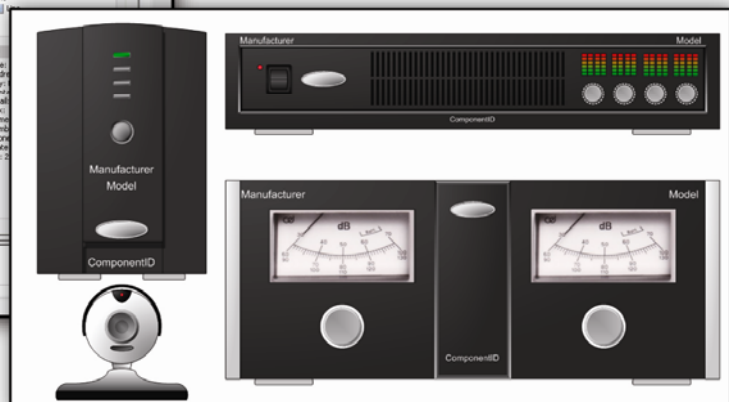
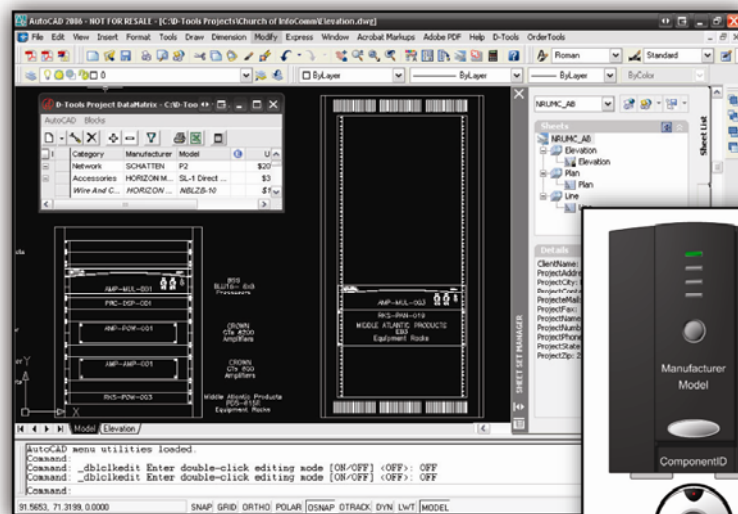


# System Integrator

# SI5



## Installation and Administration Guide



# SI 5 Installation and Administration Guide

The D-Tools System Integrator version 5 (SI5) Installation and Administration Guide was designed for Microsoft Visio 2003/2007, AutoCAD Version 2006/2007 and D-Tools SI5 system integration software.

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## ***Welcome to D-Tools SI5!***

Welcome to the growing family of **D-Tools System Integrator (SI)** users! I want to thank you for putting your confidence in D-Tools software. We know that D-Tools SI5 will be a powerful enhancement to your system integration business. D-Tools SI is the leader in complete system integration software and has been proven by thousands of system integration companies that are already using it to more effectively design, engineer, document, estimate, sell, install, and manage their low voltage projects. In fact, many companies have seen the software pay for itself in the first project through increased efficiencies throughout the company.

This latest version of D-Tools SI has been extensively tested on various computer platforms, but it has not been tested on the most important one... yours. Give it a try, run through a sample project, test it, and by all means, please don't hesitate to contact us to report any issues or questions so we can continue to improve the software. You will receive free in-version updates to our product over time as we continue to hone the product and add even more enhancements. We want you to be successful with this product. Feel free to contact us with ideas and thoughts about the program. Some of our best enhancements have come from users just like you.

While D-Tools has been designed to be simple to use, it is also a very deep and full functioned software product. I have included some ideas you can use to make a smoother transition from your previous design, estimating and business management procedures to D-Tools SI:

- Take a moment to peruse the users guide included with the software before jumping right in. This guide is full of tips, tricks and detailed information that will help you get the most from the software.
- Your corporate product database is one of your most important business assets. Take the time to prepare your database by following the steps outlined in the Manage My Product Data (MMPD) interface. MMPD was specifically designed to easily allow you to add, edit and enhance your product data. In addition don't forget to make frequent backups of your D-Tools SI database and projects.
- Open one of the sample projects included in your software. See how we have created packages, accessories and miscellaneous labor costs. Run all the reports you have available with this demo project. Finally, take a small project that you have completed in the past, one that is successful and you are happy with. This will allow you to get familiar with the program and begin to create a custom database of your most used products.

I highly recommend product training. Although not a requirement, product trainings are reasonably priced and are offered regionally throughout the year. We offer a number of regional,

on-site or web based trainings. Trainings are an excellent way to shorten the learning curve and quickly get up to speed. For more information about trainings visit <http://www.d-tools.com/training.html>.

It is our hope to always keep product data current and free for you to use. You can help in this regard by encouraging the manufacturers and reps you deal with to join the Manufacturer Vantage Point Partner Program. Please have them e-mail [mvp@d-tools.com](mailto:mvp@d-tools.com) for more information.

Thank you again for your purchase. If you take the time to implement the software into your everyday business practices, I know that you will join the growing group of companies using System Integrator who are seeing tremendous results! Please contact me if I can be of any additional help.

Sincerely,

A handwritten signature in black ink, appearing to read 'Adam Stone', with a long horizontal flourish extending to the right.

Adam Stone

President

[adam@d-tools.com](mailto:adam@d-tools.com)

# D-Tools Contact Information

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# Documentation Updates

Our documentation is under continuous improvement. To make sure you have the most recent versions please download the following.

## Installation and Administration Guide

<http://www.d-tools.com/site/downloads/SI%205%20Installation%20and%20Administration%20Guide.pdf>

## User Guide

<http://www.d-tools.com/site/downloads/SI%205%20User%20Guide.pdf>

## Tutorial

<http://www.d-tools.com/site/downloads/SI%205%20Tutorial.pdf>

## Forum

The D-Tools form provides a wealth of additional information about SI 5. We strongly encourage you to join the community and take advantage of the wealth of information provided. The forums are reviewed daily by D-Tools staff, partners and experiences users. You will find answers to most of your questions by using the forum search feature. Sign up today at

<http://www.d-tools.us>



# System Requirements

## Hardware requirements

2 GHz Pentium 4 (3 GHz recommended)

512 MB RAM (1 GB is recommended)

1GB Hard Drive (80GB is recommended)

XGA (1024x768) or better display device (Dual Displays recommended)

## OS Requirements

Windows XP Service Pack 2 or higher

Service Pack 2 can be downloaded from: <http://www.microsoft.com/windowsxp/sp2/default.msp>

Windows Vista Current Release

## Windows Required Components

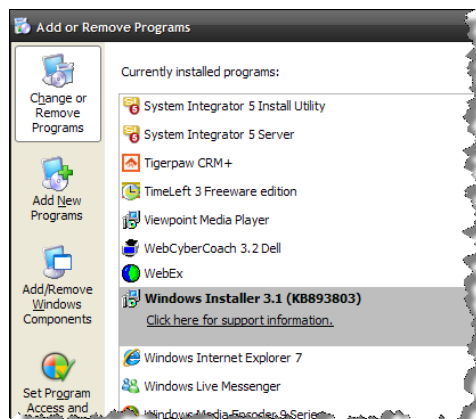
.Net2.0\*      Included on CD

.Net3.0\*      Included on CD

WSE3.0\*      Included on CD

Windows Installer 3.1\*\* (Use Control Panel > Add or Remove Programs to verify)

[Click here to download](#)



## Compatibility

SI 5 is compatible with the following third party applications:

### XP

Visio 2003 & 2007

Microsoft Office 2003 & 2007

AutoCAD 2006-2008

QuickBooks: [http://www.d-tools.com/site/products/link\\_tools\\_quickbooks.html](http://www.d-tools.com/site/products/link_tools_quickbooks.html)

### Vista

Visio 2003 & 2007

Microsoft Office 2003 & 2007

AutoCAD 2007\* & 2008

QuickBooks: [http://www.d-tools.com/site/products/link\\_tools\\_quickbooks.html](http://www.d-tools.com/site/products/link_tools_quickbooks.html)

\*AutoCAD 2007 on Vista requires the latest patches from the Autodesk website ([click here](#)).

If applicable, please install the third party drawing software you plan to use prior to installing SI 5. If you purchased SI 5 Standard or Professional, a license to Visio 2007 is included. You will find the installer located inside the Visio2007 folder on the SI 5 CD, or CD image.

# SI 5 License Guide

Let's start by defining our terms and then we will take a look at the different kinds of licenses and how they are managed.

## Definitions

**Customer:** Any organization which has purchased seat(s) of SI 5.

**User:** Any member of a customer assigned to use a seat of SI 5. There are two types of users, a) Machine and b) Network. See "License Type" below.

**Seat:** An install of SI 5. While a customer may have many seats, a particular seat's functionality is determined by the assignment of a license.

**License:** Represents a single sold unit of SI 5. A license must be sold for any seat to be activated. Users are assigned to licenses and the functionality of their seat is controlled by:

- The existence of a license.
- The type of license that is activated (Machine) or assigned to the user (Network).

**License Type:** There are two types of desktop licenses:

**Machine:** These are standalone licenses that are NOT managed by the LANSync Admin Console. When installing you will need the CD Key associated with the particular license. These licenses cannot synchronize data with other users or use Business Manager functionality. It is possible to install a Machine user within an organization that uses LANSync, see "Installing Desktop Components".

**Network (LANSync):** A Network license installs all of the SI 5 functionality on the Seat. However, the functionality presented to the user will depend on the license assigned to that user via the LANSync Admin Console. For example a Text user and a Pro user could share the same machine. You may install Network licenses on as many computers as you like, however, only one user may use the license at a time.

**Pro (Professional) License:** When purchased, this license includes a license for both LANSync and Business Manager. However when assigning users to licenses, the Business Manager license associated with the Pro license may instead be attached as an Add-On license to a Standard or Text license.

**Standard:** All Pro functionality except for a) MS Office integration b) access to the Report Designer, c) LANSync functionality and d) Business Manager functionality. As long as you purchased at least one Pro License, Standard may operate in a Server environment. A Business Manager Add-On license may be associated with a Standard license via the LANSync Admin Console.

**Text:** Same as Standard but without drawing capability.

**LanSync:** “Server” module allowing for the product sharing, project sharing, and license management. It is **also required** for the correct and complete operation of Business Manager. Only **one** license of LANSync need be present for all licensed seats to use the functionality.

**BusinessManager(BM):** Provides reporting, Sales Order and Work Order functionality. Business Manager is considered an **Add-On** license.

**Add-On:** Licensed functionality **added to** a seat of SI 5. Add-Ons are sold as separate licenses or bundled with existing licenses, such as Pro. Add-On licenses are dependent on an existing licensed seat or user in order to function.

**LinkTools:** Add-on functionality for managing Accounting System integrations.

**Status:** There are four license statuses:

- **Active:** Means the license is valid for all uses.
- **Deactive:** Means the license is invalid for any further use.
- **Deactivate On:** Includes a date. License is valid so long as the expiration date is in the future.
- **Trial:** Trial licenses are equivalent to Deactivate On status. The license is useable until the expiration date is met.

## License Requirements

The following rules apply to all Registration functionality

- A Customer must create an Administration user to access the LANSync Admin Console.
- The administration user is not a user of SI5 and does not need to be associated to a SI5 license. The administration user is simply a login to the administration console.
- During an install or upgrade, the Administration user must be created.

- A customer may have more users than licenses.
- More than one user may be assigned to the same license. However, only one user at a time may use that license.
- A customer may install more seats than licenses. In a Network installation, you may use the same CD key for all Desktop installs.
- A user must be assigned to a license in order to use a seat of SI-5.
- If a user is using a license, their license cannot be reassigned.
- Logging off of SI “frees up” a license so it could be reassigned or used by another assigned user.
- A user can only be assigned to one license of type Pro, Standard or Text.
- Users do not need to be assigned Business Manager licenses in order to share projects. All project and data sharing is a function of the availability of a Network install and appropriate user permissions.
- A user can be assigned to one Add-On license of each type.
- Users do not have to be assigned LANSync licenses in a Network install. LANSync enabled functionality only requires a successful connection to the LANSync server.
- At least one LANSync license must be present to make project and data sharing functionality available to all users.
- Users must have a Business Manager license in order to access Business Manager reporting, Sales Order and Work Order functionality.
- Sales and Work Order functionality require an active connection to the LANSync server. Most features of the Revision Manager, however, do not.
- A user in a company using Software Assurance must validate their license at least once every 30 days.
- An active internet connection is required to initially register the software, and to validate the license every 30 days (Software Assurance customers only).

Within a Network install, users are either logged in or logged out. When a user closes SI 5 they are automatically logged off unless they choose to work offline.

## License Validation and Expiration

License expiration dates are advanced 30 days every time the Machine user logs in, if the registration system designates the customer as having a valid license. If the user cannot connect to our server, then the expiration date is not advanced. Advancing the expiration date continues to require that our users connect to us at least once every 30 days. They DO NOT, however, have to actively perform that task. Every time a user opens SI and an internet connection is present, we will validate the license. If the license is valid, the expiration date will advance 30 days. Expiration dates are updated to LANSync on each log in. The system will prompt the user five days prior to expiration. An active internet connection is all that is required.

If a license is checked out and the user experiences a hardware failure or their computer is stolen, contact D-Tools Support for instructions on how to “release” this license, so that it may once again be used within your organization.

## License Management

**Machine Users:** Install SI 5 using the CD key associated with the desired functionality.

**Network Server:** Install the LANSync Server using a LANSync license CD key.

**Network User:** Use any non-LANSync CD key to install the Desktop Components. User license assignment will be managed by the LANSync Admin Console. See “SI 5 Administration” later in this guide.



# Installation Overview

The flowchart on the following page describes the installation process for the majority of users.

These installation scenarios include:

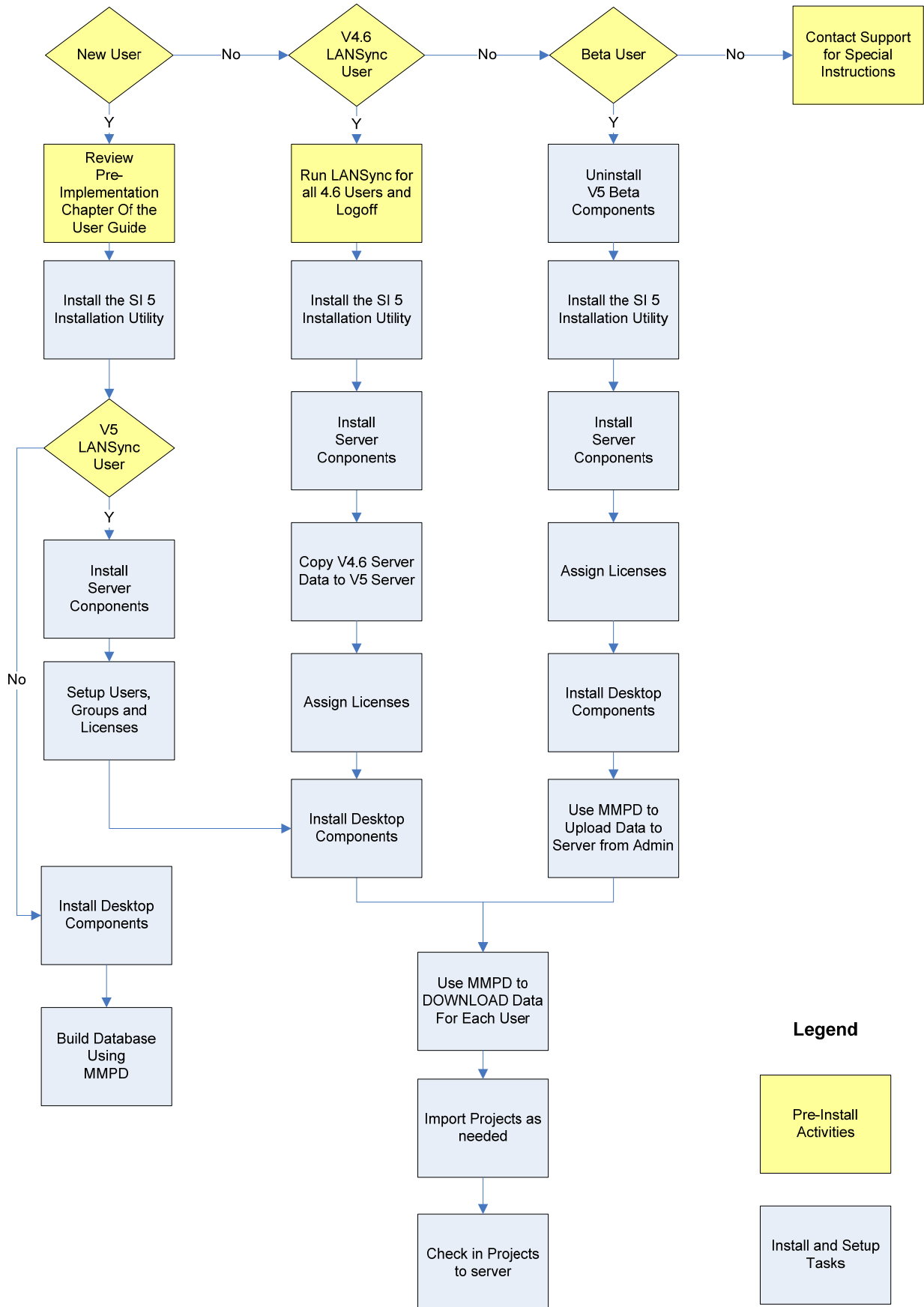
- 1) **New Users:** These are users that are installing D-Tools products for the first time. New users would fall into two categories:
  - a) **LANSync Users:** These are users that have purchased at least one license of SI 5 Pro and wish to use Business Manager and/or share data and projects between multiple users.
  - b) **Standalone Users:** These are users that have purchased a single license of SI 5 and intend to run it on only one computer.
- 2) **Current SI 4.6 User:** These are current SI 4.6 users that have purchased SI 5. Keep in mind that SI 5 is a new standalone application, it is NOT an “upgrade”. Therefore SI 4.6 and SI 5 can run on the same computer at the same time. This will allow you to continue to work on existing projects in SI 4.6 while you are preparing for the transition to SI 5. It is NOT necessary or recommended that you uninstall SI 4.6. The key issues for existing SI 4.6 users are:
  - a) **Database Conversion:** During the Server Install you will be given an opportunity to copy your existing SI 4.6 database and setup information to SI 5. To assure that all database updates are included, we recommend that each SI 4.6 user on your network run LANSync prior to installing the SI 5 server components and copying the database.
  - b) **Importing Projects:** Once the install is complete, you will use the SI 5 Project Navigator to import and “Check-In” projects.



