d-tools™
System Integration Software

Sell Design Deliver

System Integrator SI5.5

INSTALLATION & 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 2006-2009 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 user 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/index.php/support/training-sub

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 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,

Adam Stone
President
adam@d-tools.com

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The installation of this program will install files necessary to operate the program onto your computer. Other system files, such as DLLs may be installed or updated and Windows registry entries will be made. Uninstalling the program will not remove all of the installed files or registry entries. As with all installations, it is recommended that you back up your hard drive before you install this program.

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About This Guide

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http://downloads.d-tools.com/si5/documents/training/SI_5_Installation_and_Administration_Guide.pdf

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This document along with the SI 5 Tutorial and the User Guide will help maximize the return on your D-Tools investment. SI 5 is a very feature rich product. If you have specific questions, scan the Table of Contents or look for keywords in the index. If you find we have left out something, please let us know. We are releasing this document in PDF format so that it may be more easily updated as SI 5 continues to evolve. Please give us you feedback. We want to know how we can further improve both our products and our documentation.

Thanks,

The SI5 Documentation Team

System Requirements

Hardware requirements

2 GHz Pentium 4 (Dual Core Processors recommended)

1 GB RAM (2 GB is recommended)

CD drive (DVD drive is recommend for future compatibility)

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

OS Requirements

Microsoft Windows XP with SP2 or later

Microsoft Windows Vista

Microsoft Windows 7

Microsoft Server 2003

Microsoft Server 2005

Will work with both 32-bit and 64-bit operating systems running on a PC.

Windows Required Components

Windows Installer 3.1 (this likely already on your machine but if not Click here to download)

.Net Framework 3.5 SP1 (Included on CD, will be installed during SI 5 install)

SQL Server Compact 3.5 SP1 (Included on CD, will be installed during SI 5 install)

Compatibility

SI 5 is compatible with the following third party applications:

Microsoft Visio 2003 & 2007*

Microsoft Office 2007

Microsoft Project 2003 & 2007

AutoCAD** 2006-2010

QuickBooks Pro/Premier

(US 2006-2010, CAN 2006-2008, UK 2005, 2008)

QuickBooks Enterprise (US 7-9)

*Visio Standard 2007 included on disk

** Only 32-bit versions of AutoCAD. To work with AutoCAD, your Operating System must be 32-bit as well, AutoCAD does not run in WOW mode on 64-bit machines. Must be Full version of AutoCAD.

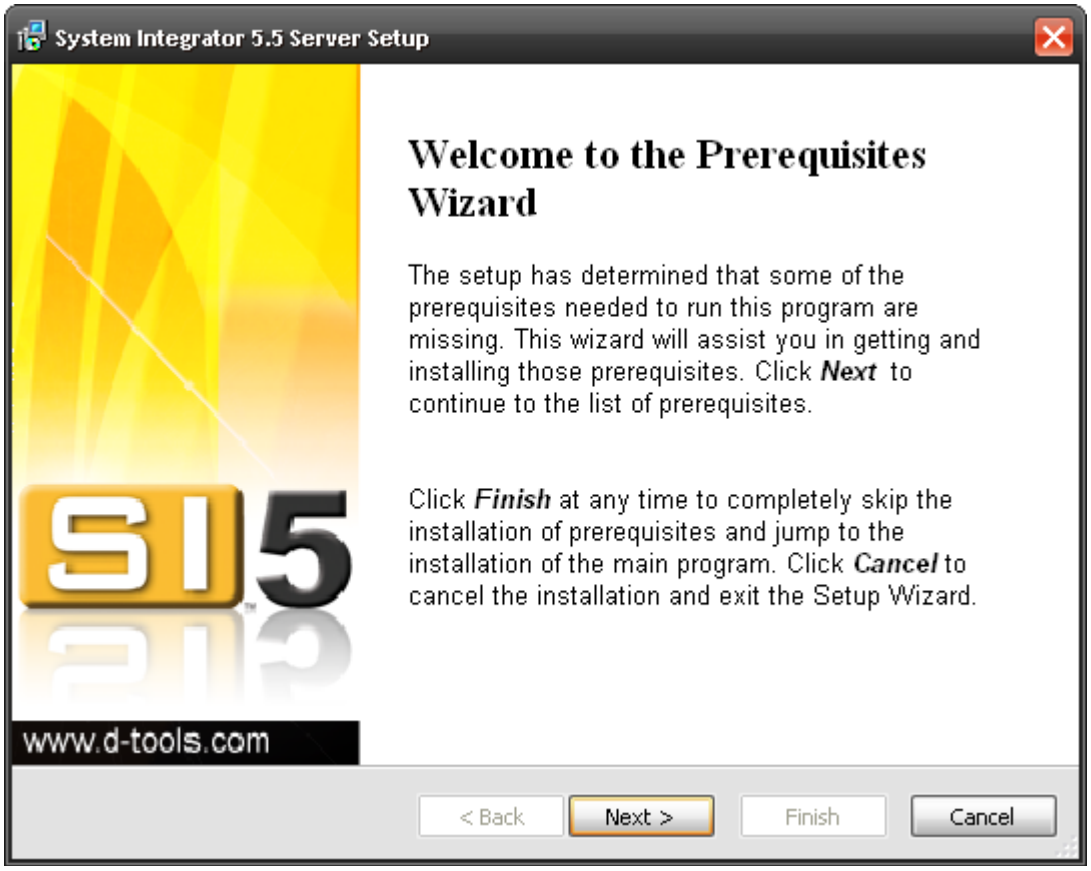
If applicable, please install the third party drawing software you plan to use prior to installing SI 5. A license to Visio 2007 Standard is included on your install disc. You will find the installer located inside the Visio2007 folder on the SI 5 CD, or CD image

