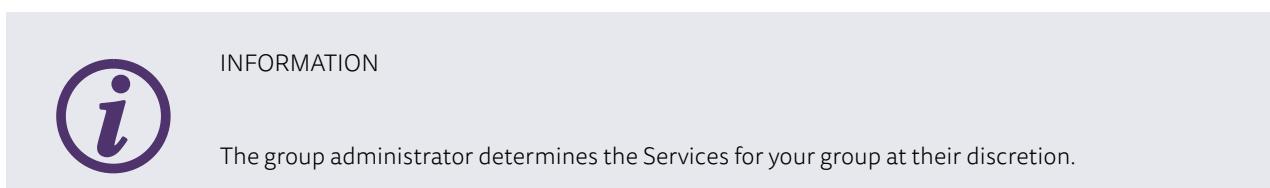
Send production data to get the manufactured restoration from your partner. See Chapter [5.2](#).

Design and Production

Send scan files to get the design and manufactured restoration from the recipient. See Chapter [5.3](#).

Model Production

Send scan data / model design data to get a produced model from your partner. See Chapter [5.4](#).



3.3 Selecting a Partner

After you have selected a Service, a list of possible partners is displayed (see RECIPIENT in Figure [3.3](#)). This list contains dentalshare users of your group who offer the selected Service and who are currently accepting data. Select the desired partner by clicking it in the list.

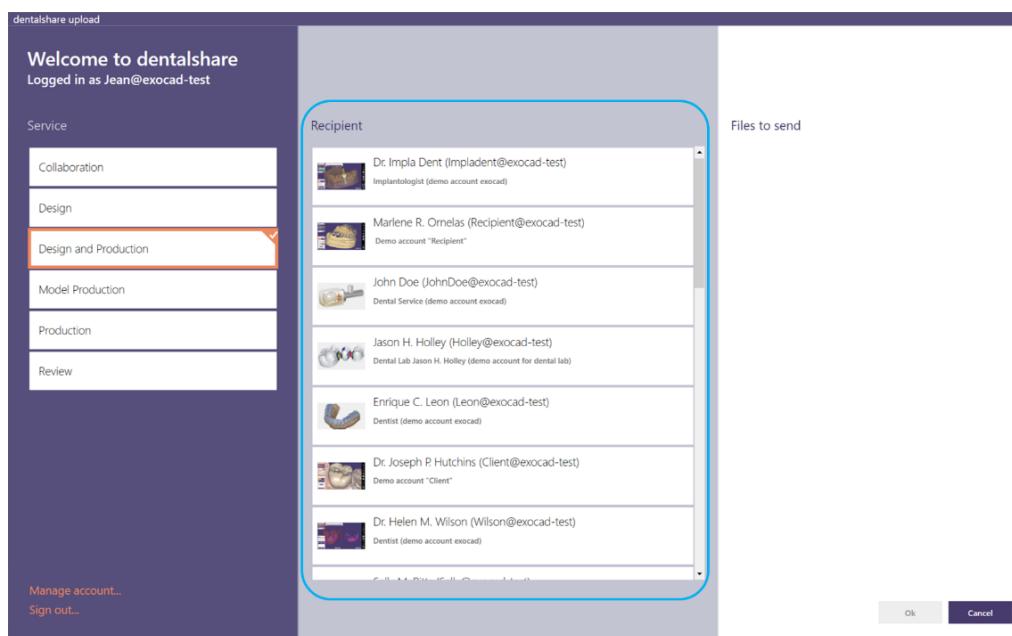


Figure 3.3: DENTALSHARE UPLOAD window with Recipients list

3.4 Selecting Data to Send

After you have selected your partner, a list of data for sending is displayed (see Figure 3.4). Select the data to send by activating the corresponding checkboxes.