*Note: All server data and shared Projects are now managed by LANSync. In SI 4.6 this functionality was associated with Business Manager.*

- 3) **SI 5 Beta User:** First we would like to say THANKS to all our SI 5 Beta participants. Your feedback was and will continue to be valued by our team. It is not required, but we recommend that you remove the SI 5 Beta before installing the current version of SI 5. Your primary decision will be to either:
  - a) Use the database you have been working with during the Beta process or

- b) Convert your existing SI 4.6 data during the Server Installation process.
- 4) If you are using a D-Tools product prior to SI 4.6, contact D-Tools support for instructions on how to proceed.





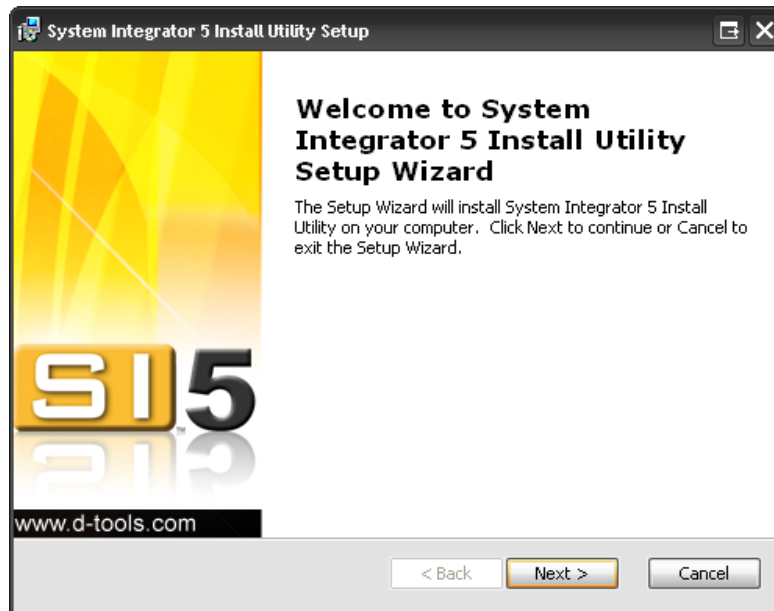
# Installing SI 5

The installation process consists of the following basic elements. See the flowchart on the previous page to determine your particular installation process:

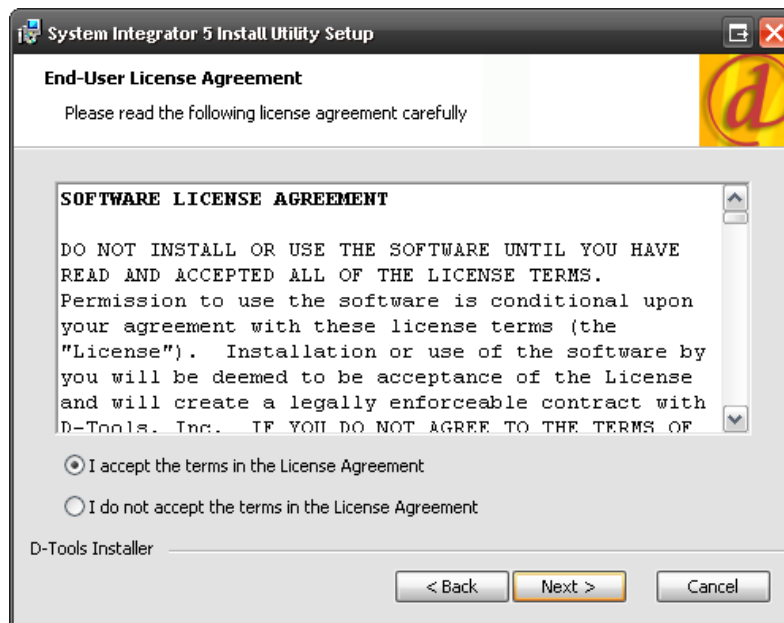
- 1) **Install Installation Utility** – This utility will manage the installation of all SI 5 applications and components.
- 2) **Install Server Components** – These must be physically installed on the Server computer. They cannot be installed over the LAN.
  - a) LANSync – Manages shared data, projects, licenses, permissions and users
  - b) Project Share – Location of Projects Share
  - c) Project Data Share – SQL data associated with all aspects of the project
  - d) Administration Console – Manages Users, Groups, Licenses and Permissions
  - e) SQL Server Components (if you choose)
- 3) **Install Desktop (Client) Components** – These will be installed on the individual User
  - a) SI 5 Pro
  - b) SI 5 Standard
  - c) SI 5 Text

## System Integrator 5 Install Utility Setup Wizard

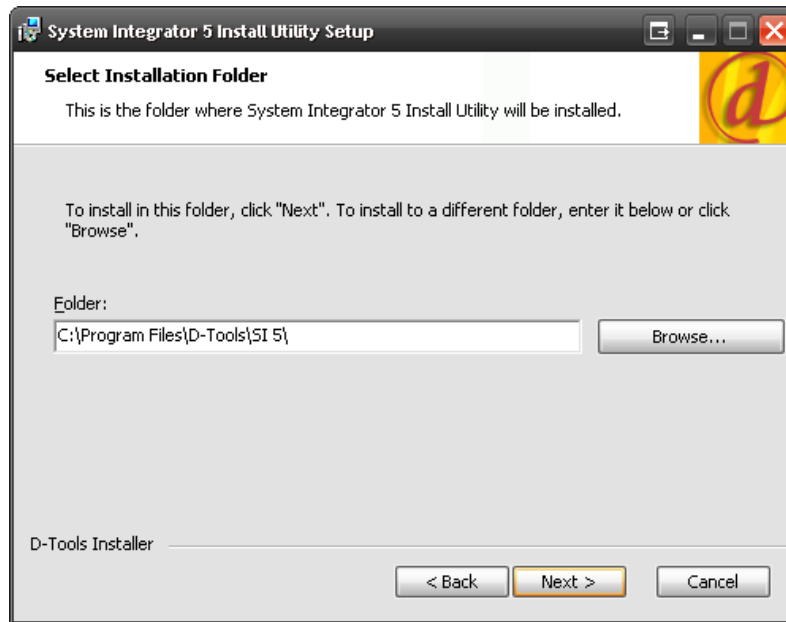
- 1) Insert disc into CD-ROM or better drive. Yes, we have to put this as a step...
- 2) If the installation process does not automatically begin, browse to the CD drive and Double-click the Setup.exe file. The System Integrator 5 Install Utility Setup form will open. Click [Next >].



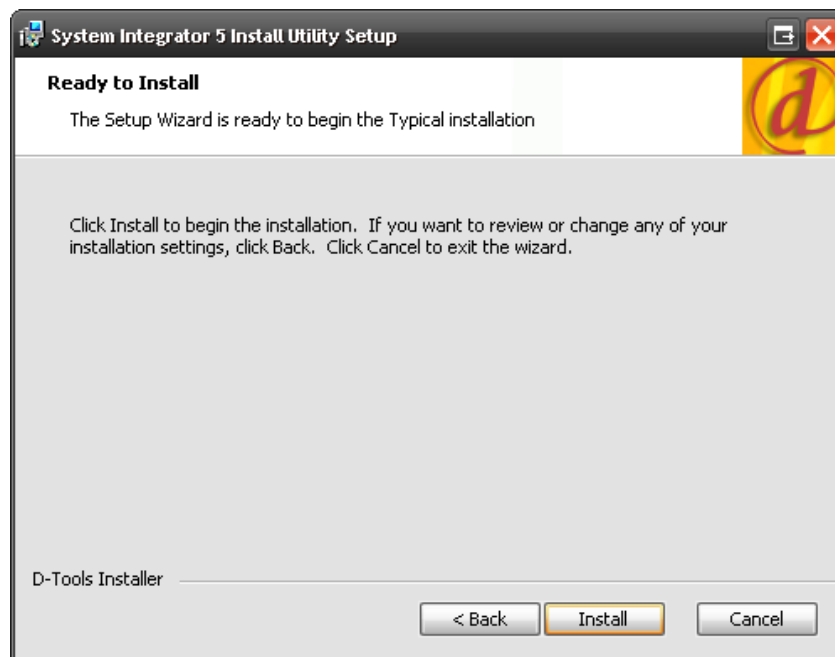
- 3) Read and accept the Software License Agreement and click [Next >].



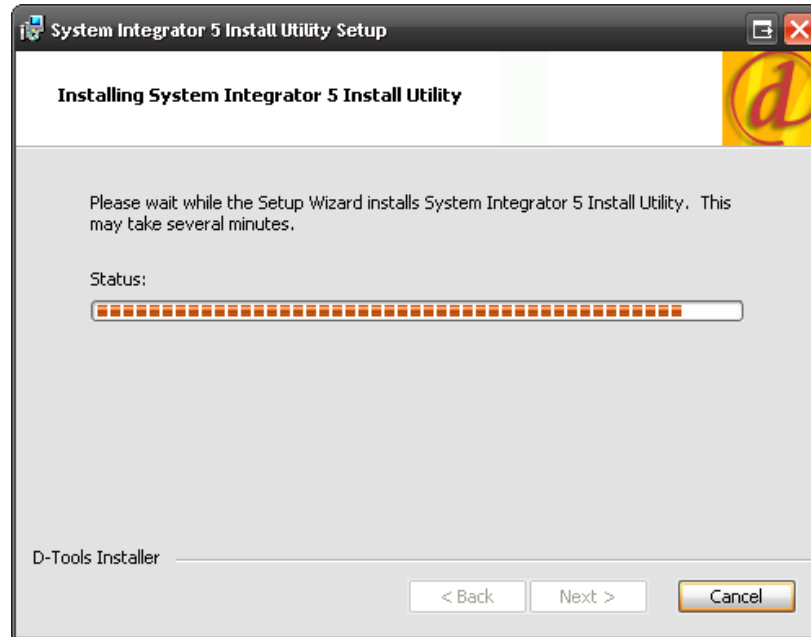
- 4) Choose the folder where you would like to install SI 5 and click [Next >]. We highly recommend that you leave the folder set to **C:\Program Files\D-Tools\SI 5**.



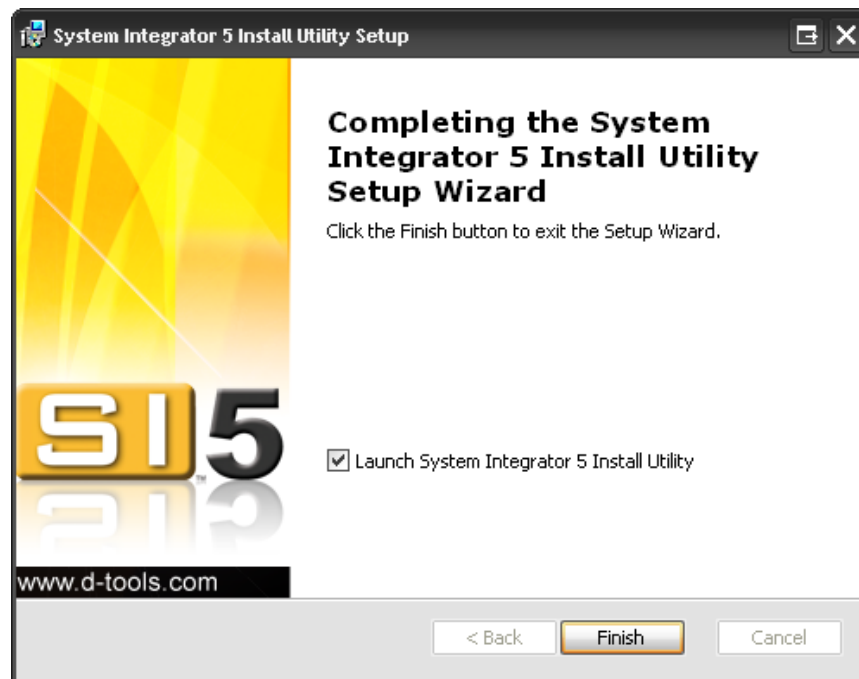
5) When you are sure you want to install, click **[Install]**.



Installation progress displays:

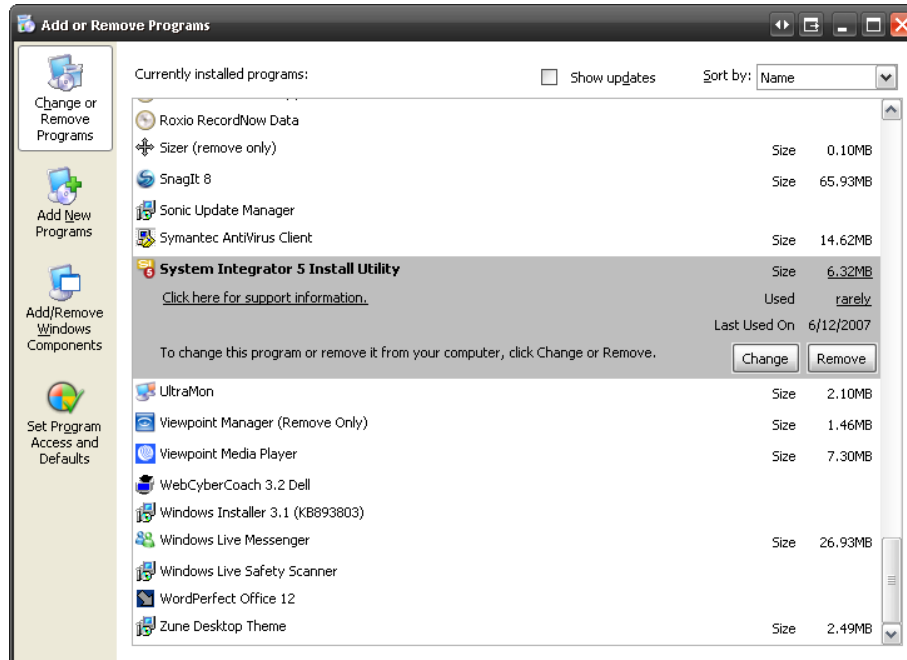


6) Click **[Finish]** when prompted:

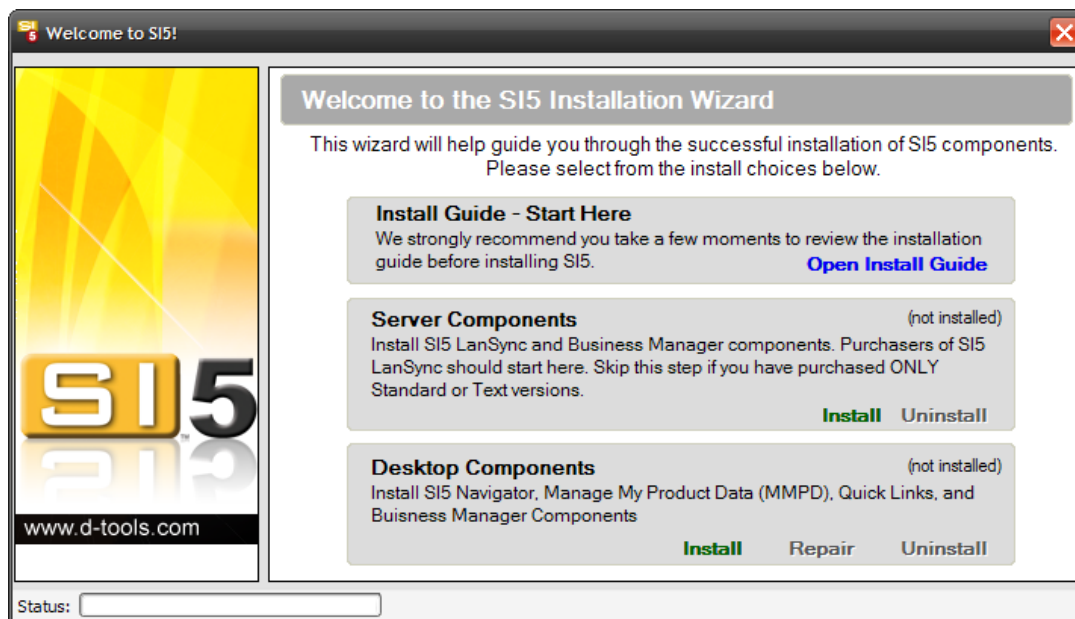




The System Integrator 5 Install Utility has been added to your list of programs:



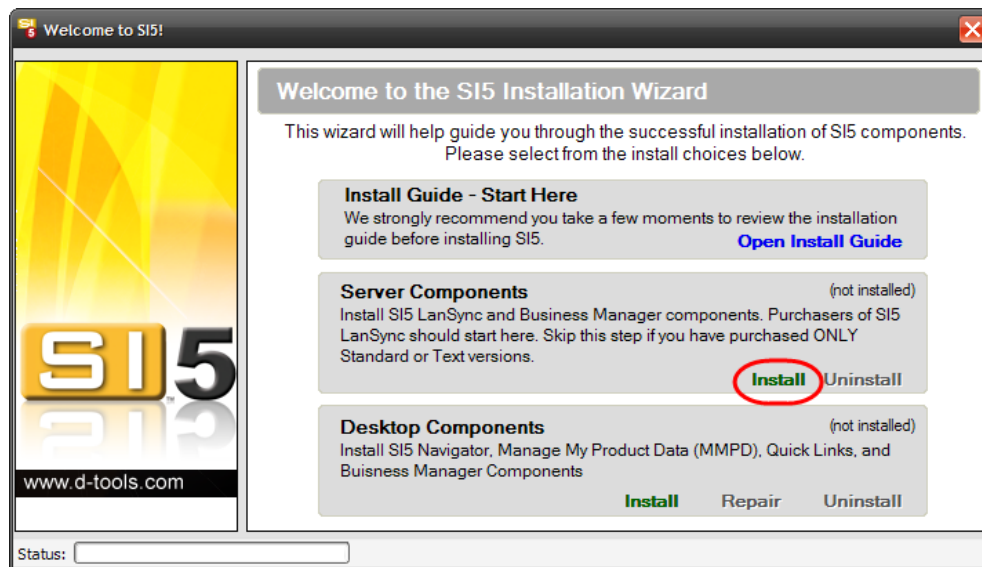
*If you leave the “Launch System Integrator 5 Install Utility” box checked, the SI 5 Installation Wizard will launch. It can also be launched from Start > All Programs > D-Tools > Install Utility.*



## System Integrator 5 Installation Wizard

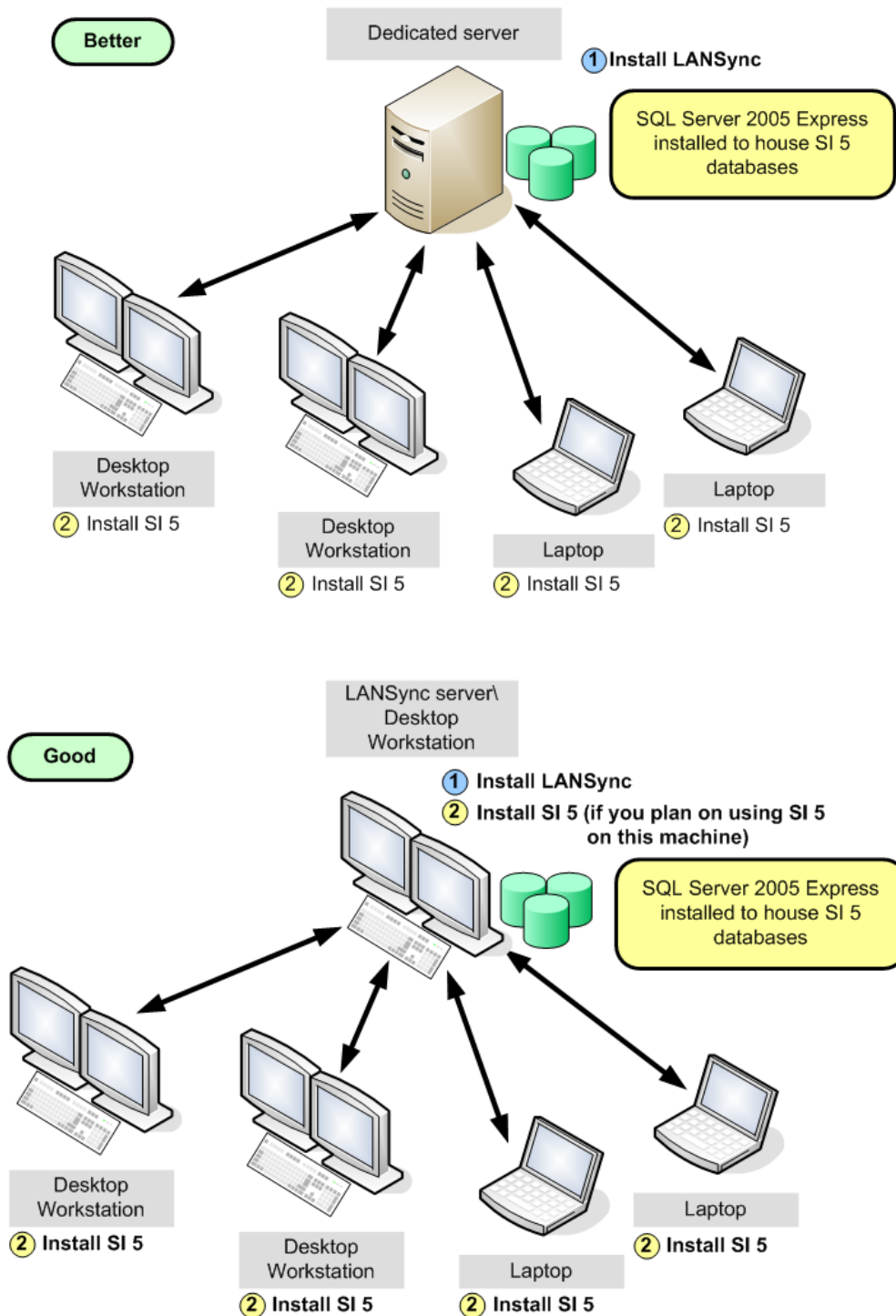
This wizard will walk you through the installation of SI 5. It is launched automatically during the installation process or it can be launched manually by: **Start->All Programs->D-Tools->Install**

**Utility.** There are two main types of installs for SI 5: Server Components and Desktop Components.

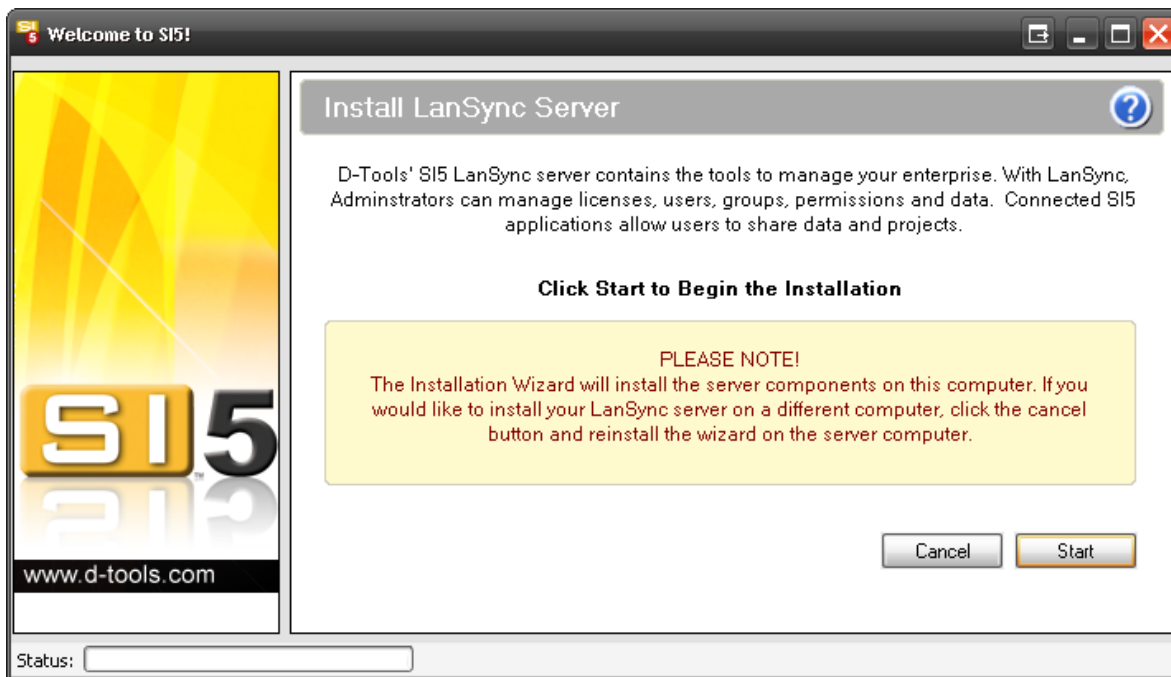


# Installing Server Components

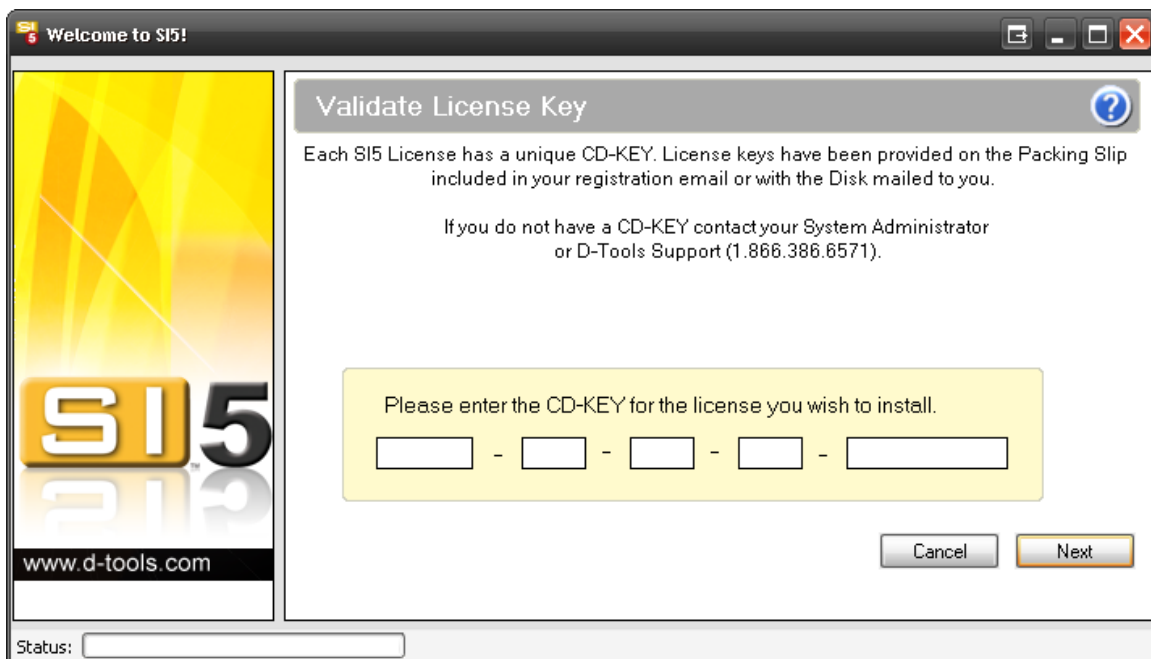
The Server Components should be installed on the machine that you are treating as your server. This machine could be a dedicated server (recommended) or it could be user's desktop PC. The installation must take place on the target machine, it cannot be installed over the LAN.



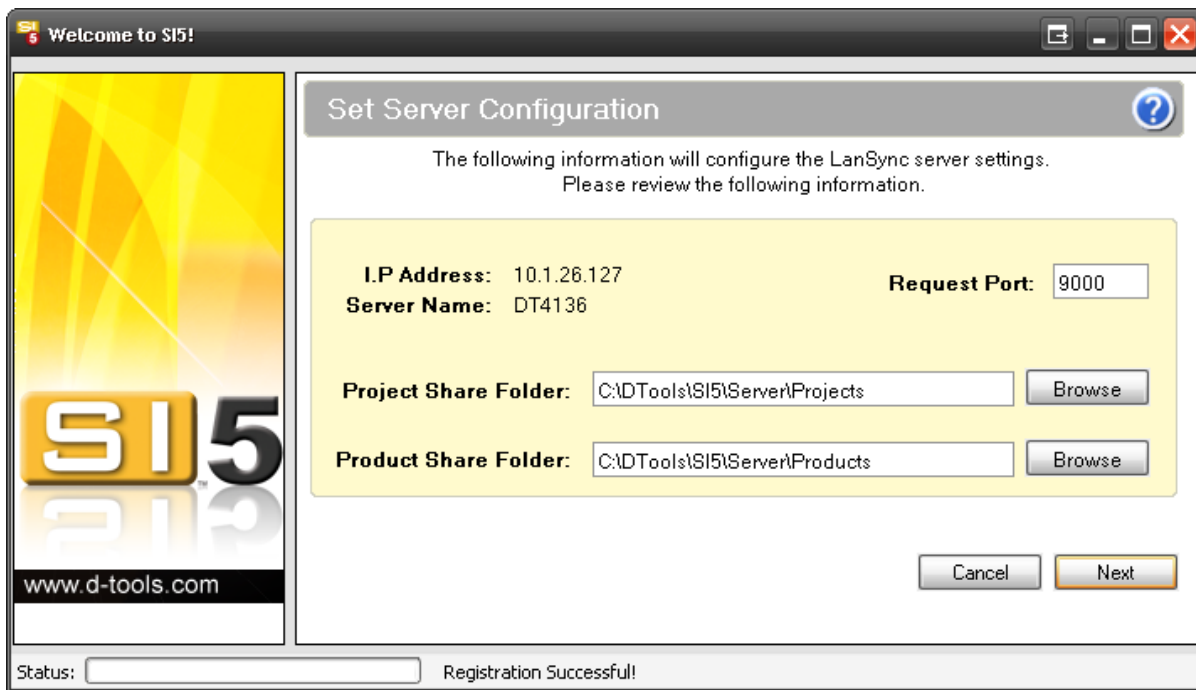
- 1) Clicking **[Install]** in the Server Components section begins the process for installing the LANSync Server:



- 2) Click **[Start]**. You will then be prompted to enter your SI 5 LANSync License Key:



- 3) Enter your LANSync CD-Key and click **[Next]**. You will be prompted to select your Project and Product share folders. Click **[Next]**.



Welcome to SI5!

### Set Server Configuration

The following information will configure the LanSync server settings.  
Please review the following information.