Installing the SI5.5 Server

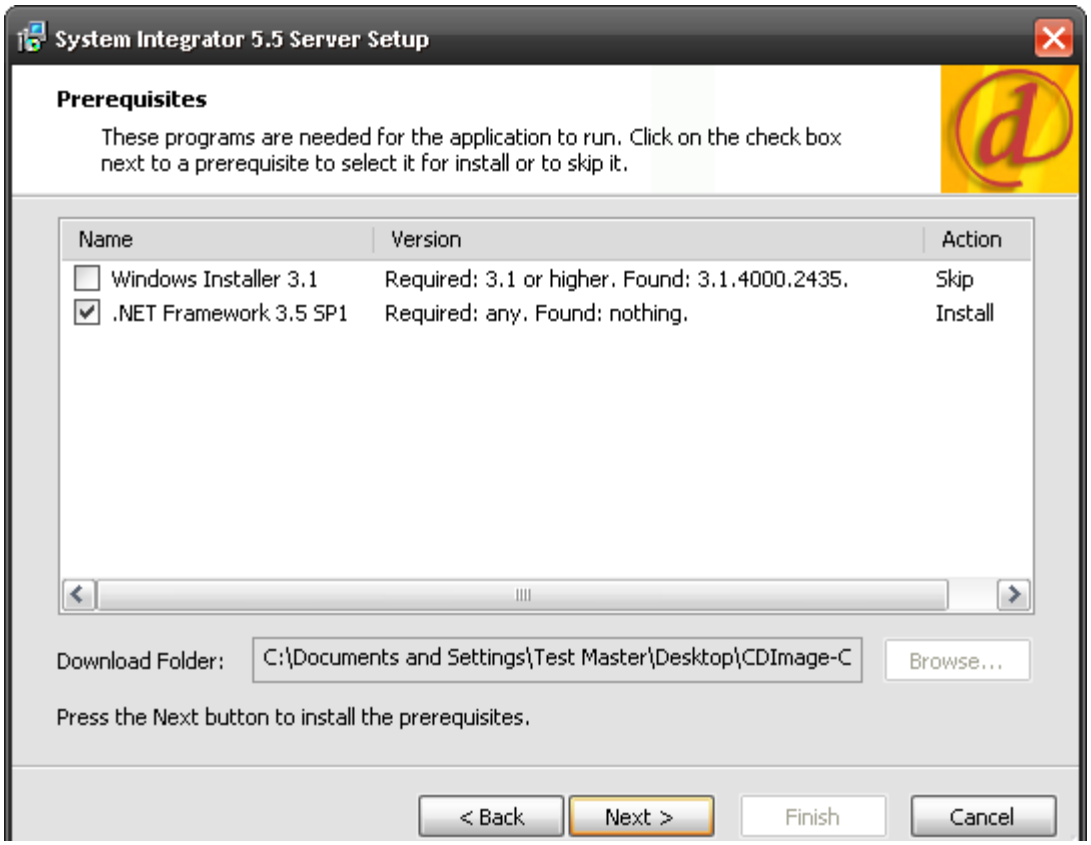
1) Insert disc into CD or DVD drive.

2) If the installation process does not automatically begin, browse to the CD drive and Double-click the *Install.hta* file. The D-Tools System Integrator 5.5 install from will open. Choose **Install System Integrator 5.5 Server**.

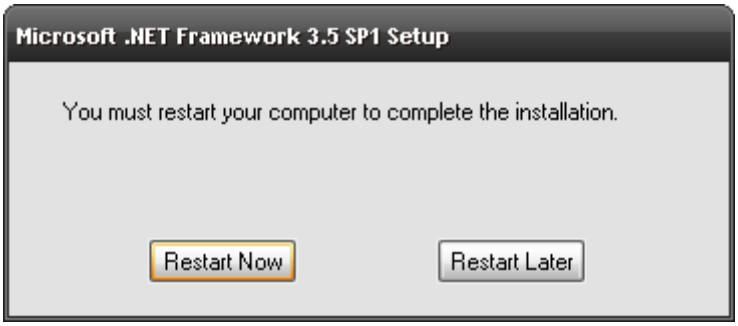
3) The installer will determine if all prerequisites are installed. Click **[Next >]**.