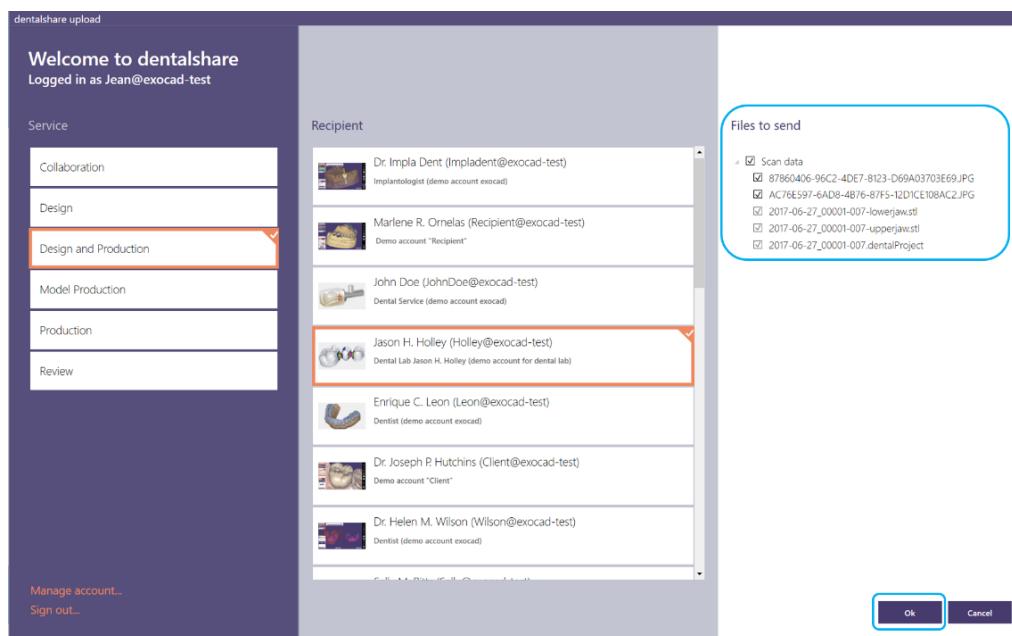


Figure 3.4: DENTALSHARE UPLOAD window with files

The list of data displayed depends on the selected Service:

- Design: scan data
- Design and Production: scan data

- Production: production data, design data
- Review: review data, (model) production data
- Model Production: scan data, model production data



INFORMATION

Using the triangle icons in front of checkboxes, you can expand file lists of a certain category.
If you send the *.dentalProject file, the recipient can open the project in DentalDB.

4 Data Transfer Status Indicators and Functionality

While sending/receiving data, different status indicators and symbols appear:

1. Activities of the upload/download client are indicated by arrow symbols in the task bar (see Chapter [4.1](#).)
2. In DentalDB, a status bar indicates the current state of the upload and the current workflow state with symbols and colors (see Chapter [4.2](#)).
3. You can open an additional info section in DentalDB to view all data transfers, status notifications, and messages of a project (see Chapter [4.3](#)).
4. While an order is loaded, the status of each order sent or received is displayed in the Load list of the DentalDB (see Chapter [4.4](#)).

4.1 Status Symbols in Task Bar

While sending/receiving data, uploads/downloads are performed via the dentalshare server. The upload/download status is indicated by colored arrows in the task bar (see Figure 4.1).



Figure 4.1: Task bar with arrows

The arrow colors show the upload/download activities:

Arrow color	Description
	Upload/download in progress
	No upload/download activity
	Upload/download error
	Info about a new incoming data transfer

Click the upload/download arrow to view data transfer details in the transfer tracking window (see Figure 4.2).

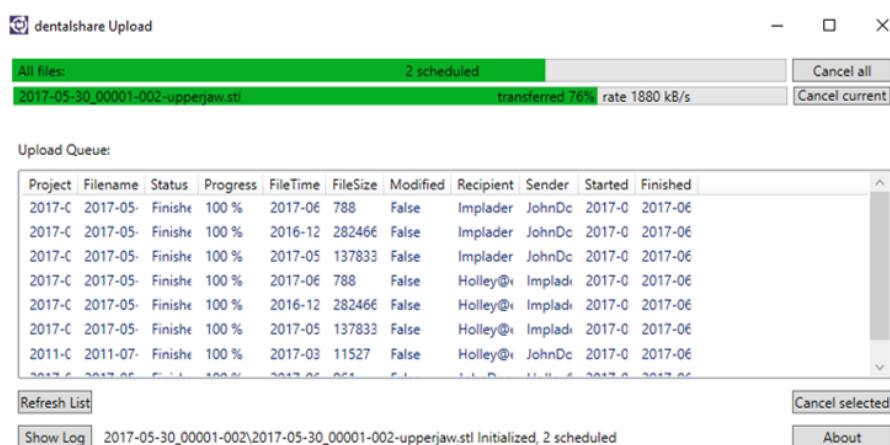


Figure 4.2: Transfer tracking window



INFORMATION

If data is sent to you, you receive an email notification with the sender's name and the project directory's title. Furthermore, the email requests you to ensure that the download client is running, in order to receive the data as quickly as possible. You can deactivate these email notifications in the user account settings, see Chapter 6.1.

After the download of a dataset is completed, a notification appears in the bottom right corner of the screen (see Figure 4.3). It informs you about the download completion and shows project details. You can directly view the project in the DentalDB by clicking **VIEW IN DENTALDB**.