**I.P Address:** 10.1.26.127      **Request Port:** 9000  
**Server Name:** DT4136

**Project Share Folder:** C:\DTools\SI5\Server\Projects

**Product Share Folder:** C:\DTools\SI5\Server\Products

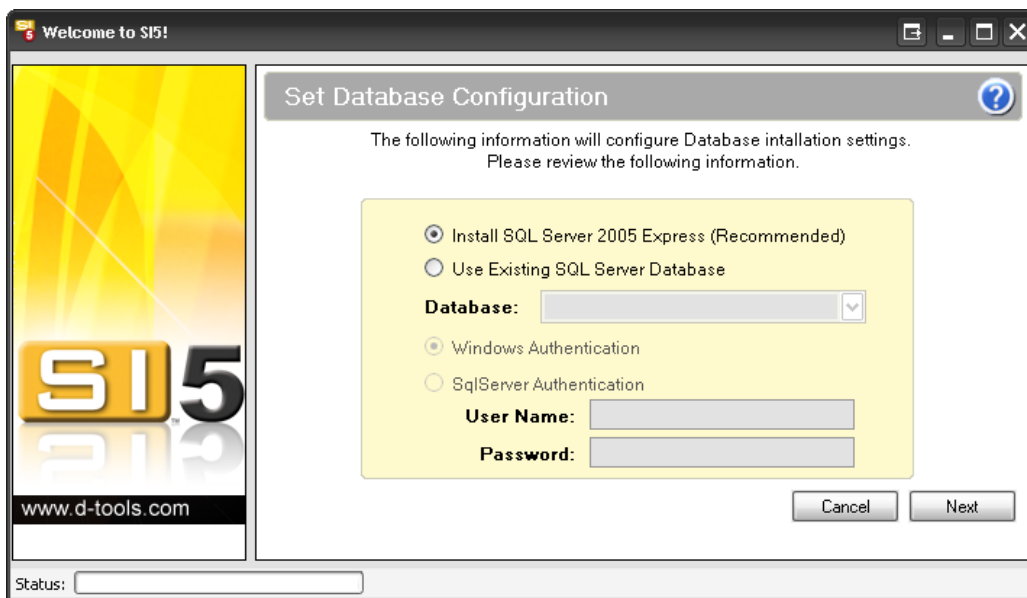
Status:  Registration Successful!



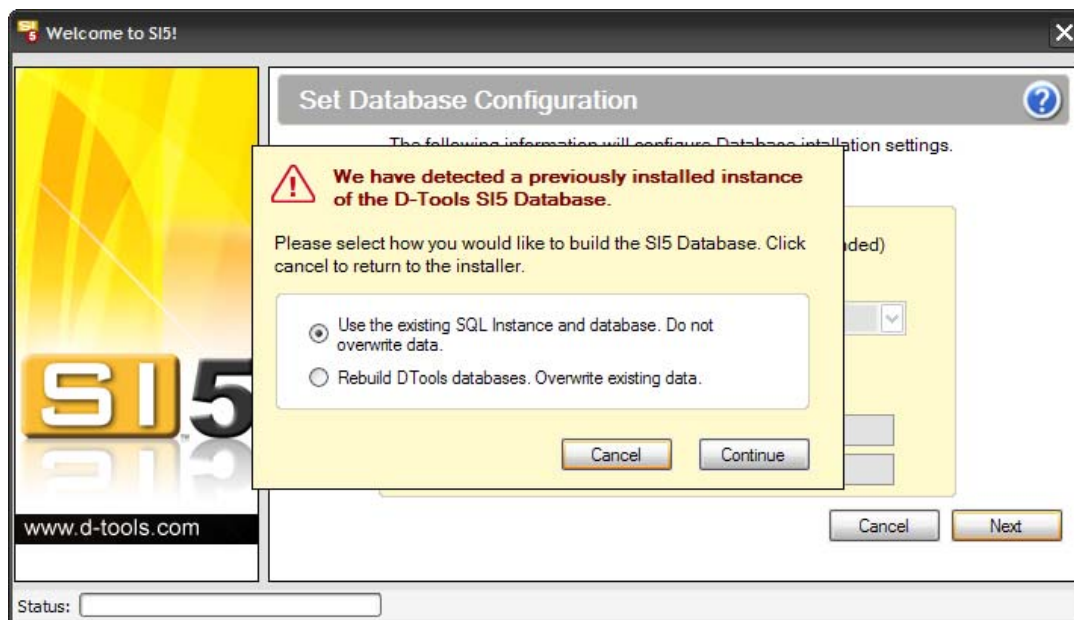
*The Project Share Folder is where you your server based projects will be stored. Each project will reside in a subfolder (or two or three) within the root of the folder chosen above.*

*The Request Port is set to 9000 by default. If you have a firewall installed you must either open port 9000 or change this value to an available open port. If you do not know what ports are available, contact your IT personnel or whoever configured your firewall.*

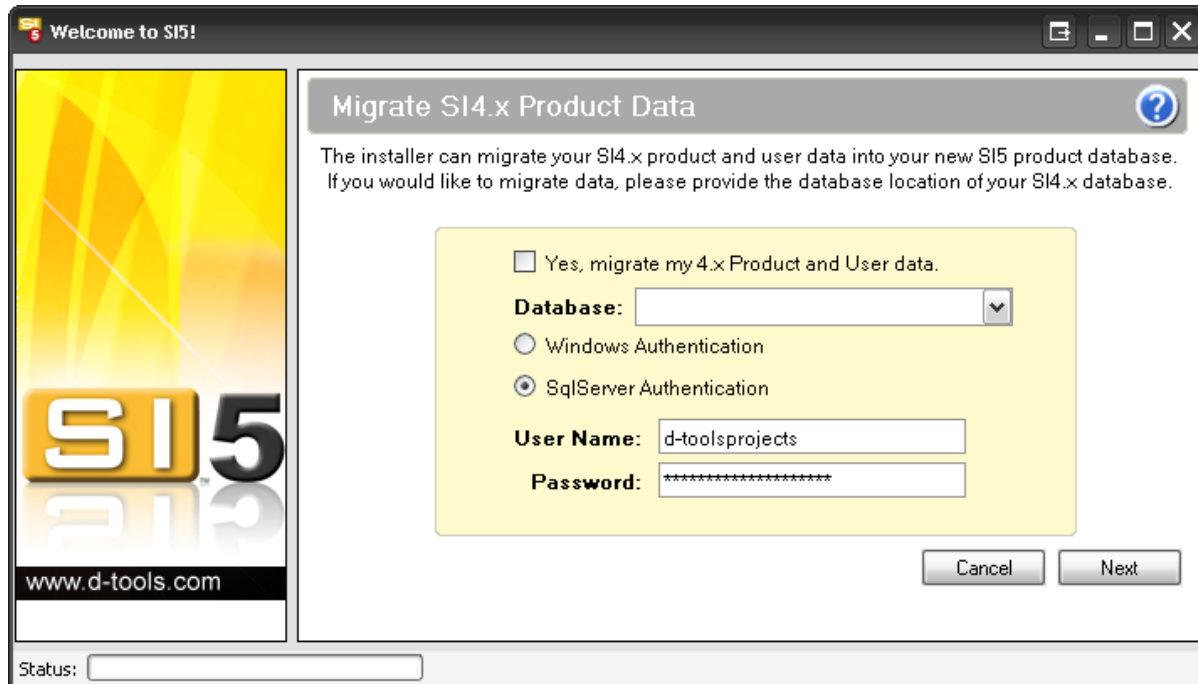
- 4) The next step is set your database configuration. We recommend that use the SQL Server 2005 Install rather than an existing SQL server database. If you wish to use an existing SQL server database, you should contact your IT professional or database administrator for proper login credentials. When ready, click **[Next]**.



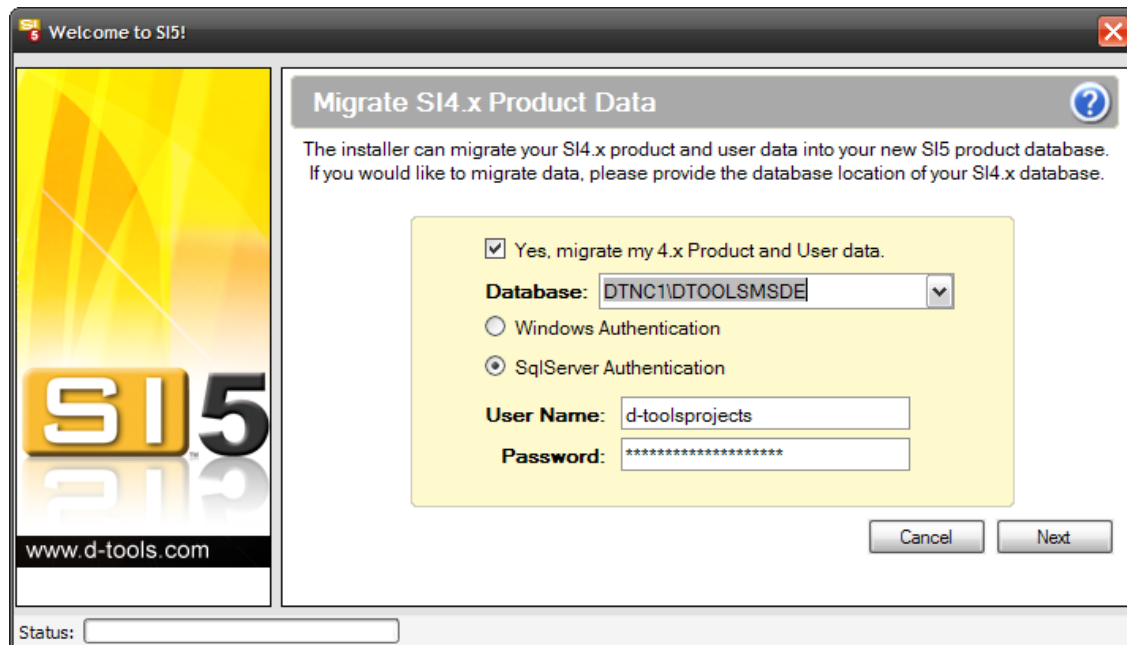
*If this is not the first time you have installed the Server Components on this machine you will see the following prompt, choose wisely.*



- 5) If you are an SI 4 user, you will have the option of migrating your SI 4 product data. If you do not wish to use your SI 4 Product Data, i.e. you want to start fresh, or if you are installing D-Tools SI for the first time, click **[Next]**.



- 6) If you wish to migrate your data, check the “Yes, migrate my 4.x Product and User Data” box.



- 7) You are then prompted to create a User Name and Password for the Administration Console within the LANSync server. Password is case sensitive. When finished, click **[Next]**.

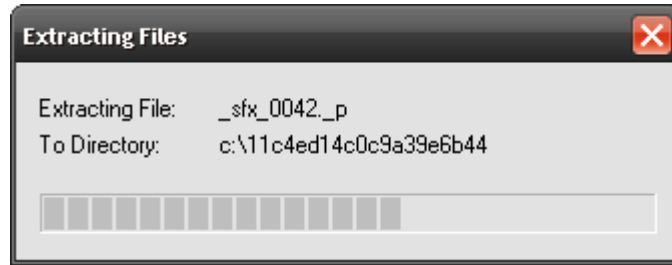
The screenshot shows a window titled "Welcome to SI5!". On the left is a vertical banner with the SI5 logo and the website "www.d-tools.com". The main area has a title bar "Create Administration User" with a help icon. Below the title bar, text reads: "The LanSync server includes a Administration Console to manage and configure your SI5 environment. Please create a Administration user and password." There are three input fields: "User Name:", "Password:", and "Confirm Password:". At the bottom right are "Cancel" and "Next" buttons. A "Status:" label is at the bottom left of the window.

- 8) When ready to complete the installation, click **[Install LanSync]**

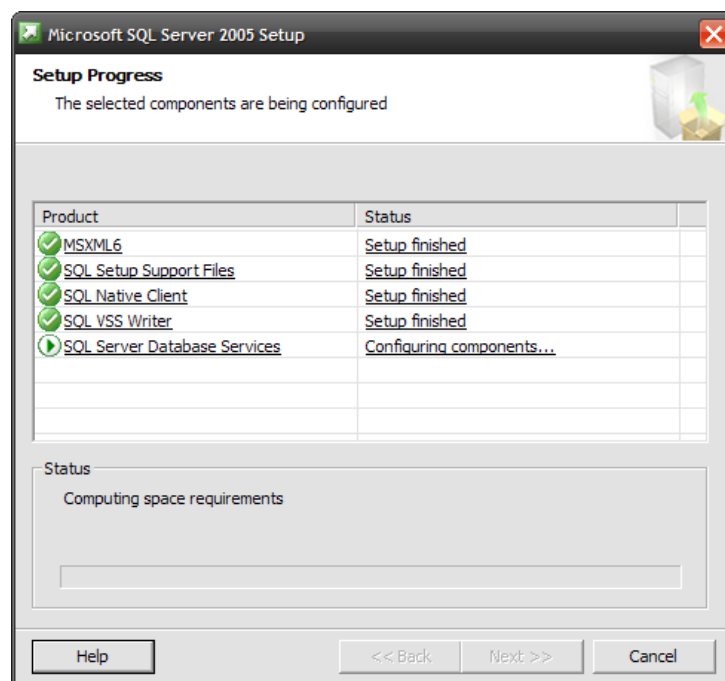
The screenshot shows a window titled "Welcome to SI5!". On the left is a vertical banner with the SI5 logo and the website "www.d-tools.com". The main area has a title bar "Install Server and Database Components" with a help icon. Below the title bar, text reads: "You are almost finished! Its time to install your SI5 LanSync server so you can get started. Click the install button to complete the installation. Once the installation finishes, the LanSync Administration Console will open so you can continue your enterprise configuration." There are two buttons: "Cancel" and "Install LanSync". A "Status:" label is at the bottom left of the window.



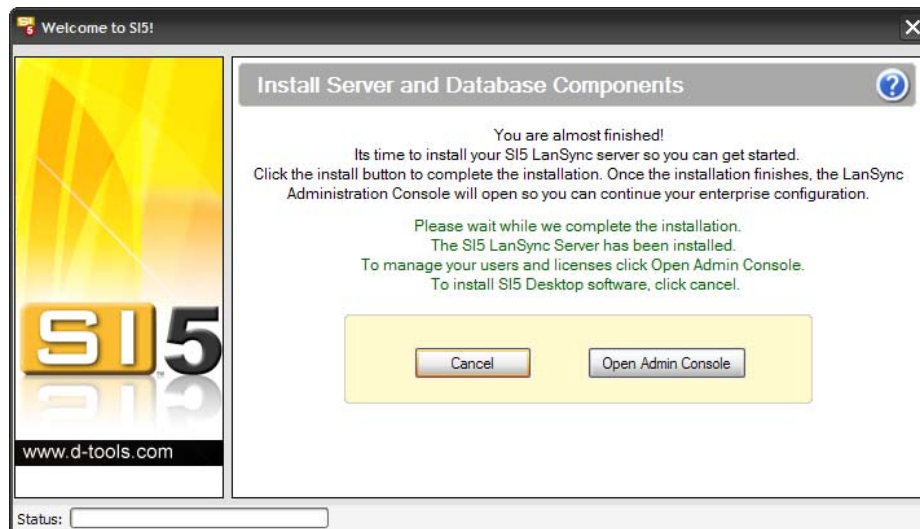
9) Files will extract and install:



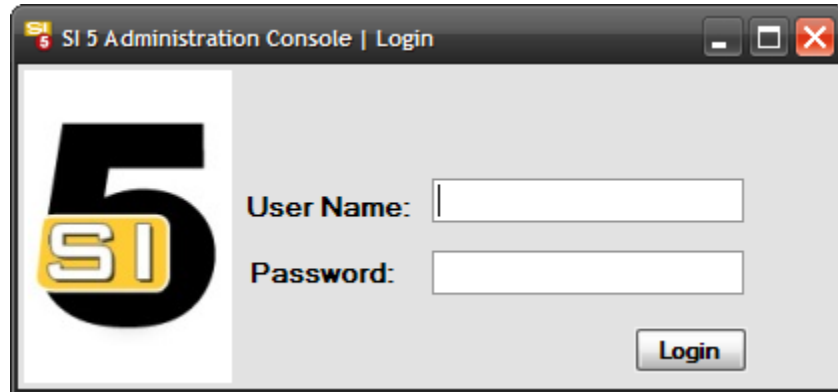
10) You should see a screen similar to the following that will temporarily appear during the installation process.