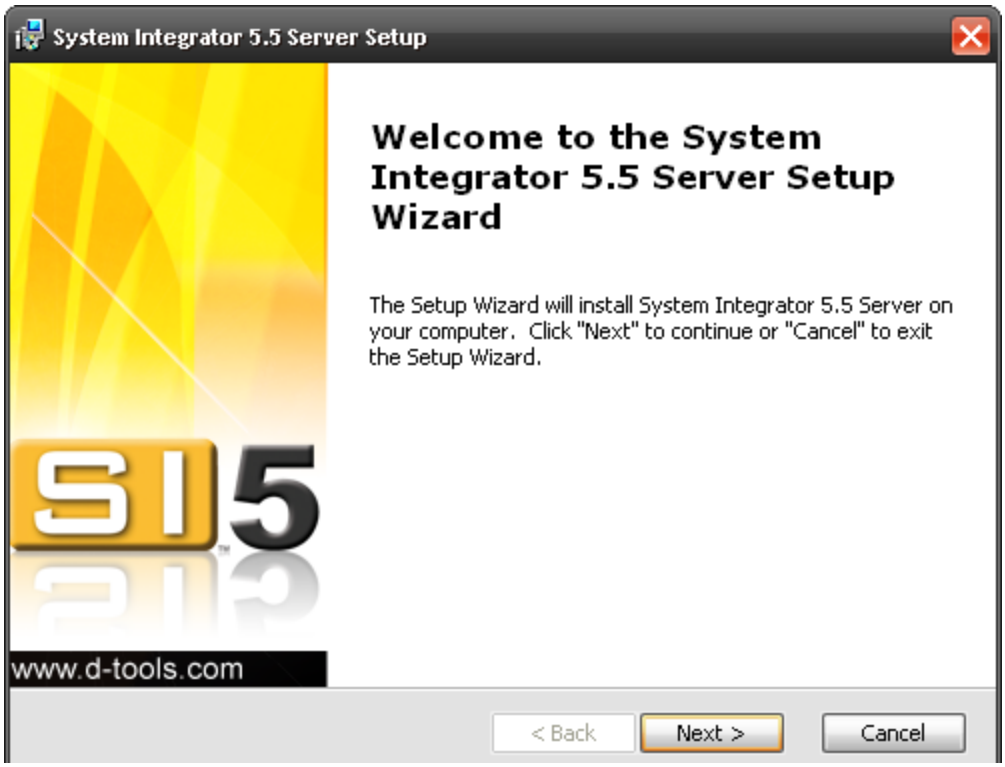
4) Click **[Next >]** to install any missing prerequisites. Follow the onscreen instructions for the third-party installs.



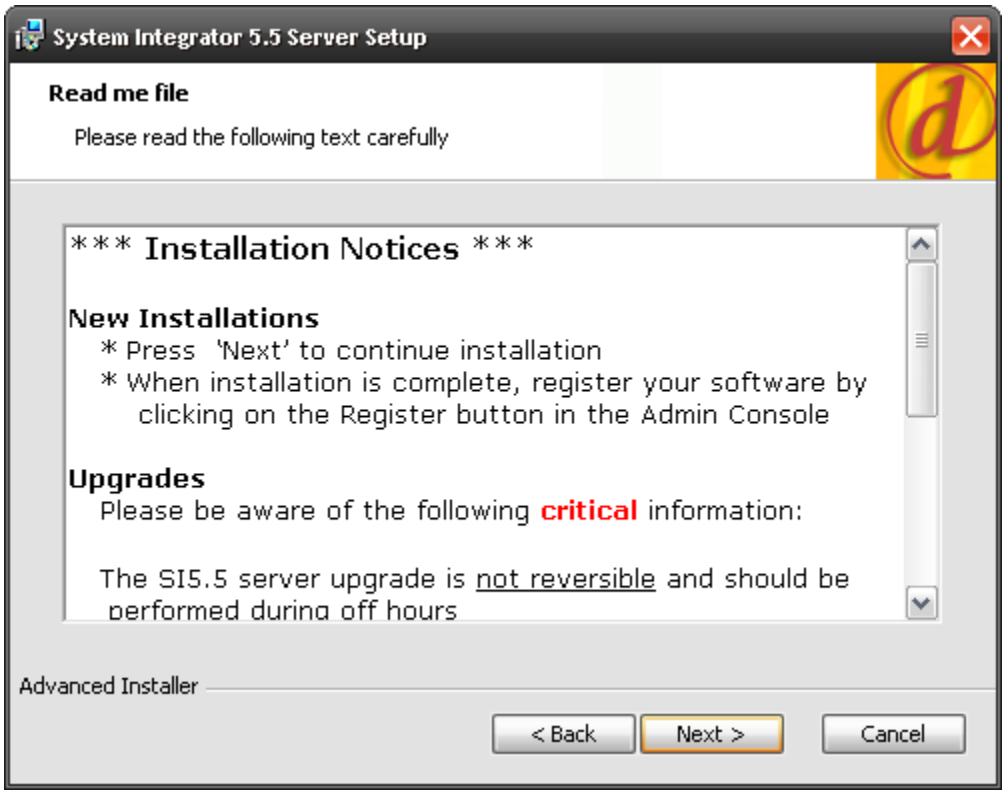
You may be required to restart your PC after the prerequisites install