If you do not view the project in DentalDB directly, dentalshare adds it to the **DENTALSHARE: NEW PROJECTS** list (see Figure 4.4). You can view this list by clicking the arrow with the plus symbol. The projects are listed chronologically (latest above).

Right-clicking a project in the list opens a menu with available actions (see Figure 4.5).



Figure 4.3: Download notification window



Dentalshare: new projects			
Updated on	User name	Domain	Project name
▼ ✓ Imported 2			
26.06.2017 08:59:16	JohnDoe	exocad-test	2017-05-12_00001-004
26.06.2017 08:59:11	JohnDoe	exocad-test	2017-05-30_00001-002

Figure 4.4: DENTALSHARE: NEW PROJECTS list

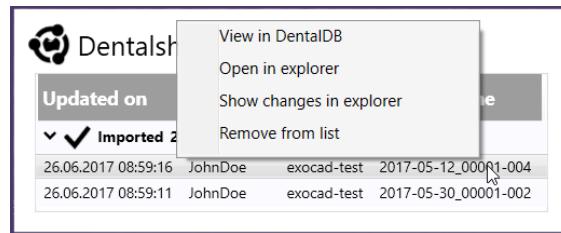


Figure 4.5: New projects list menu

INFORMATION

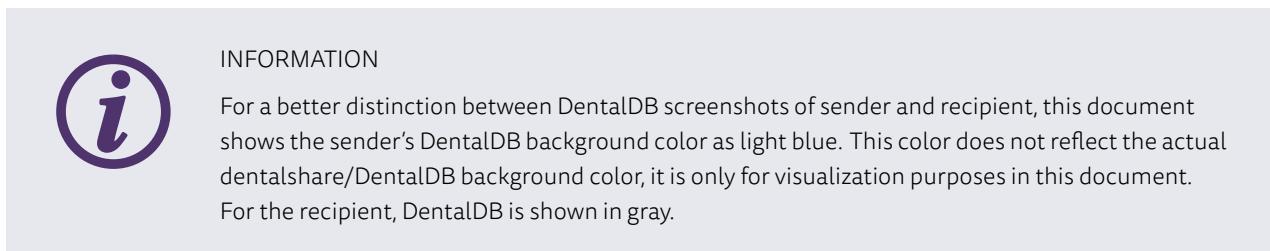


The projects remain in the list until you select **VIEW IN DENTALDB** or **REMOVE FROM LIST**, or close DentalDB. When you close DentalDB, the info arrow disappears. When you launch DentalDB again, the projects are no longer in the list of downloaded projects.

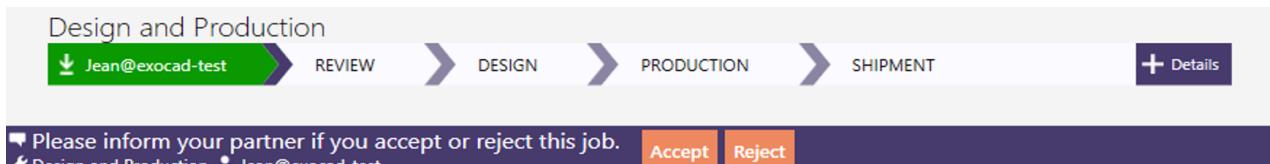
If the recipient receives data while DentalDB is closed, the info arrow will appear the next time you launch DentalDB. The projects list will include the new download activities.

4.2 Status Bar in DentalDB

Once project data has been sent/received via dentalshare, a new status bar appears in the bottom left corner of the DentalDB window. This status bar shows the sender/recipient, upload/download status, workflow status, and the dentalshare contact. Furthermore, you can view the complete data exchange and communication history of the project (see Chapter 4.3).