11) Microsoft SQL Server 2005 Express will install:



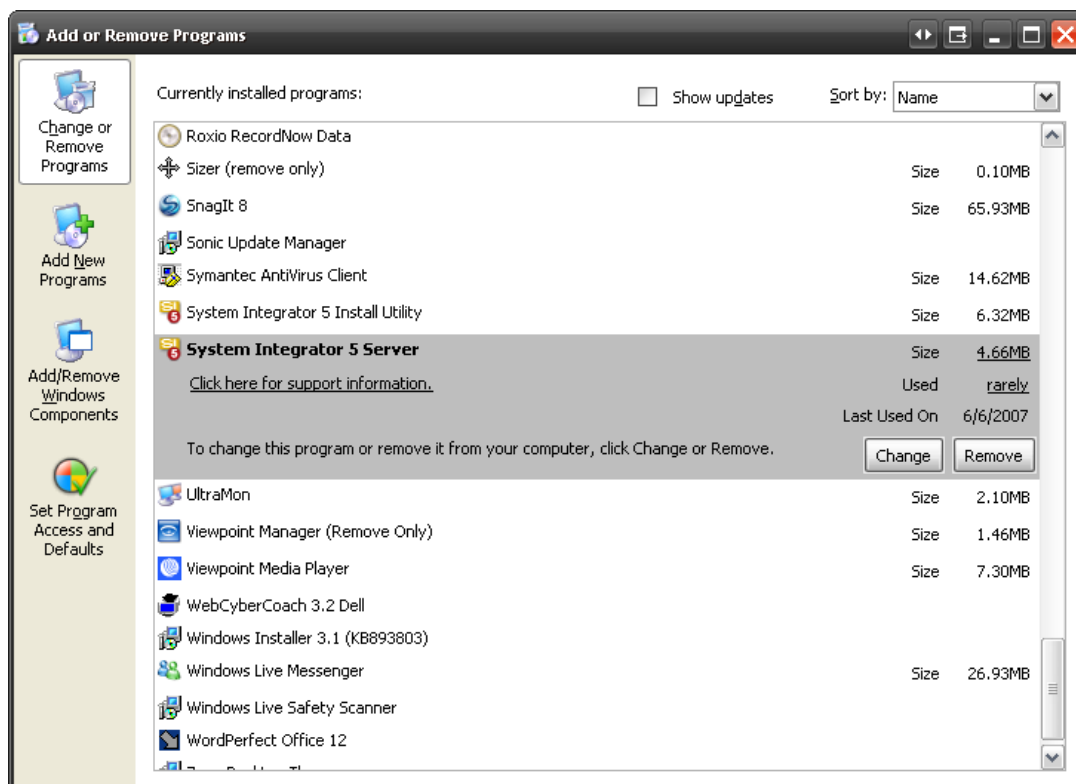
12) You will be prompted to login with the credentials provided in Step 7 above.



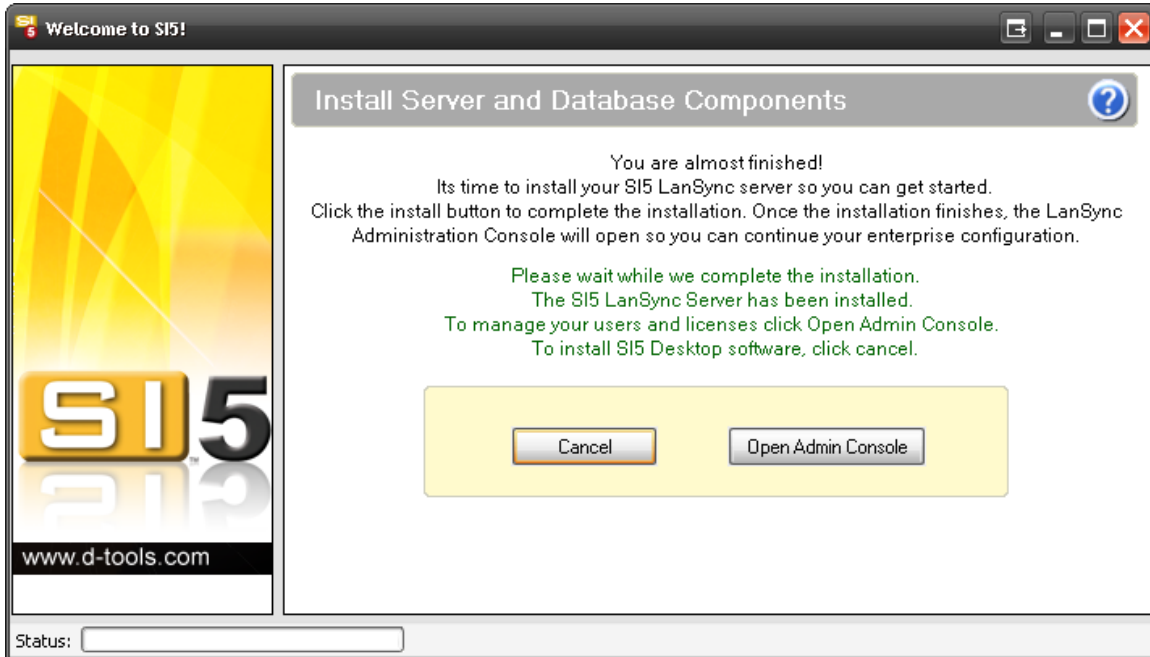
Here is a recap of what was just installed on your LANSync Server machine:

What	Type	Path	Purpose
SI 5 Product Database	SQL	SQL Server	Stores all SI 5 Product data
SI 5 User Database	SQL	SQL Server	Stores the Groups and User Permissions
Product Share Folder	Folder	C:\Dtools\SI5\Server\Products	Stores common data to be distributed via LANSync to the All Users Directory
Project Share Folder	Folder	C:\Dtools\SI5\Server\Projects	Stores SI 5 Project files

The following entry has been added to your Add/Remove programs:



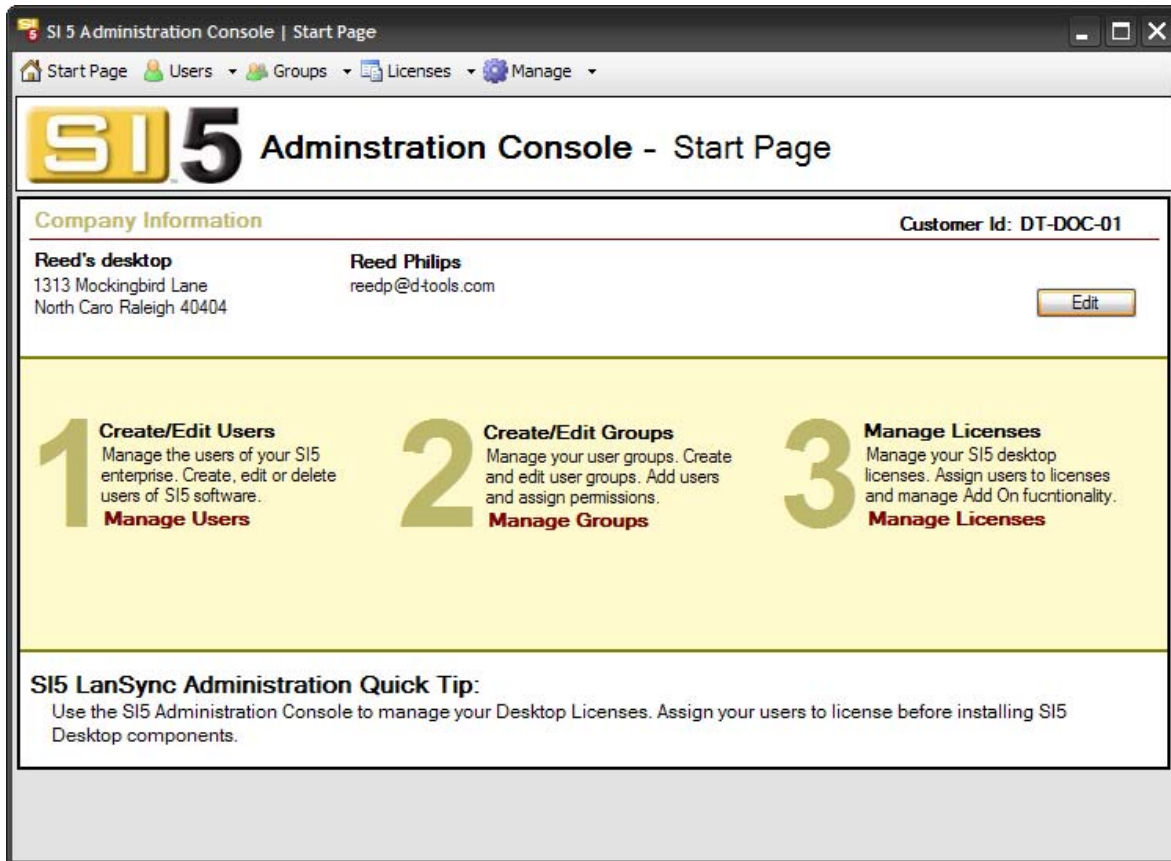
At this point, you can click **[Cancel]** to install the SI 5 Desktop software on this machine or you may choose to click **[Open Admin Console]** to manage your users and licenses. See SI 5 Administration for details.



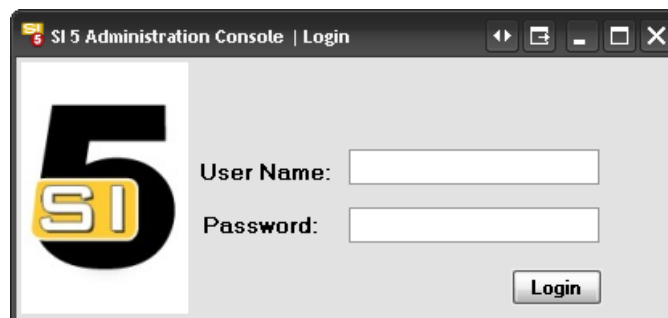


# SI 5 Administration

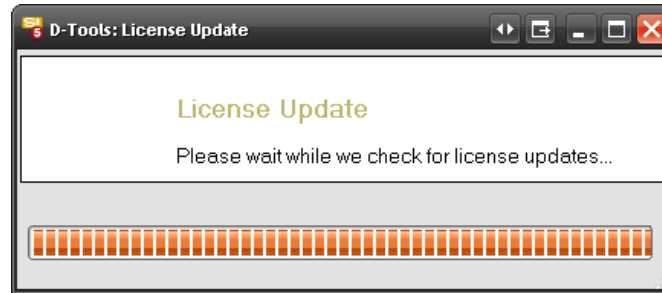
The SI 5 Administration Console is where you will manage Users, Groups, Licenses and Server Data.



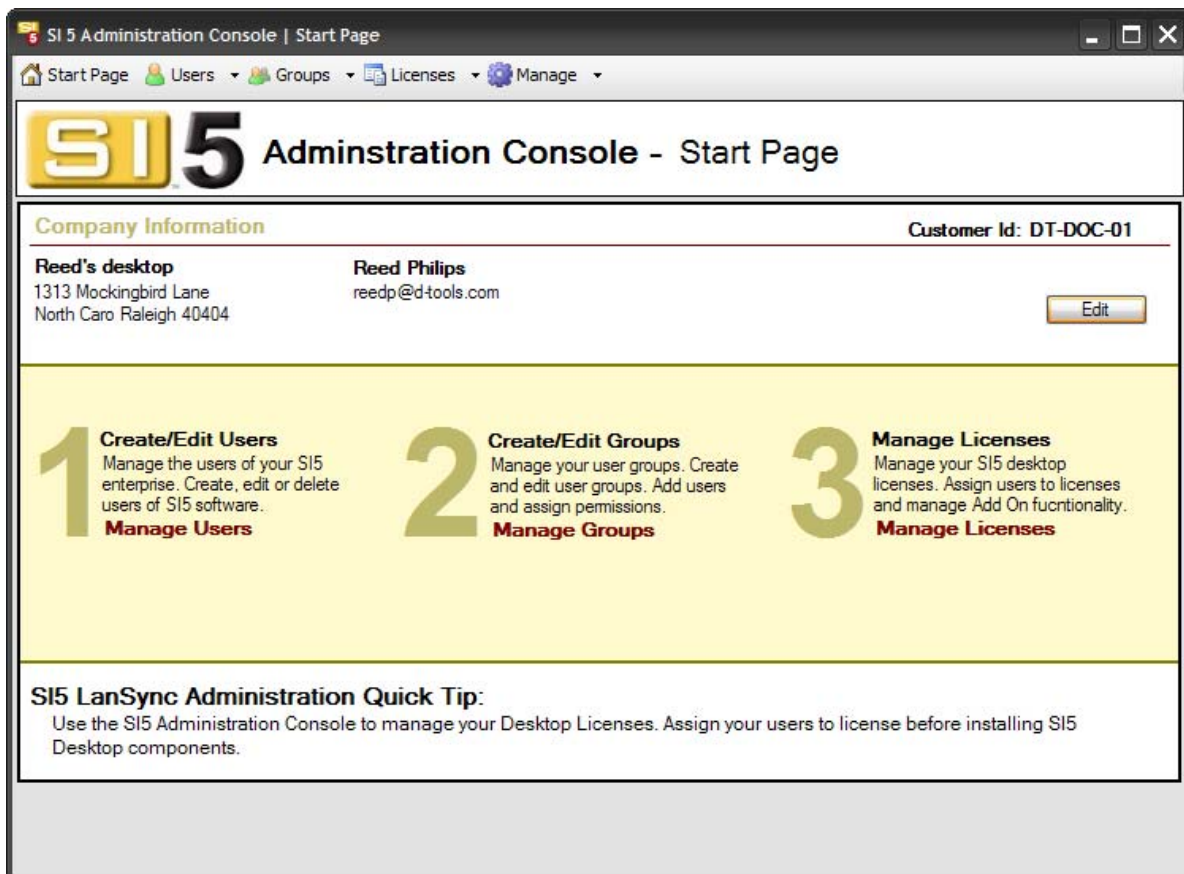
- 1) When you launch the SI 5 Administration console you will be prompted to login. Only an Administrative user will be allowed to login.




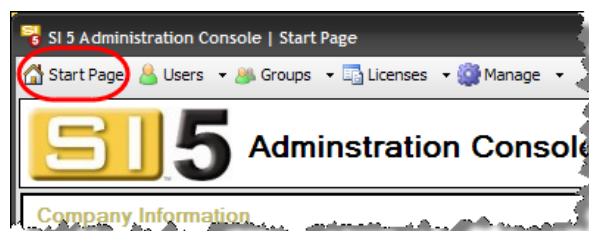
2) Licenses will update:



3) The Start Page displays:

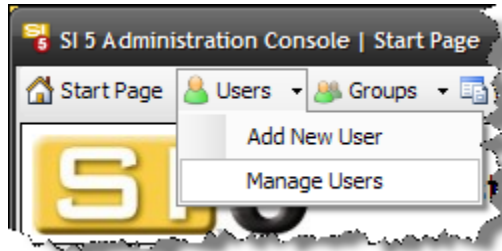


To get back to the Start Page at any time, select  Start Page ...



## Users

Users are managed with the User's dropdown on the Start page.



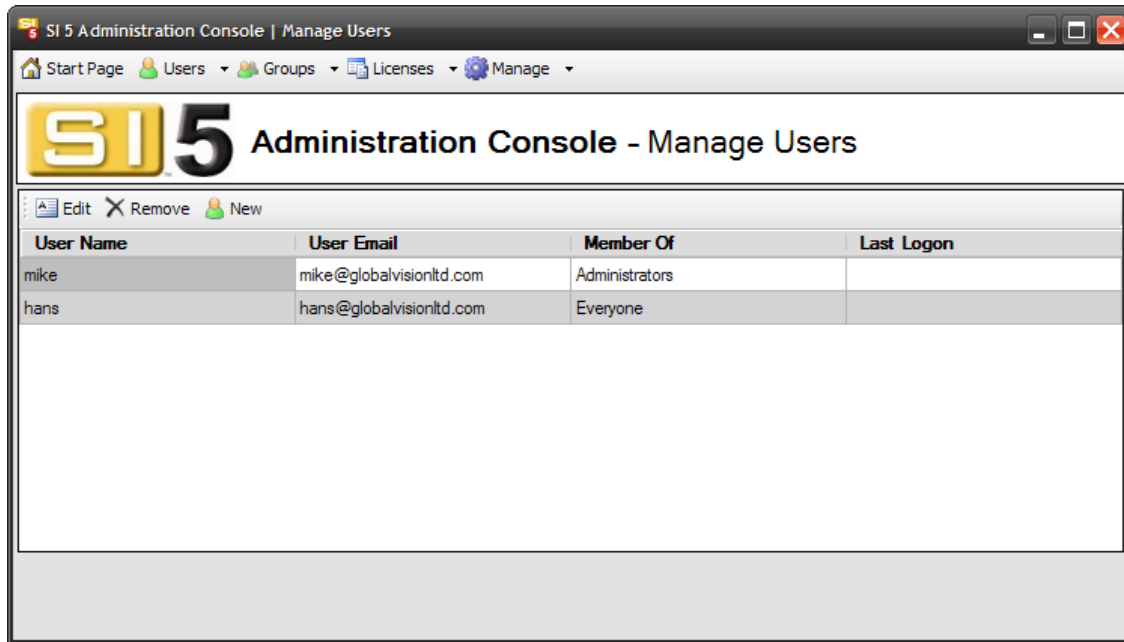
### Add New User

Select "Add New User" and the following form is presented. Email field is required. Don't be concerned about Group assignment. You will assign the Users to appropriate Groups in the "Manage Groups" section later in this chapter.

A screenshot of the SI 5 Administration Console Add/Edit User form. The form is titled 'SI 5 Add/Edit User'. It contains several input fields: 'First Name', 'Last Name', 'Email', 'User Name', 'Password', and 'Confirm Password'. Below these fields are two dropdown menus for 'Group' (currently set to 'Administrators') and 'Role' (currently set to 'Sales'). At the bottom of the form are 'Cancel' and 'Save' buttons.