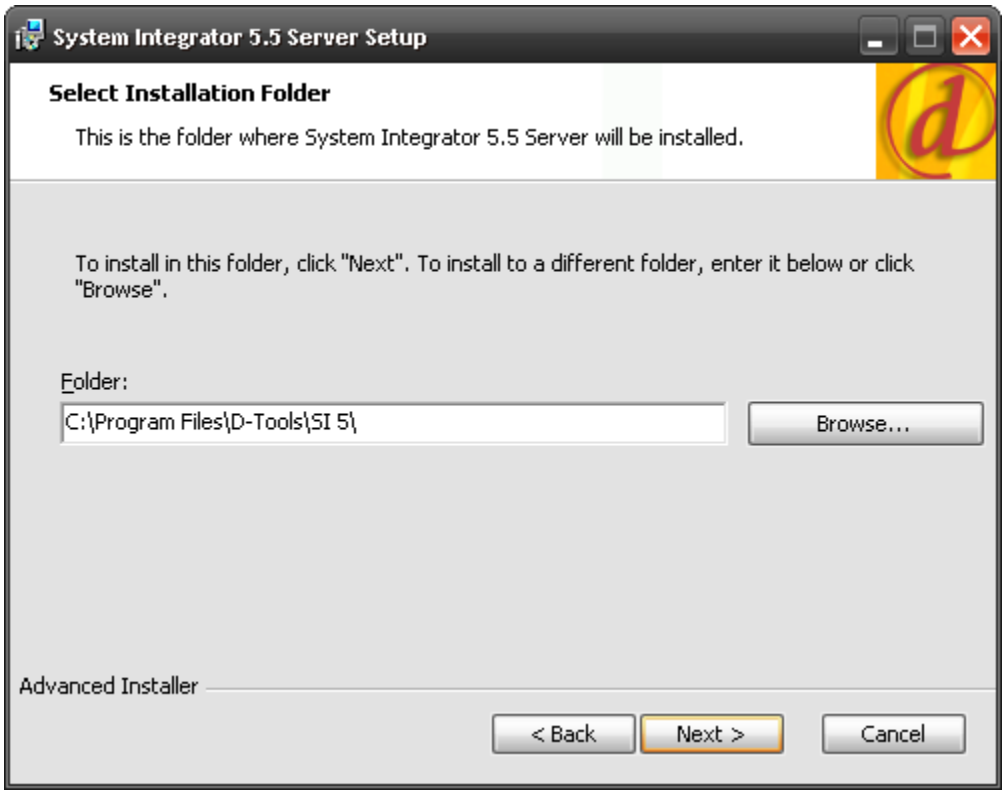
5) When your PC restarts, the installation for SI 5 will continue automatically. Click **[Next >]** to proceed.



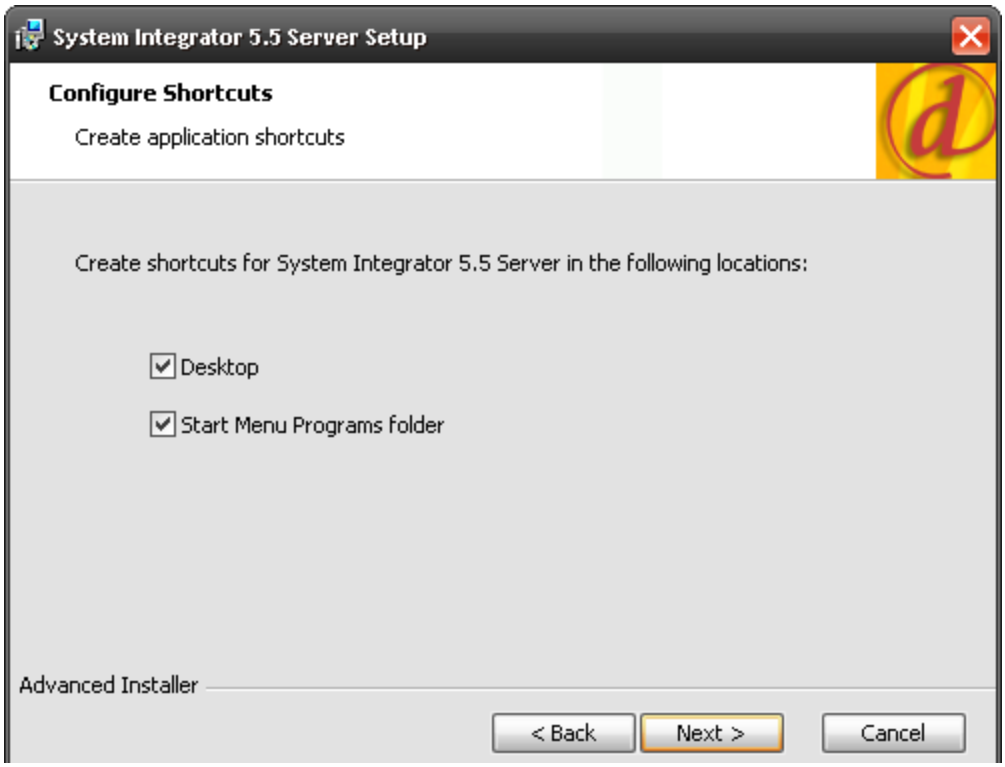
6) The “Read me” file will display. Read through this and then click **[Next >]**