(a) Sender



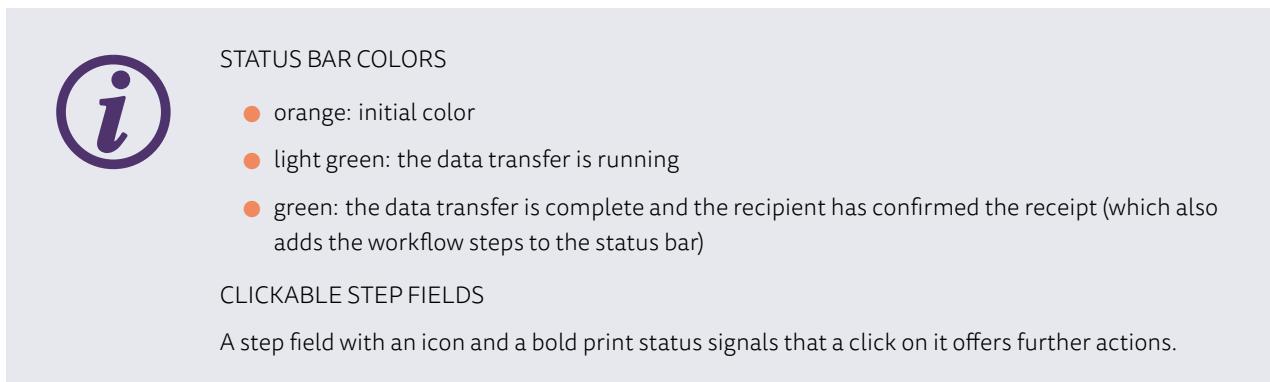
(b) Recipient

Figure 4.6: Status bars

Figure 4.6 shows the selected/requested dentalshare Service and the status bar including the following items:

- the transfer direction icon with recipient/sender ID
- the steps of the selected/requested Service
- the DETAILS button to view the full case history (data transfer, status notifications, messages, etc.) in a separate window (see Chapter 4.3)

The notification in the bottom of Figure 4.6(b) allows you to send required information to the sender and depends on the current workflow step.



4.3 Data Exchange Status and Communication History

If you click the DETAILS button on the right side of the status bar (see Figure 4.6), the DETAILS window appears (see Figure 4.7), showing the full communication history of the project.

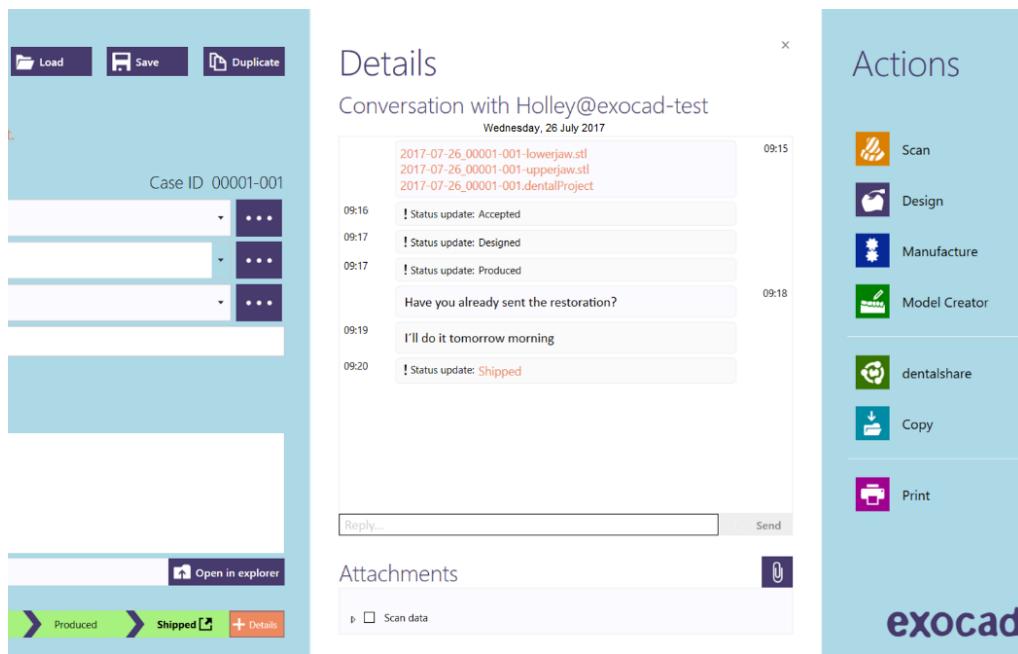


Figure 4.7: DETAILS window

The details include the data transfers, status information, and messages in chronological order. Your entries are displayed with date and time on the right side, your partner's actions/messages on the left side.

Further Communication Options

Sending a Text Message

You can type a message into the text field at the bottom of the window. Click SEND to send the message. **Note:** Do not refer to this function as a chat function, as sending/receiving messages is not instantaneous and depends on various factors (e.g. DentalDB being open).

Sending File Attachments

Using the paper clip button below the message text field, you can choose files for sending to your partner (e.g. images, PDF files, zip files). Click the button, select the desired file in the appearing file selection dialog, and click SEND.

Sending Project-Related Data

In the ATTACHMENTS section, you can select additional project-related data for sending to your partner, e.g. a new scan file if you have created a new jaw scan, or new design files. If your task is Design and Production, you cannot send new design files using this option, as your task is to create the final physical restoration.

Sending Status Updates

Recipients have the additional option to manually send status updates using the STATUS section (see Figure 4.8). If an order was already accepted, it can be still rejected here. When rejecting a review order, you must additionally type in a message into the text field. If setting the status to SHIPPED, you can optionally insert the URL to the tracking number.