## Manage Users

- 1) Click the triangle next to **Users** and select **Manager Users**.
- 2) The following form will appear:



User Name	User Email	Member Of	Last Logon
mike	mike@globalvisionltd.com	Administrators	
hans	hans@globalvisionltd.com	Everyone	

- 3) Use the **[Edit]** and **[Remove]** buttons to manage existing Users or use **[New]** to create a new User. When you click **[New]**, the Add/Edit User form opens:



First Name :

Last Name :

Email :

---

User Name :

Password :

Confirm Password :

---

Group :

Role :

- 4) Fill in all fields and then click **[Save]**. Role is for your reference only. It is not used elsewhere in SI 5. Don't be concerned about Group assignment at this time. You will create Groups and assign users to those groups in the next step.

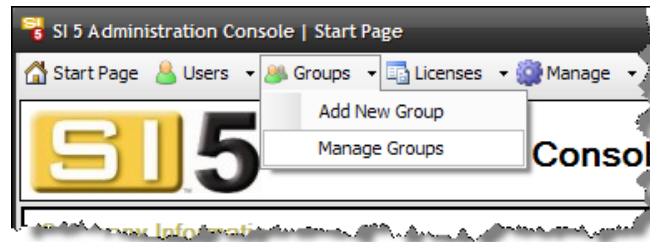


## Groups

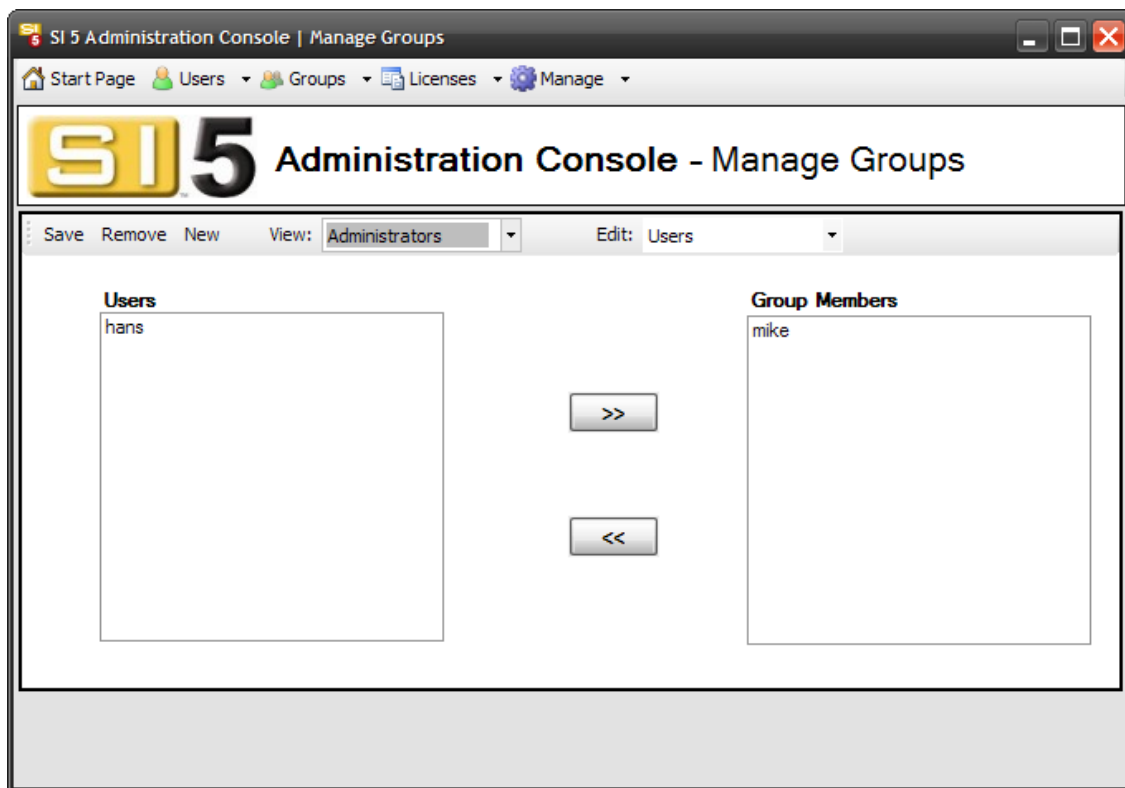
Create Groups to more efficiently manage user rights. Typical Groups could include Sales, Engineering, Accounting, and Installation.

## Manage Groups

To manage your Groups, click **Manage Groups** on the **Start Page**.

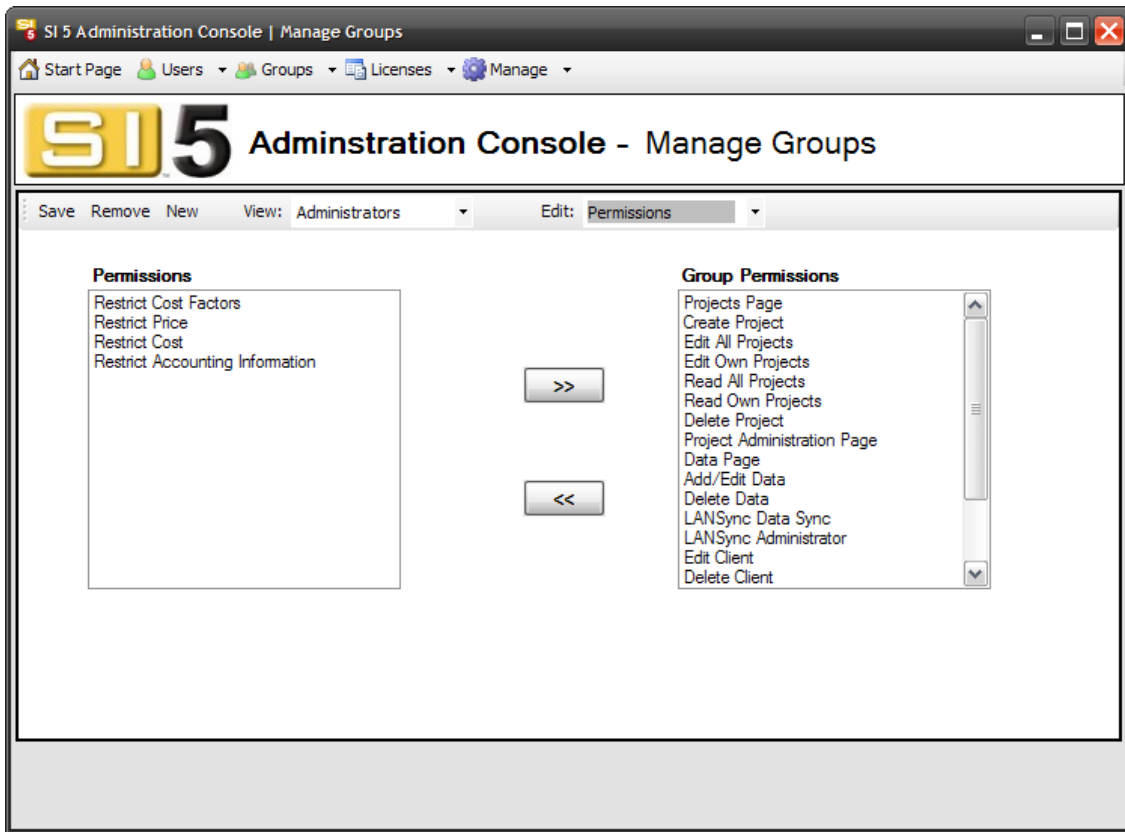


The following screen displays:



*SI 5 comes pre-set with two Groups: Administrators and Everyone. To modify the permissions for any Group, select the Group from the "View" dropdown and select "Permissions" from the Edit dropdown. Use the [>>] and [<<] buttons to modify the existing permissions. To assign Users to a Group, select the Group from the "View" dropdown and select "Users" from the Edit dropdown. Use the [>>] and*

*[<<] buttons to add/remove Users. Click **[Save]** to save changes to a Group, **[Remove]** to delete a Group.*



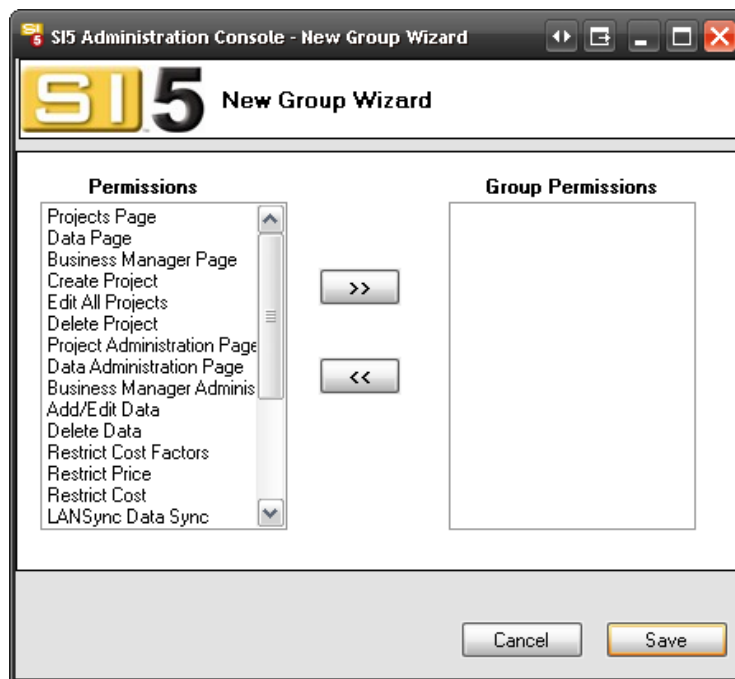
To create a new Group, click **[New]**. You will be prompted to enter a Group Name:



Click **[Next>]** and you will be prompted to add Users to the Group:



Add Users with the **[>>]** and **[<<]** buttons and then click **[Next>]**. You will then be prompted to add Group Permissions:



*Care should be taken when assigning permissions. Most permissions Grant Rights. However, a few cost and accounting permissions Restrict Rights.*

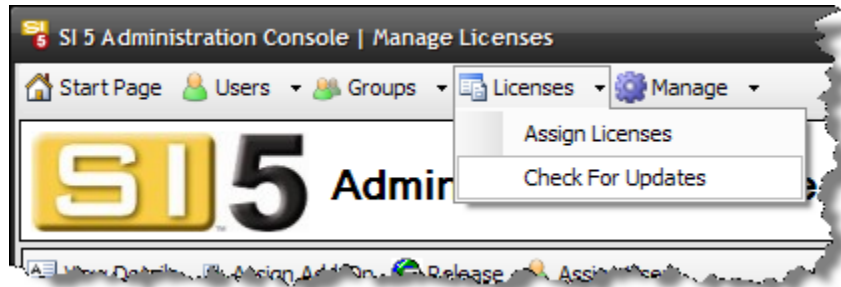
Permission	Behavior
Projects Page	Grants access to the Projects tab of the Navigator
Create Project	Grants access to create a Project
Edit All Projects	Grants access to edit ANY Project
Edit Own Projects	Grants access to only those Projects created by the user
Read All Projects	Grants access to read/view Projects
Read Own Projects	Grants access to read/view only those Projects created by the user
Delete Project	Grants right to delete Projects
Project Administration Page	Grants access to Project Set-up Page in Navigator
Data Page	Grants access to MMPD
Add/Edit Data	Allows user to add and edit data to the database. This could occur via MMPD or during project creation
Delete Data	Allows user to delete data from the Database
LANSync Data Sync	Allows modifications to the local database to update the shared master database
LANSync Administrator	Allows user access to the LANSync administration page. The user will still need to know the administrator password.
Edit Client	Allows user to edit clients in the client table
Delete Client	Allows user to delete a client from the client table
Data Administration Page	Allows user to Compact master database, Backup master database or Restore master database.
Business Manager Admin Page	Allows user to administer Business Manager
Business Manager Page	Allows user access to Business Manager functionality
Create Custom Reports	Allows user to generate and install custom reports

Permission	Behavior
Run Excel Reports	Allows user to run Excel reports.
Restrict Cost Factors	Restricts user from modifying global cost and price factors (see Navigator > Setup > Price in the SI 5 User Guide)
Restrict Price	Restricts user from modifying the price of a Product in the database
Restrict Cost	Restricts user from modifying the cost of a Product in the database
Restrict Accounting Information	Restricts user from modifying Tax Codes and Rates

Once you've added the Group Permissions, click **[Save]**.

## Licenses

To manage licenses select the dropdown as show below.







This allows you to add additional functionality to your main license, in this case SI 5 Professional. You can “Add-On” a license to SI 5 Text, SI 5 Standard or SI 5 Professional. Add-On licenses include Business Manager and LinkTools.

**Manage Licenses: Assign Add Ons**

**Selected License:** SI5 Professional ( 62 )

Please select from the list of available Add On Licenses to attach to this License.

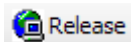
	Id	Name	License Type
<input checked="" type="checkbox"/>	67	SI5 LinkTools	AddOn
<input checked="" type="checkbox"/>	63	SI5 Buisness Manager	AddOn
<input type="checkbox"/>	60	SI5 Buisness Manager	AddOn

[Learn About: Add On Licenses](#)

Cancel Update



*“Learn About” links are found throughout the Administration Console interface. Consider these links as mini-FAQs. They will answer many of the questions you may have about the interface.*



..... Allows the administrator to release a license that cannot be checked in. A “Release” may be required if the computer is lost, stolen or becomes unusable while SI 5 is checked out. If this is the case you will need to contact D-Tools for a release code. The release code provided by support will be entered in the form below.

**ReleaseLicense**

**Release License**

**Please enter your release code.**

If you do not have a release code, please contact D-Tools Customer Support.

A release code is required only in circumstances where a license is “locked” and can not be used by another user. For example, a user logs into SI5 on a computer that breaks or is lost. To assign or unassign a user to a license, close this window, and click the “Assign Users” button.

Release Code:

Release



This is where you assign licenses to Users.

- 1) Select the license to be assigned from the following form. In this example we selected SI5 Text.

The screenshot shows the 'SI 5 Administration Console - Manage Licenses' window. A table lists various licenses. The row for 'SI5 Text' (Id 66) is highlighted with a red oval.

Id	Parent	Name	Status	Current User	Last Login	Type	Install
65	65	SI5 Standard			None	Client	Network
66	66	SI5 Text			None	Client	Network
62	62	SI5 Professional	---		None	Client	Network
63	62	SI5 Buisness M...	---		None	AddOn	Network
59	59	SI5 Professional			None	Client	Network
60	59	SI5 Buisness M...			None	AddOn	Network
67	67	SI5 LinkTools			None	AddOn	Network

- 2) Then click "Assign Users" and the following form will appear. Select the user(s) to grant access to this license. Yes, you may assign multiple users to a single license, but ONLY one user at a time may have the license Checked Out (in use). When finished click **[Save]**.

The form titled 'Manage Licenses: Assign Users' shows the 'Selected License: SI5 Text ( 66 )'. It prompts the user to select from a list of available users. The list shows two users: 'mike' and 'hans'. 'hans' is selected with a checkmark. Below the list is a 'Learn About: Assigning Users' link and 'Cancel' and 'Save' buttons.

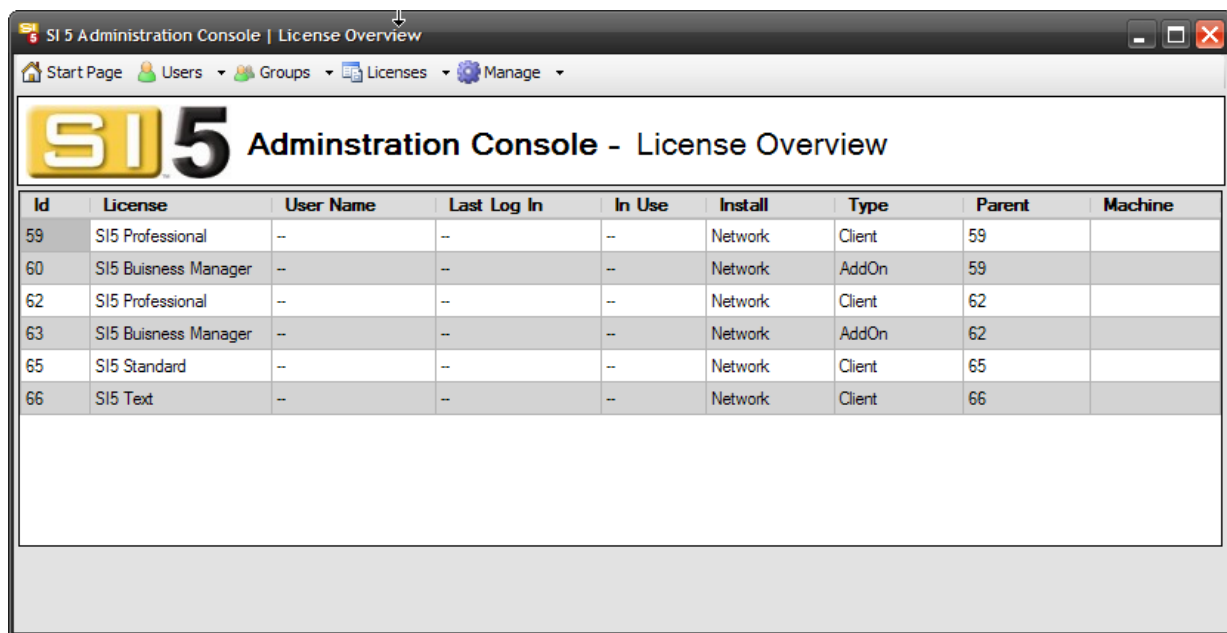
User	Name	Logged In	Last Login
<input type="checkbox"/> mike	Mike	False	6/24/2007 10:01...
<input checked="" type="checkbox"/> hans	Hans	False	6/24/2007 10:01...