7) We recommend leaving the default install folder but you may choose a specific directory if you desire. Click **[Next >]** to proceed.

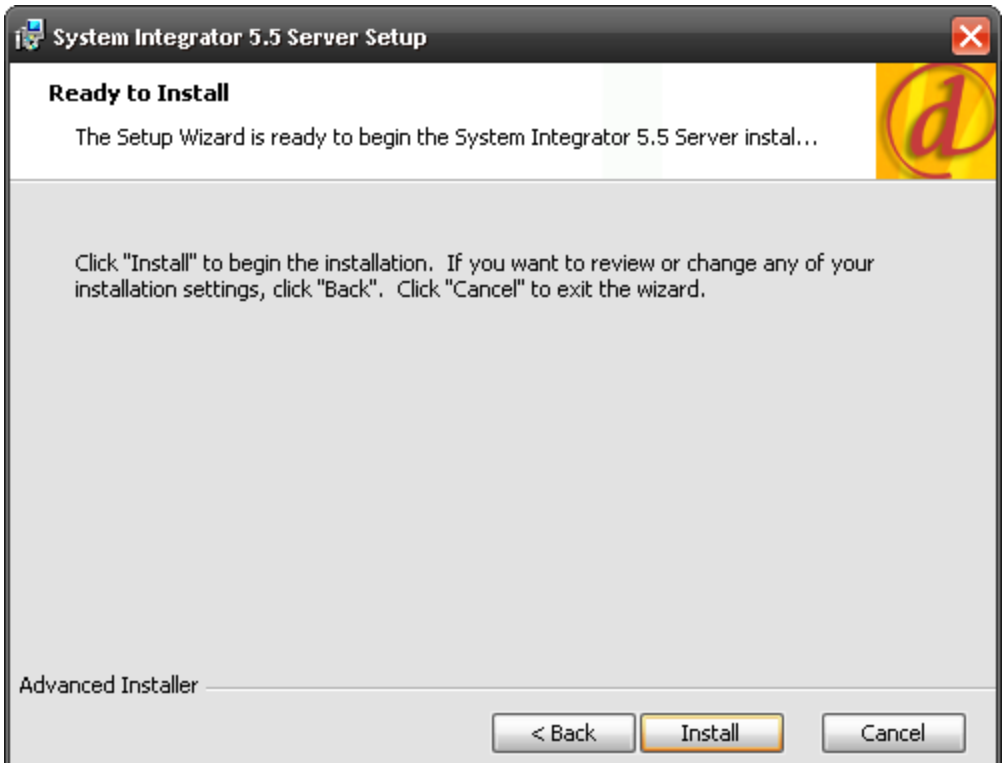


8) Click **[Next >]** on the Configure Shortcuts step:

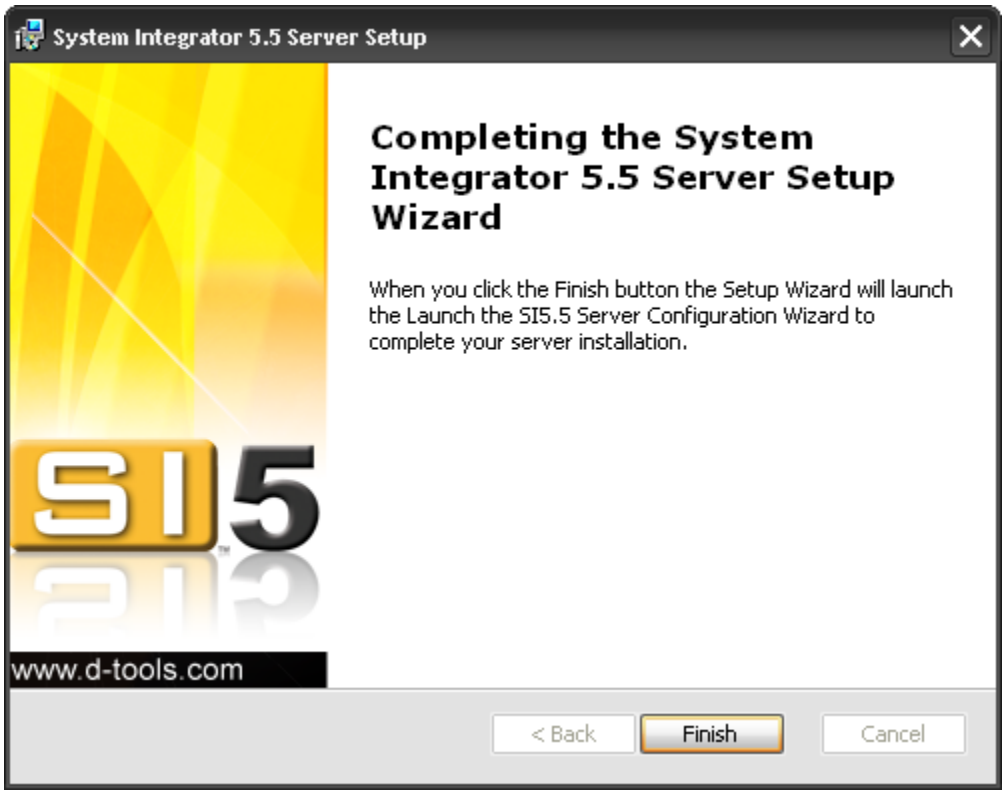


9) Read and Accept the End-User License Agreement and then click **[Next >]**

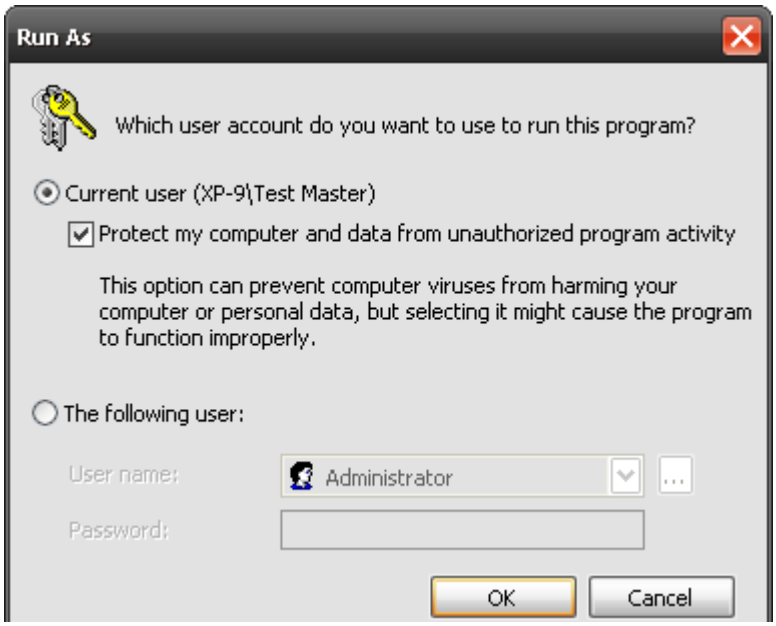
10) Confirm you decision to install by clicking **[Install]**



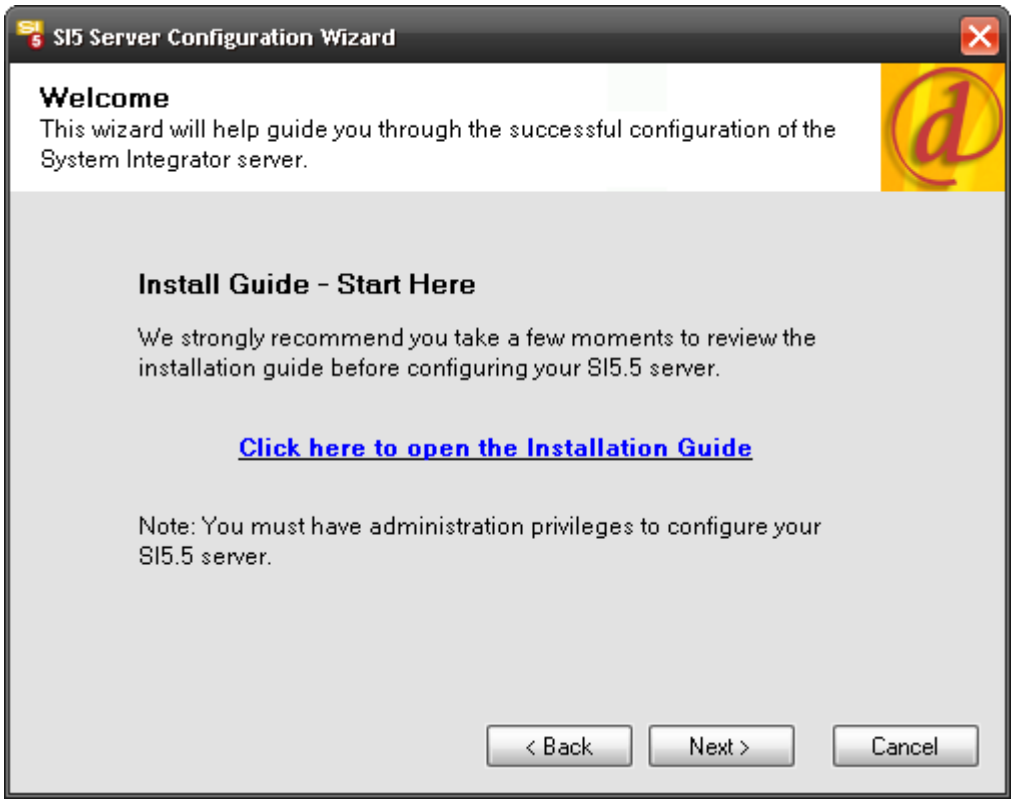
11) The install will complete. You must now configure your server (steps follow). Click **[Finish]**