Figure 4.8 shows the STATUS section for the Service Design & Production. For other Services, the section shows different status update options.

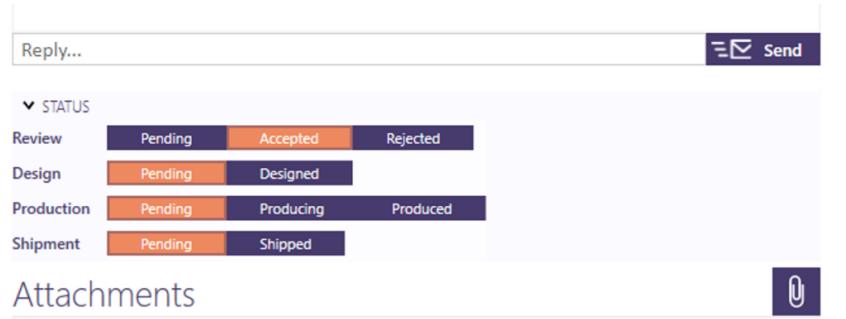


Figure 4.8: STATUS section

4.4 Status Indicators in the Load List

You can load projects received via dentalshare using the LOAD button in the DentalDB, which will display the Load list (see Figure 4.9). Projects you have received via dentalshare are categorized as Imported Projects.

Last status	Date/Time	Patient name	Client/Lab	Case ID	Technician name
Accepted	2017-07-25 09:21	Rogers, Luis C.	Jean@exocad-test	00001-002	
Designed	2017-07-25 09:06	Wolfe, Jack V.	Jean@exocad-test	00001-001	
Designed	2017-07-06 16:54	Shaw, Harry	Client@exocad-test	00001-015	
	2017-07-06 16:31	Ziolkowski, James	Client@exocad-test	00001-010	
Rejected	2017-07-06 16:54	Stoll, Jose J.	Client@exocad-test	00001-009	
Accepted	2017-07-06 16:14	Jaffe, Danny	Client@exocad-test	00001-008	
	2017-07-06 11:23	Dishon, Alejandro E.	Client@exocad-test	00001-002	
Shipped	2017-06-27 15:16	Barnett, Elizabeth	Client@exocad-test	00001-010	
Accepted	2017-06-27 15:08	Barrios, Alice E.	Client@exocad-test	00001-009	

Figure 4.9: Load list in the DentalDB

You can see the sender in the CLIENT/LAB column. Unread orders are highlighted in blue. In the LAST STATUS column, you can see the status of the order.

5 Workflows

Depending on the Service you have selected (see Chapter 3.2), different workflows are performed. A workflow consists of sending/receiving the project data, accepting/rejecting the order, sending messages / giving status information, and sending results.

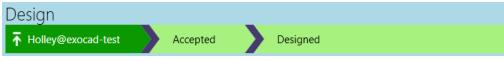
This chapter describes only the differences in the workflow steps of the individual Services. You find a detailed description of the different steps in Chapter 4.



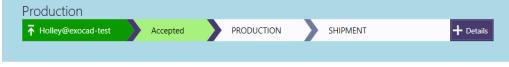
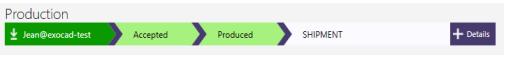
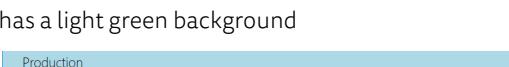
INFORMATION

- The workflow steps described in this chapter refer to the standard version of dentalshare. The selection of Service options and other functionalities can be individually configured by exocad distributors.
- For visualization purposes, the sender screenshots in this chapter have a light blue background. This background color does not reflect the actual dentalshare/DentalDB background color.

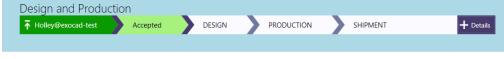
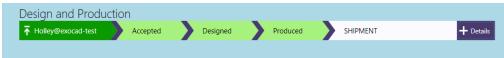
5.1 Service Design

Sender	Recipient
Sends order with scan data to recipient -> Status bar with workflow steps appears 	Receives order with data -> Status bar with workflow steps appears when loading the received project in the DentalDB 
	Accepts the order
The field REVIEW in the status bar changes to ACCEPTED and has a light green background 	The field REVIEW in the status bar changes to ACCEPTED and has a light green background 
	Designs the reconstruction
	Sends design data to client
The field DESIGN in the status bar changes to DESIGNED and has a light green background 	The field DESIGN in the status bar changes to DESIGNED and has a light green background 