*You will notice that "Current User" does not change. Current User tracks Checked Out licenses, not assigned licenses.*



Select **Licenses > Assign Licenses** to see which SI 5 licenses are Checked Out throughout your organization.



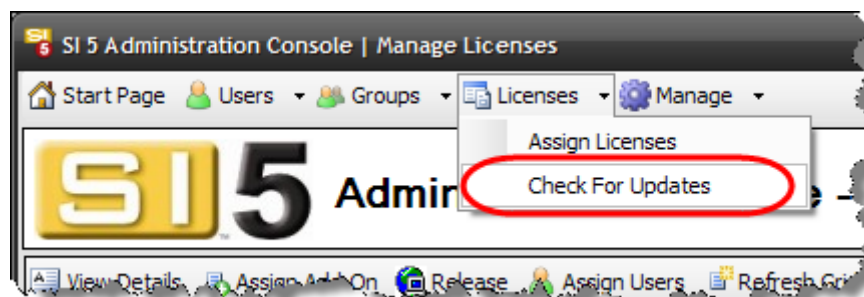
Id	License	User Name	Last Log In	In Use	Install	Type	Parent	Machine
59	SI5 Professional	--	--	--	Network	Client	59	
60	SI5 Business Manager	--	--	--	Network	AddOn	59	
62	SI5 Professional	--	--	--	Network	Client	62	
63	SI5 Business Manager	--	--	--	Network	AddOn	62	
65	SI5 Standard	--	--	--	Network	Client	65	
66	SI5 Text	--	--	--	Network	Client	66	



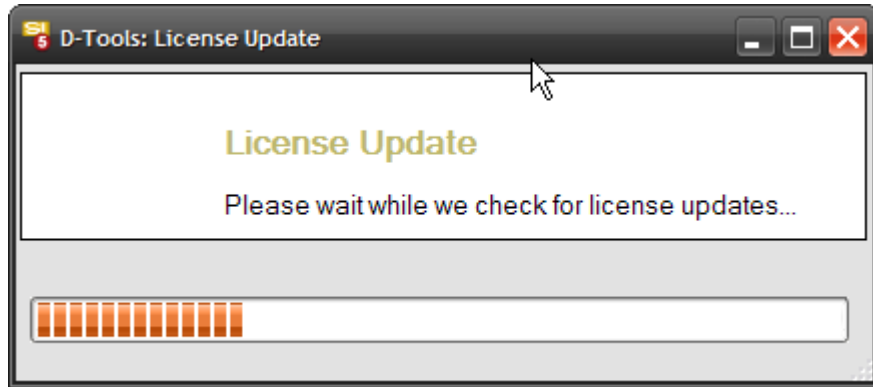
*Just because a license is shown as a “Child” license does not mean that it must be assigned to the same User as the Parent. You may wish to do this to keep your sanity, but it is not required.*

## Check For Updates

If you have recently purchased additional licenses or for some other reason need to refresh your list of licenses click **Licenses > Check For Updates** from the Start Page.



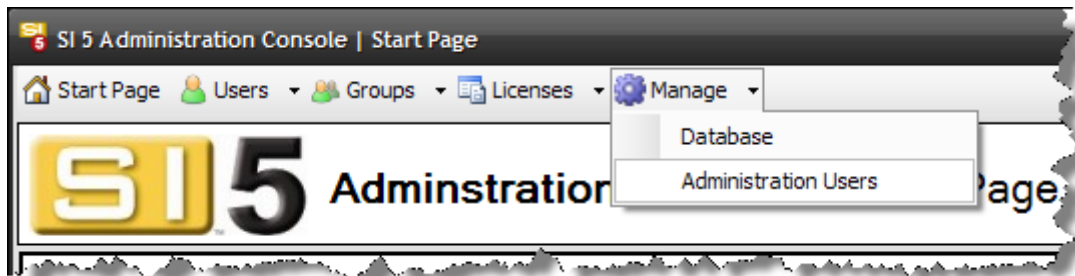
The following activity bar will appear:



Once complete the Grid should refresh. If not, click **[Refresh Grid]**.

## Manage

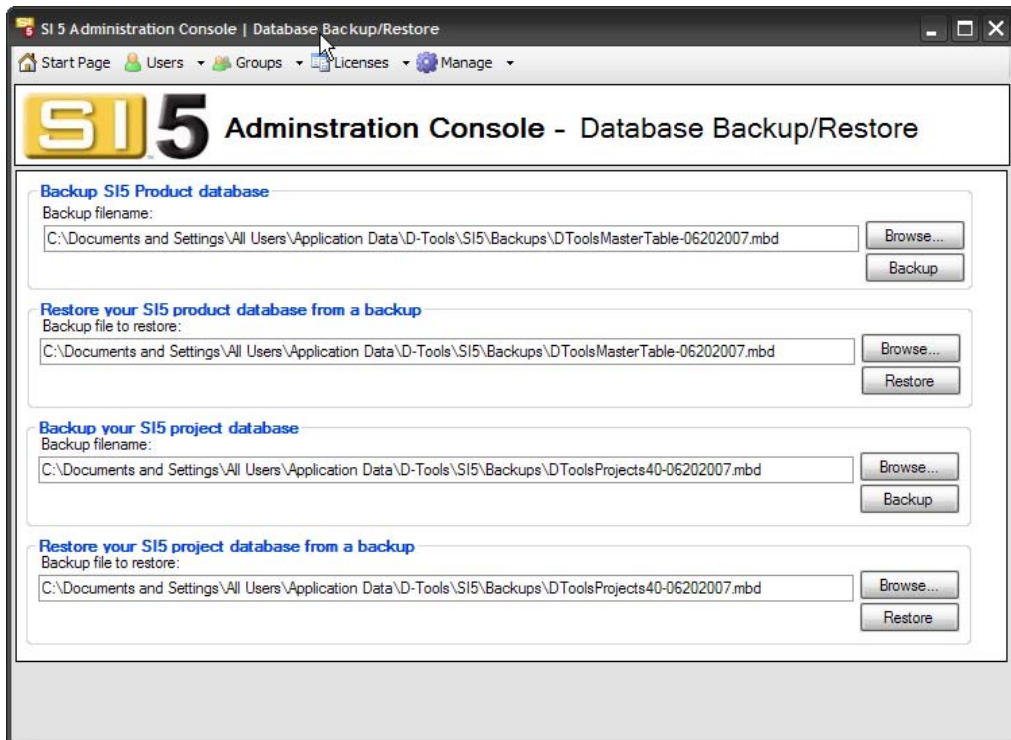
The Manage tab provides some additional tools for Server data and Administration User management.



## Database (Server)

Clicking Manage > Database will provide the following interface for:

- a) Backup SI 5 Server Product Database
- b) Restore SI 5 Server Database from Backup
- c) Backup SI 5 Projects Database
- d) Restore SI 5 Projects Database from Backup



You should make a habit of creating daily backups of your Product and Projects data. Be sure to backup this data to a different physical device. If you are using a dedicated server, it may include software that will automatically backup SQL data.

Backup of Local Project and Local Product data is managed by MMPD. See Backups and Restoring in the SI 5 User Guide.

## Administration Users

Open the following form by selecting **Manage > Administration Users** from the Start Page. This is where you can Add, Delete and Edit users that can have access to the SI Administration Console.

The screenshot shows a web application window titled "SI 5 Administration Console | Manage Administration Users". The window has a navigation bar with links: Start Page, Users, Groups, Licenses, and Manage. Below the navigation bar is a header section with the "SI 5" logo and the title "Administration Console - Manage Administration Users".

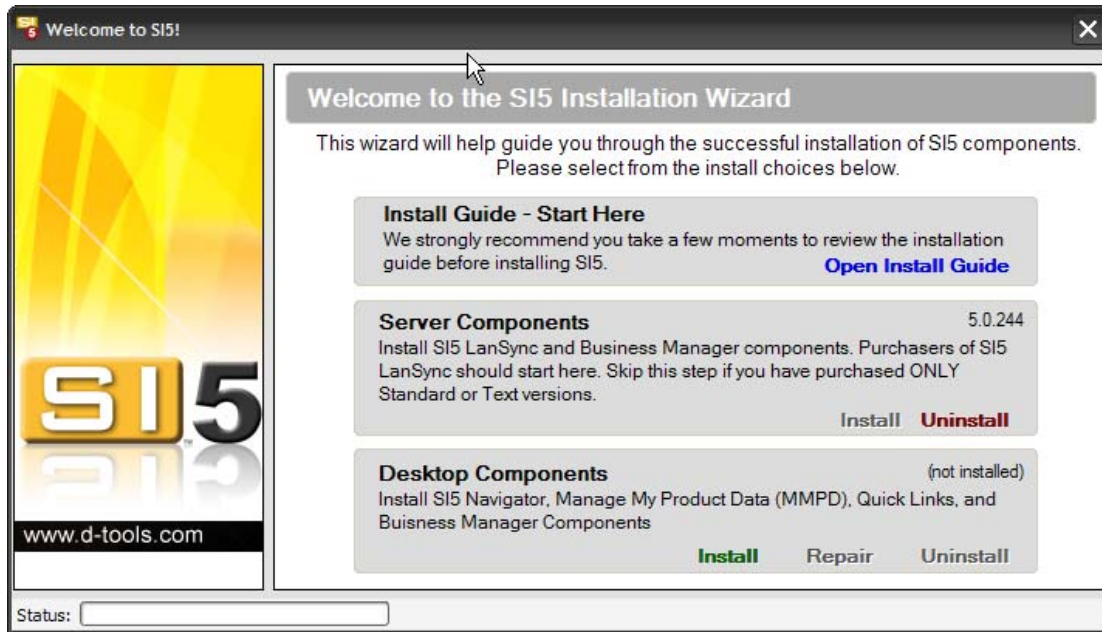
The main content area is divided into two sections. On the left is a form for adding a new user, with fields for "UserName", "Password", and "Confirm Password", and an "Add" button. On the right is a table listing existing users.

User Name	Edit	Remove
admin	Edit	Remove

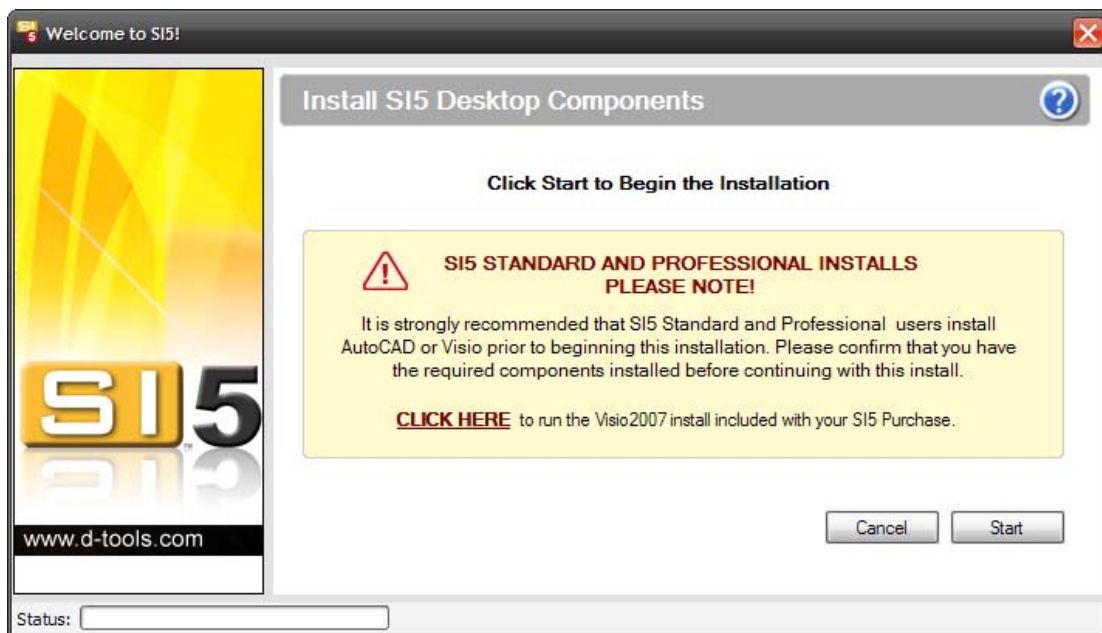
# Installing Desktop Components

**We recommend that you assign users to licenses before installing Desktop Components**

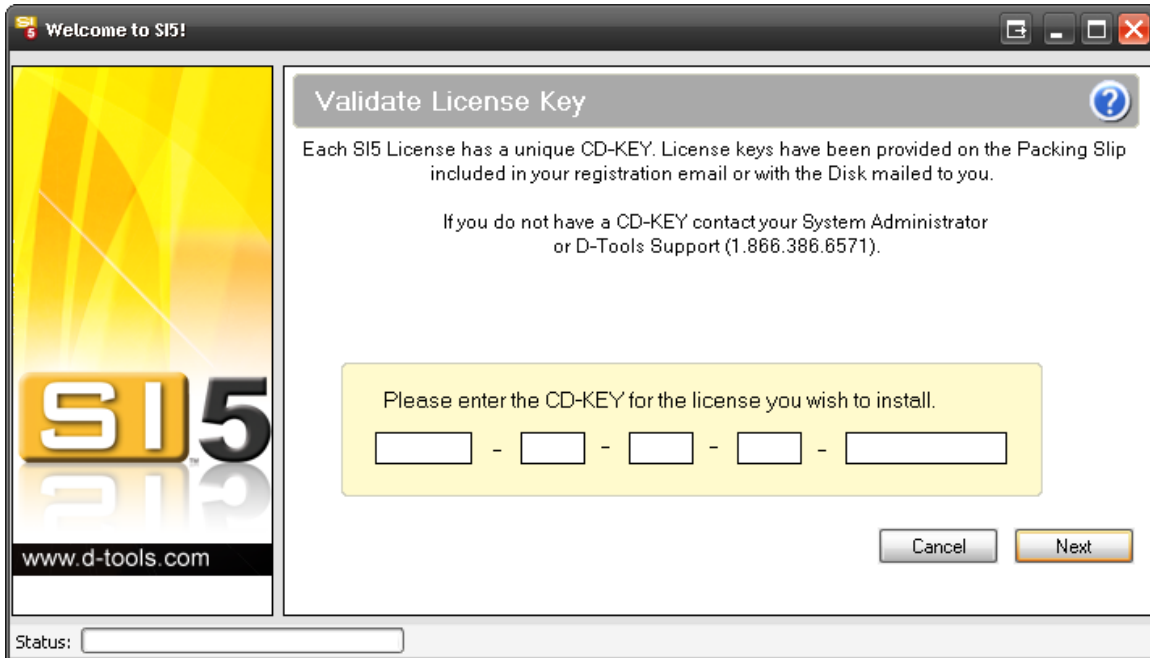
- 1) Clicking **"Install"** in the Desktop Components section begins the process for installing the SI 5 application on your machine:



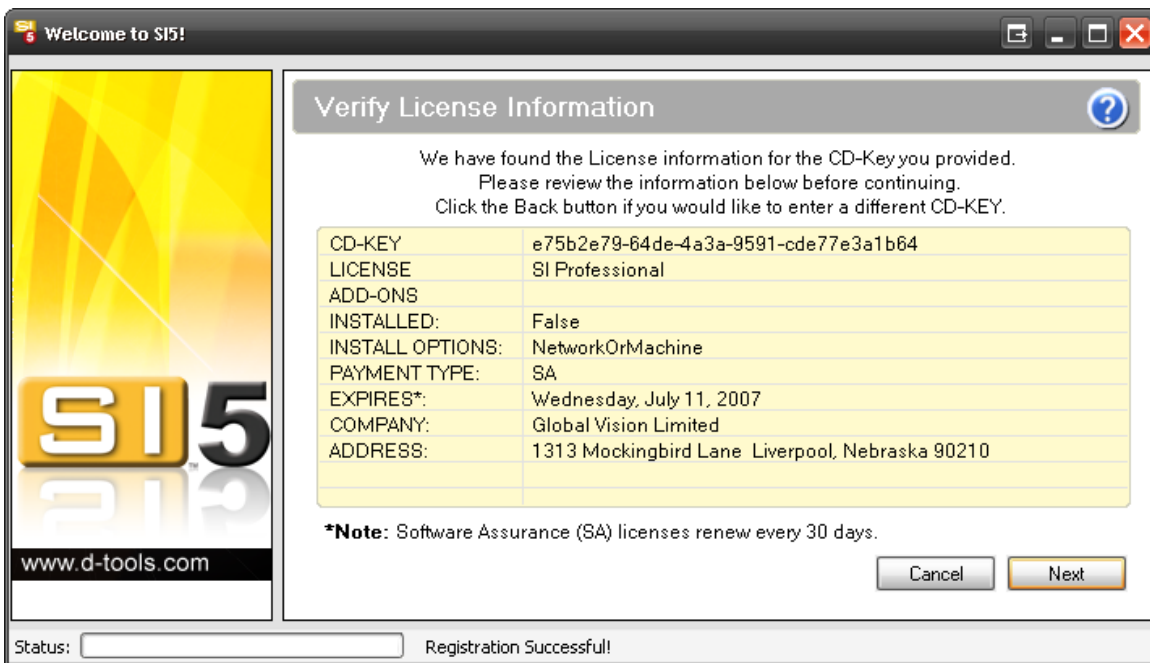
- 2) If you purchased SI 5 Pro or Standard, Visio is included on the CD and should be installed before proceeding. See "Compatibility" for more details.