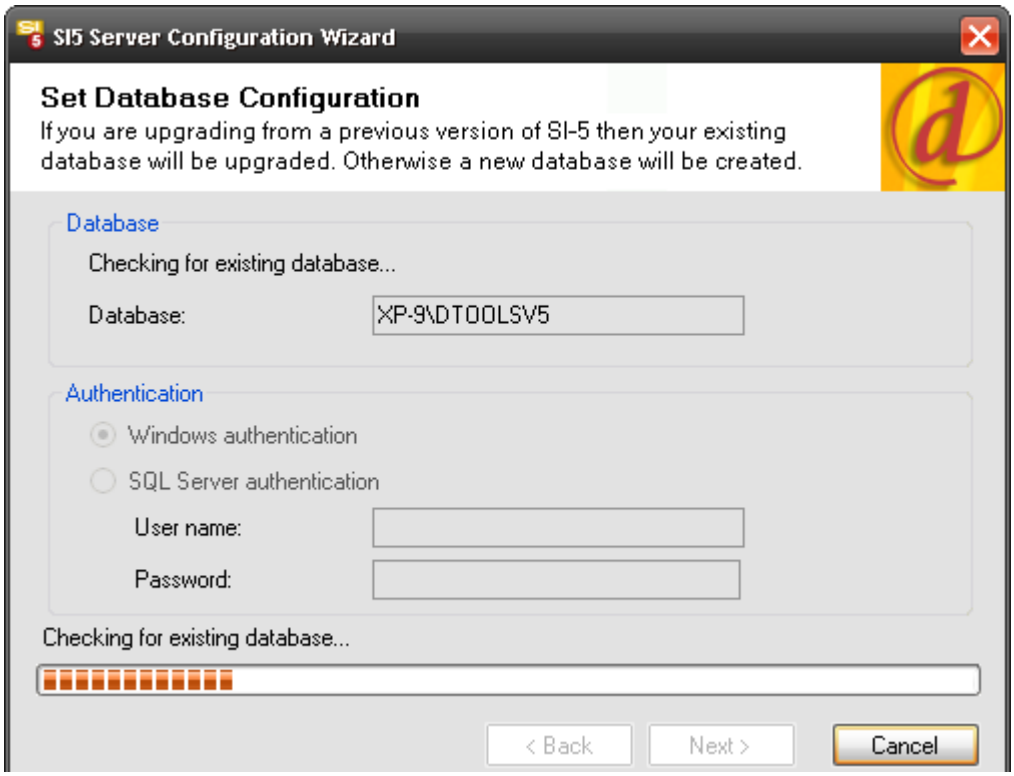
12) Choose your "Run As" option. We recommend leaving this set to "Current user". **DO NOT** click **[Cancel]**.