5.2 Service Production

Sender	Recipient
<p>Sends order with design data to recipient -> Status bar with workflow steps appears</p> 	<p>Receives order with data -> Status bar with workflow steps appears when loading the received project in the DentalDB</p> 
	Accepts the order
<p>The field REVIEW in the status bar changes to ACCEPTED and has a light green background</p> 	<p>The field REVIEW in the status bar changes to ACCEPTED and has a light green background</p> 
	Manufactures the reconstruction
	Sends notification about finished production to client
<p>The field PRODUCTION in the status bar changes to PRODUCED and has a light green background</p> 	<p>The field PRODUCTION in the status bar changes to PRODUCED and has a light green background</p> 
	Ships the reconstruction
	Sends notification about shipment to client
<p>The field SHIPMENT in the status bar changes to SHIPPED and has a light green background</p> 	<p>The field SHIPMENT in the status bar changes to SHIPPED and has a light green background</p> 

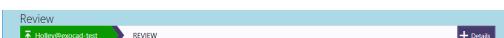
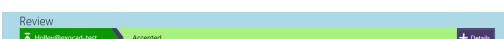
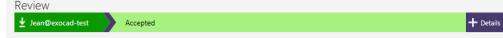
5.3 Service Design and Production

Client (sender)	Recipient
Sends order with scan data to recipient -> Status bar with workflow steps appears	Receives order with data -> Status bar with workflow steps appears
	
The field REVIEW in the status bar changes to ACCEPTED and has a light green background	Accepts the order
	The field REVIEW in the status bar changes to ACCEPTED and has a light green background
	Designs the reconstruction
	Sends notification about finished design to client
The field DESIGN in the status bar changes to DESIGNED and has a light green background	The field DESIGN in the status bar changes to DESIGNED and has a light green background
	
	Produces the reconstruction
	Sends notification about production to client
The field PRODUCTION in the status bar changes to PRODUCED and has a light green background	The field PRODUCTION in the status bar changes to PRODUCED and has a light green background
	
	Ships the reconstruction
	Sends notification about shipment to client
The field SHIPMENT in the status bar changes to SHIPPED and has a light green background	The field SHIPMENT in the status bar changes to SHIPPED and has a light green background
	

5.4 Service Model Production

Client (sender)	Recipient
Sends order with model design data to recipient -> Status bar with workflow steps appears	Receives order with data -> Status bar with workflow steps appears when loading the received project in the DentalDB
	
	Accepts the order
The field REVIEW in the status bar changes to ACCEPTED and has a light green background	The field REVIEW in the status bar changes to ACCEPTED and has a light green background
	
	Produces the model
	Sends notification about model production to client
The field PRODUCTION in the status bar changes to PRODUCED and has a light green background	The field PRODUCTION in the status bar changes to PRODUCED and has a light green background
	
	Ships the order
	Sends notification about order shipment to client
The field SHIPMENT in the status bar changes to SHIPPED and has a light green background	The field SHIPMENT in the status bar changes to SHIPPED and has a light green background
	

5.5 Service Review

Client (sender)	Recipient
Sends review request with scene file to recipient -> Status bar with workflow steps appears	Receives request with data -> Status bar with workflow steps appears when loading the received project in the DentalDB
	
	Reviews the data and accepts
The field REVIEW in the status bar changes to ACCEPTED and has a light green background	The field REVIEW in the status bar changes to ACCEPTED and has a light green background
	

6 Managing the dentalshare User Account

To access your dentalshare user account, open the dentalshare website <https://secure.exocad.com/dentalshare/> and log in with your dentalshare credentials.

The dentalshare user account consists of four tabs:

1. MY ACCOUNT, see Chapter 6.1
2. MY CONTACTS, see Chapter 6.2
3. STATISTICS, see Chapter 6.3
4. PROPERTY SETTINGS, see Chapter 6.4

6.1 Tab "My Account"

Figure 6.1

Name & Credentials

Displays login name, group and name. You cannot change login name and group (grey background), but you can change the name displayed to your contacts. To generate a new password for your account, click **CHANGE PASSWORD**. You can select to generate a random password which will be sent to you via email, or set a password of your choice.

Web & Email

You cannot change the email address, as it is derived from your registration. You can enter a URL for your webpage which will be displayed to your contacts only. You can also enter a URL for an image (e.g. company logo). To do this, right-click the desired image in a browser window and select to copy the image's URL in the appearing menu. Paste the URL into the **IMAGE URL** field. The image will be visible to your contacts in their recipients list.