3) You will first be prompted to enter your CD-Key:

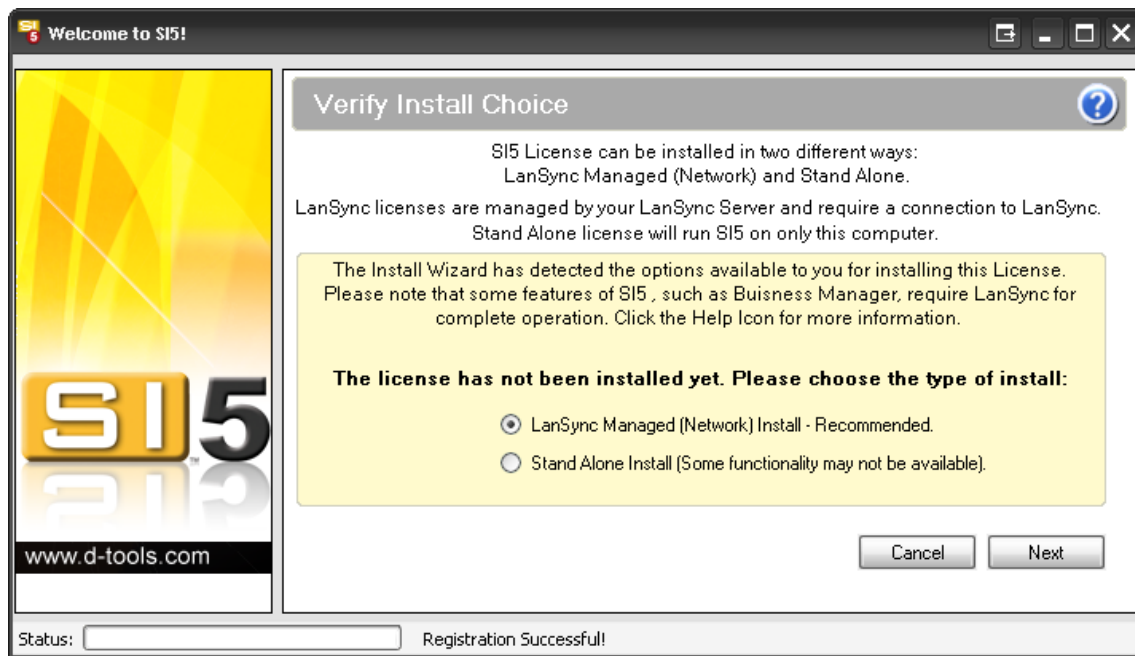


4) Enter your CD-Key and click **[Next]**. You may use any Desktop License CD key you like from the packing slip. You may also use the same key on every machine. You will be prompted to verify your license information:



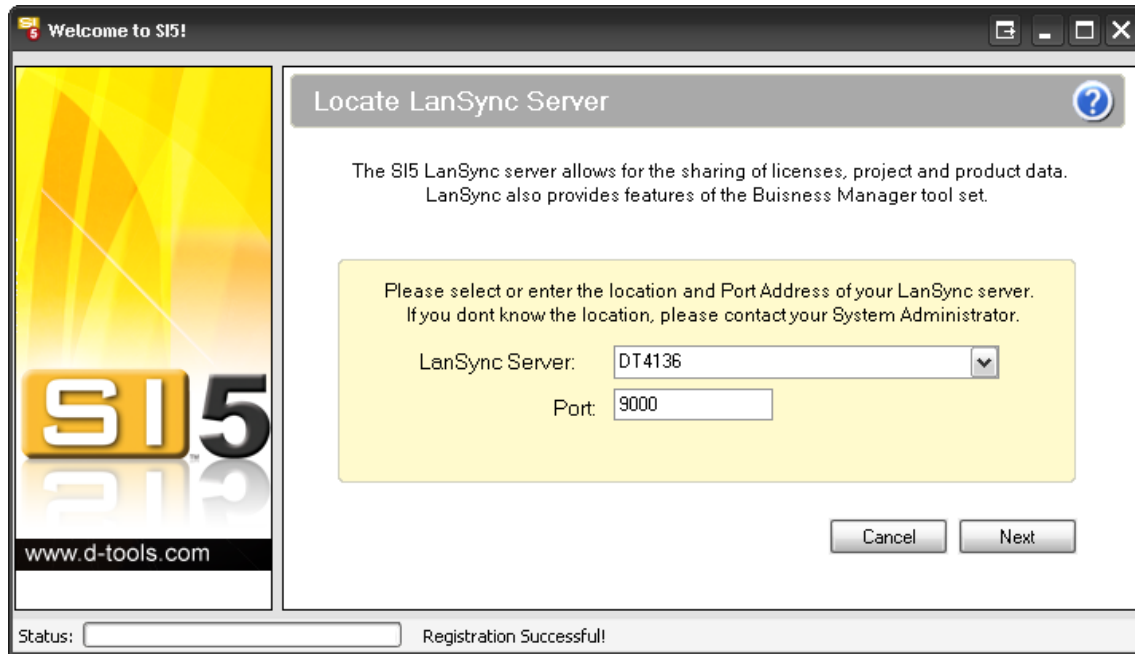
*If you have a lot of users, a) THANKS! and b) you may wish to use a text editor to store the key on a local file share that is accessible from every machine. This will allow you to cut and paste the license key for all future installs.*

- 5) Once you verify that the information is correct, click **[Next]**. You will then be prompted to verify your install choice:

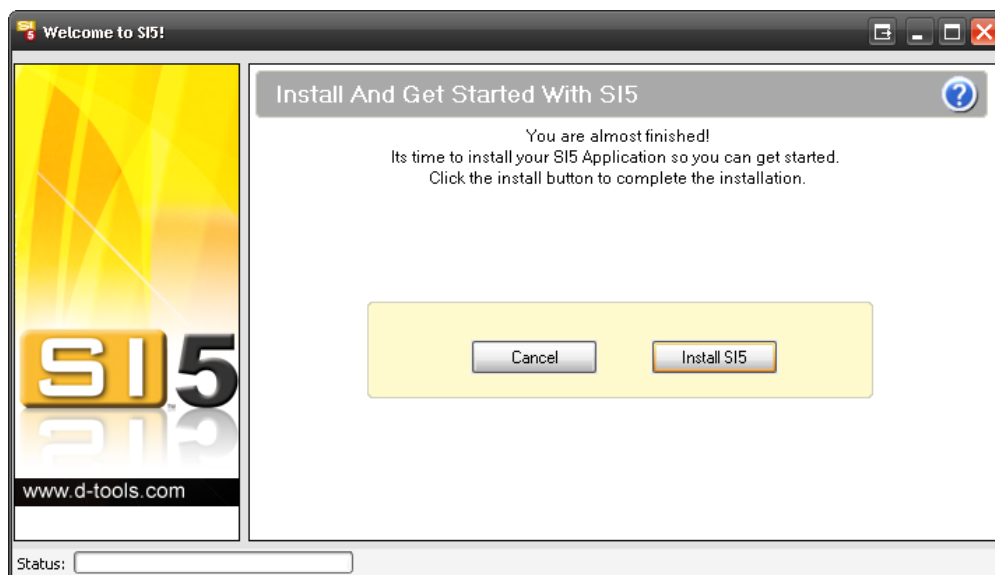


*You should always use the LANSync Managed option if LANSync has been installed. The Stand Alone Install is for individual SI 5 users only that do not wish to share data and projects and do not use Business Manager. If you wish to use Business Manager as a single user, you will still need to install LANSync.*

- 6) You will now be prompted to choose the location of your LANSync server from the dropdown list that will contain a list of all of the machines (by machine name) on your network that have a SQL Server installed. This will most typically be the machine where you ran the SI 5 Server Components install.



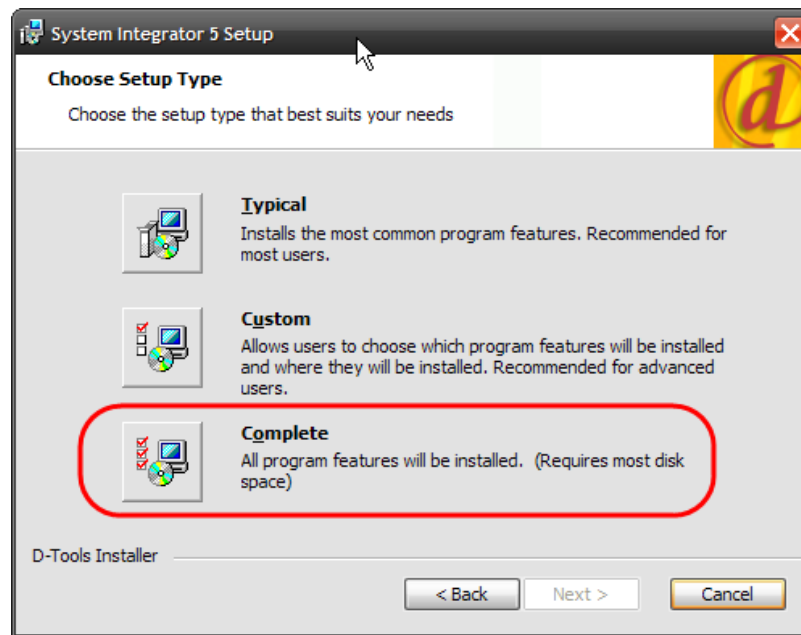
- 7) Choose your LANSync Server location and then click **[Next]**. If you don't see it in the list then you can type in the machine name or IP address.
- 8) You will be prompted to click **[Install SI 5]** to complete your installation:



- 9) Accept the License agreement and click **[Next]**.
- 10) Decide where you want to place shortcuts.



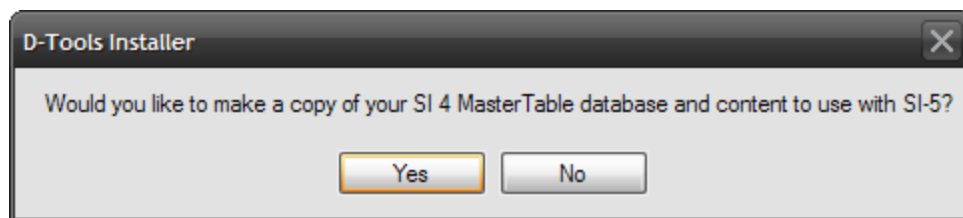
11) Choose the install option. "Typical" installs all components except LinkTools. If you are sure this user will not need LinkTools then use "Typical", otherwise choose "Complete".



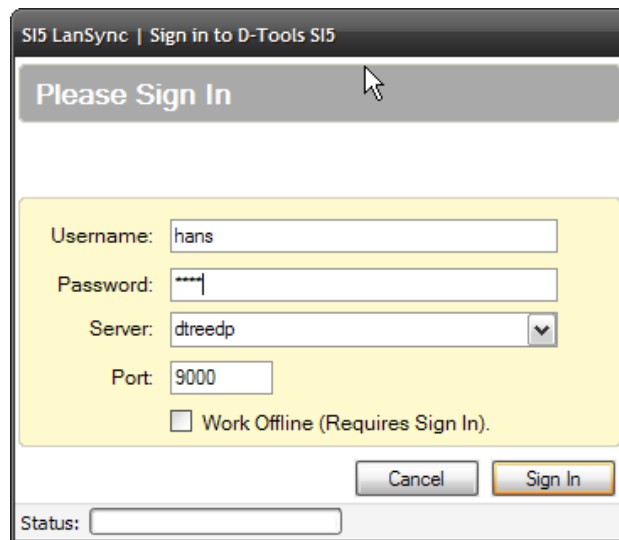
12) Click **[Install]**

13) When you see the following prompt, select **[NO]** if any of the following are true (There is no undo or "Back" for this step):

- a) You installed LANSync and copied the SI 4.6 SQL data to the SI 5 SQL database. You can say yes, but your local data will be overwritten later when you download data from the Server.
- b) You are a new SI 5 user and do not have a SI 4 MasterTable (database).
- c) You are a Beta user that would like to continue to use the data you created during the Beta process.



- 14) If no users have been created, see the chapter on SI 5 Administration. You need a valid User name and that name needs to be assigned to a SI 5 license.



- 15) The SI 5 Navigator will appear.

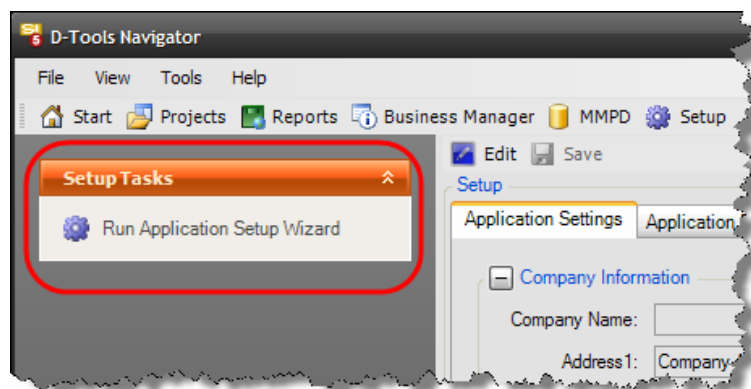


- 16) Refer to the SI 5 User Guide for a complete description of this interface.

# Getting Started

## New Users

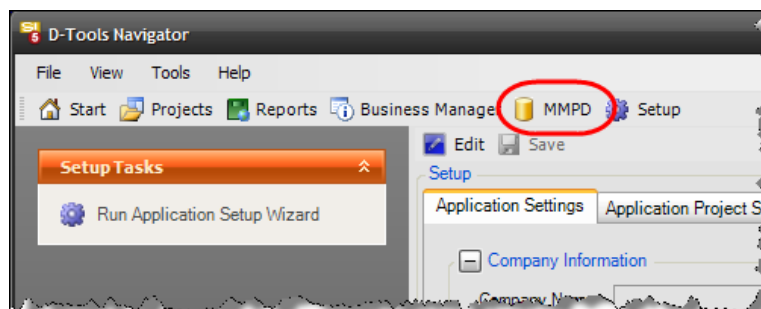
Prior to beginning work with SI 5, we would suggest that you review the “Pre-implementation Guide” chapter in the SI 5 User Guide. Once complete, run the Application Setup Wizard by clicking on the link as shown below.



Next we would suggest that you explore the workings of MMPD, of particular interest will be **Administration > LANSync** tab. This will determine how data is moved between your local machine and the Server. Refer to the SI 5 User Guide for detailed instructions.

## Existing SI 4.6 Users (LANSync)

As part of the installation process hopefully you copied your SI 4.6 SQL data to the SI 5 SQL Server database. If so, the next step would be to download the server data to your local machine by going Launching MMPD from the SI 5 Navigator.



Then click **Administration > LANSync** then **[Copy Down To Local]**. For a complete description of LANSync functionality, see the SI 5 User Guide.

## **SI 5 Beta User**

If you are a LANSync user and transferred your data to the SI 5 SQL Server, you will now need to download the database to each of your local machines. Thanks again for your help with the SI 5 Beta. We look forward to your comments on the forum.