Description (displayed to contacts)

You can enter a description for your laboratory, e.g. it may be beneficial to specify the city and country of your lab. You can enter a translation for your description text in the **TRANSLATION** field for partners with a different language. To add the translation, select a language in the dropdown menu below the **TRANSLATION** field and click **Add**. To remove an existing translation, click **REMOVE**. If you have added a translation, you can add further translations the same way. The corresponding translated description will be shown to users if they have selected that language.

Settings

You can set your user language in the corresponding dropdown menu. The update of the dentalshare user interface to the new language may require you to log out and back in again. However, selecting your native language as user language is important, as you are able to see the descriptions of your contacts in your language if a corresponding translation was added by the contact.

If you are currently not accepting data from other users, uncheck **I AM CURRENTLY ACCEPTING DATA**.

If you do not want to receive notifications via Email when data are being uploaded to your account, deactivate **EMAIL NOTIFICATION WHEN A NEW TRANSFER TO ME IS INITIATED**.

In the **PREFERRED SERVER** dropdown menu, you can select between different servers in different countries. It is recommended to select the nearest server in order to achieve ideal upload/download rates.

Stored Data

Displays the volume of data you have uploaded/downloaded and the total volume of data transferred for your account.

Offered Services

Using the checkboxes, you can define which Services you offer. Your contacts will only see your profile in their list when selecting one of the Services you offer.

To save your changes in the **My Account** tab, click **Save**. Click **Cancel** to discard your changes.

6.2 Tab "My Contacts"

The screenshot shows the 'MY CONTACTS' tab selected in the top navigation bar. The interface is divided into several sections:

- Create new contacts:** A form to enter a login name and group. It includes fields for 'Login' (text input), 'Group' (text input with 'john-doe-group' typed in), and a 'Send Contact Request' button.
- Open contact requests:** Two lists: 'My pending requests' and 'Received requests'. Each list has columns for 'Login', 'Name', and 'Group'. Buttons for 'Delete Request', 'Accept', and 'Reject' are at the bottom of each list.
- Current contacts:** A table showing a list of contacts with columns for 'Login', 'Name', and 'Group'. The contacts listed are:

Login	Name	Group
Impladent	Dr. Impla Dent	johnny-doe-group
Recipient	Marlene R. Ornelas	johnny-doe-group
Holley	Jason H. Holley	johnny-doe-group
Leon	Enrique C. Leon	johnny-doe-group
Client	Dr. Joseph P. Hutchins	johnny-doe-group
Wilson	Dr. Helen M. Wilson	johnny-doe-group
Sally	Sally M. Pitts	johnny-doe-group
Jean	Jean E. Martinez	johnny-doe-group

 Below the table are input fields for 'Login', 'Group', 'Name', 'User Language', 'Description', 'URL', and 'Email'. A 'Delete Contact' button is located to the right of these fields. A 'Refresh Lists' button is at the bottom.

Create new contacts

To add a contact to your contacts list, type in the desired contact's name in the LOGIN field. Click SEND CONTACT REQUEST to send a contact request to the user. You can also search a user by email address by typing the address in the corresponding field and then clicking SEARCH BY MAIL.

Open contact requests

Once you have sent a contact request, it appears in the list MY PENDING REQUESTS. To delete a pending request, select it in the list and click DELETE REQUEST. Your received contact requests appear in the list RECEIVED REQUESTS. To accept a received request, click ACCEPT. The contact will be automatically moved to the CURRENT CONTACTS list. To reject a request, click REJECT.

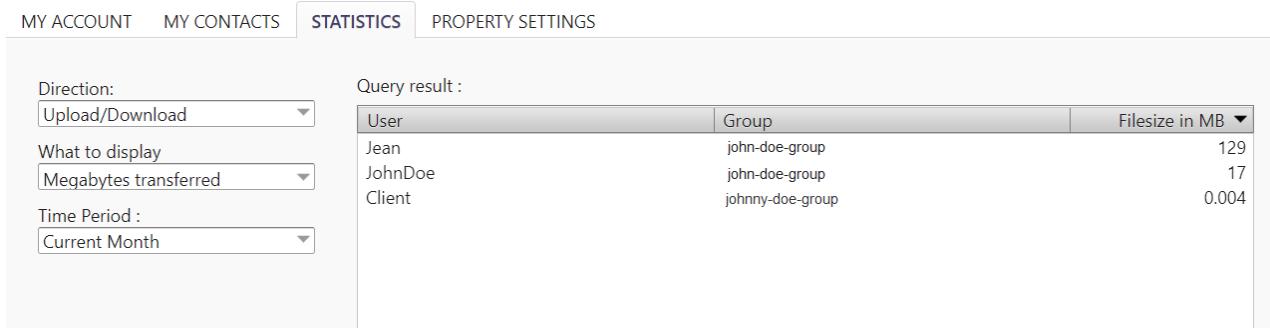
Current contacts

This list shows all your current contacts. When selecting a contact in the list, contact details are displayed in the fields below the list. To delete a contact, select it in the list and click DELETE CONTACT.

Refresh lists

If you have made changes to your contact lists, click Refresh Lists to update all lists.

6.3 Tab "Statistics"



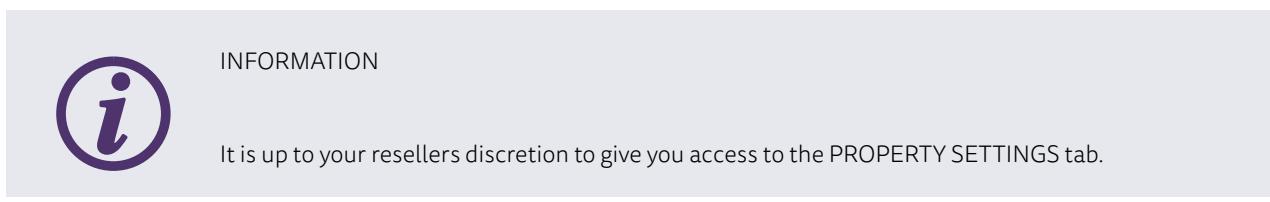
The screenshot shows the 'STATISTICS' tab selected in the top navigation bar. On the left, there are three dropdown menus: 'Direction' (set to 'Upload/Download'), 'What to display' (set to 'Megabytes transferred'), and 'Time Period' (set to 'Current Month'). To the right, a table titled 'Query result' displays data for three users: Jean, JohnDoe, and Client. The table has columns for 'User', 'Group', and 'Filesize in MB'. The data is as follows:

User	Group	Filesize in MB
Jean	john-doe-group	129
JohnDoe	john-doe-group	17
Client	johnny-doe-group	0.004

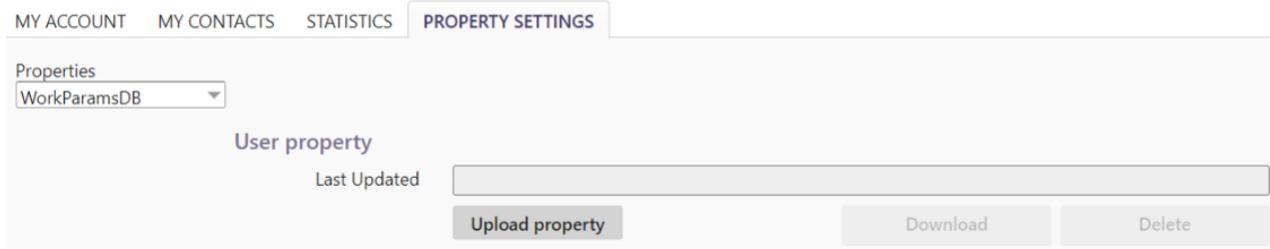
In this tab, you can monitor the data transfer volume for your account. Using the dropdown menus, you can select which statistics you want to display in the QUERY RESULT section:

- DIRECTION: transfer direction (Upload/Download, Upload, Download)
- WHAT TO DISPLAY: type of transfer (Megabytes, Number of projects / files / STL files / transfers)
- TIME PERIOD: transfer period (different day-/month-/year-based intervals)

6.4 Tab "Property Settings"



The screenshot shows the 'PROPERTY SETTINGS' tab selected in the top navigation bar. On the left, there is a large purple 'i' icon inside a circle, with the word 'INFORMATION' to its right. Below the icon, a message reads: 'It is up to your resellers discretion to give you access to the PROPERTY SETTINGS tab.'



The screenshot shows the 'PROPERTY SETTINGS' tab selected in the top navigation bar. On the left, there is a dropdown menu labeled 'Properties' with 'WorkParamsDB' selected. Below it, a section titled 'User property' shows a 'Last Updated' field with a date and time, and three buttons: 'Upload property', 'Download', and 'Delete'.

In this tab, you can upload your own material list. You might want to share it with your partners if you offer production Services. This allows your partner to create a production Service order with your own material list that fits your production devices (your partner needs to select your material list when creating the order, see Chapter 3.1).

To upload your material list:

Step 1: Click UPLOAD PROPERTY.

Step 2: Navigate to your DentalDB installation directory and select the folder `config`.

Step 3: Select the file `WorkParamsDB.xml` where you have specified your material list.

To download a material list, select it in the PROPERTIES dropdown and click DOWNLOAD. Click DELETE to delete the file.