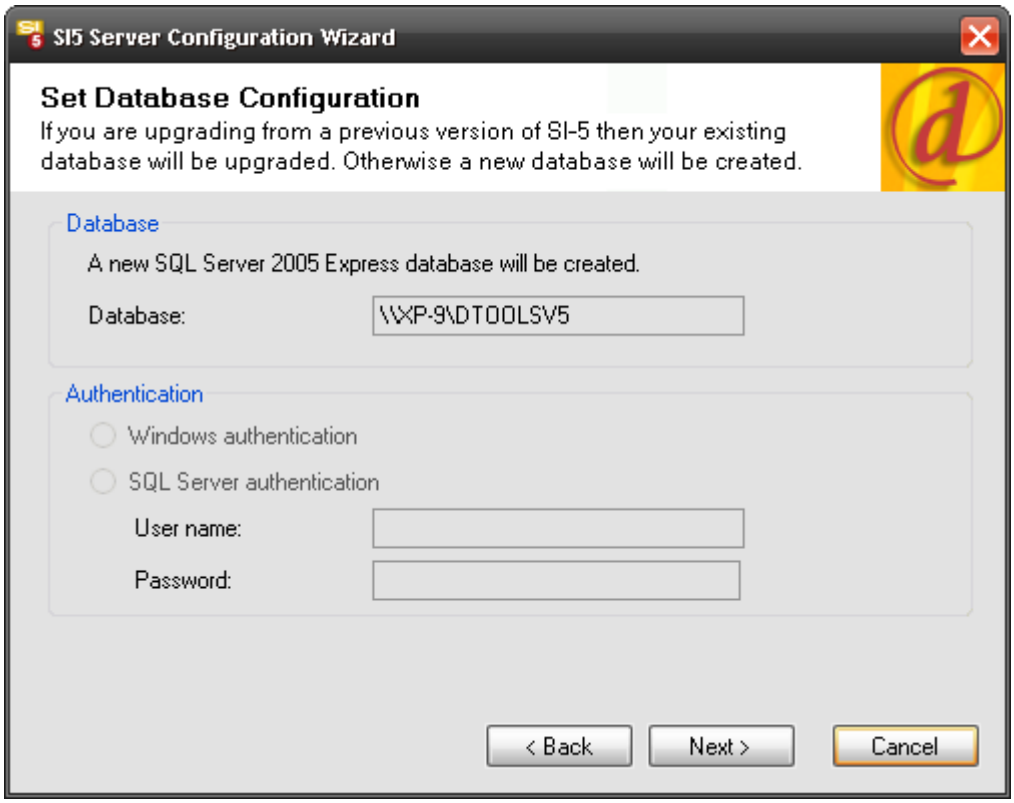
13) Immediately following this selection, the SI5 Server Configuration Wizard will open. Click **[Next >]**. If you cancel this configuration at any time before completing, you can run the Server Configuration Wizard manually via this file C:\Program Files\D-Tools\SI 5\Server\ServerConfigurationWizard.exe:



14) This step checks whether you are upgrading from previous version of SI, click **[Next >]**

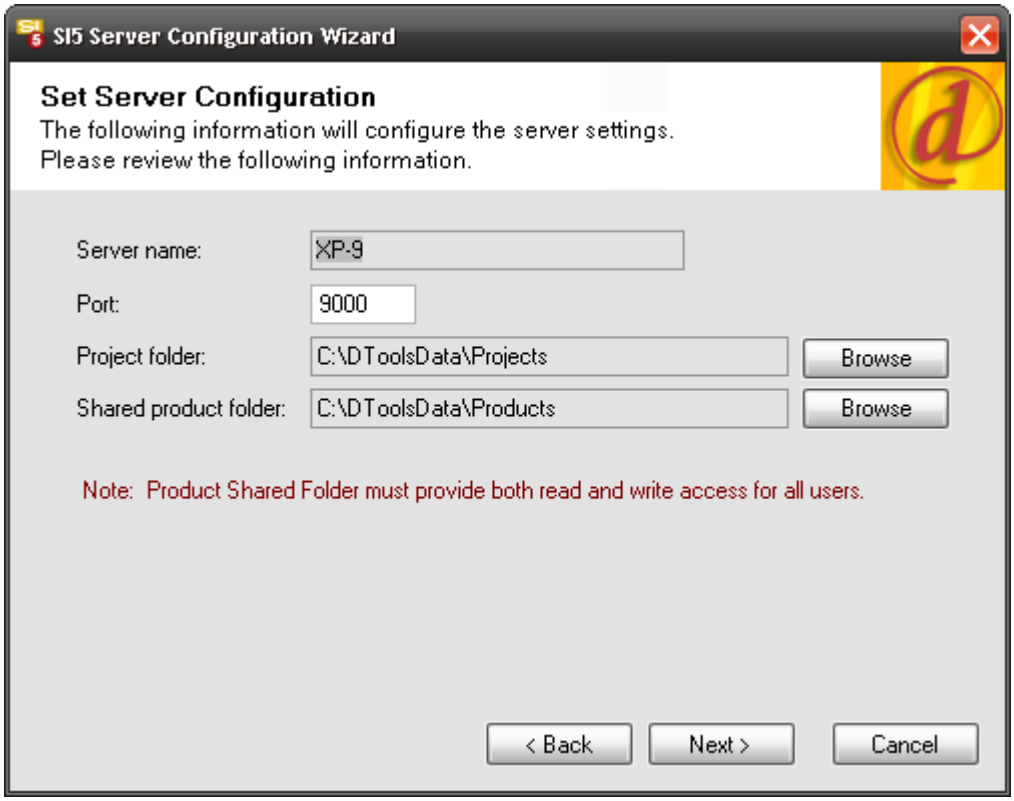


15) Click **[Next]** once you read this form



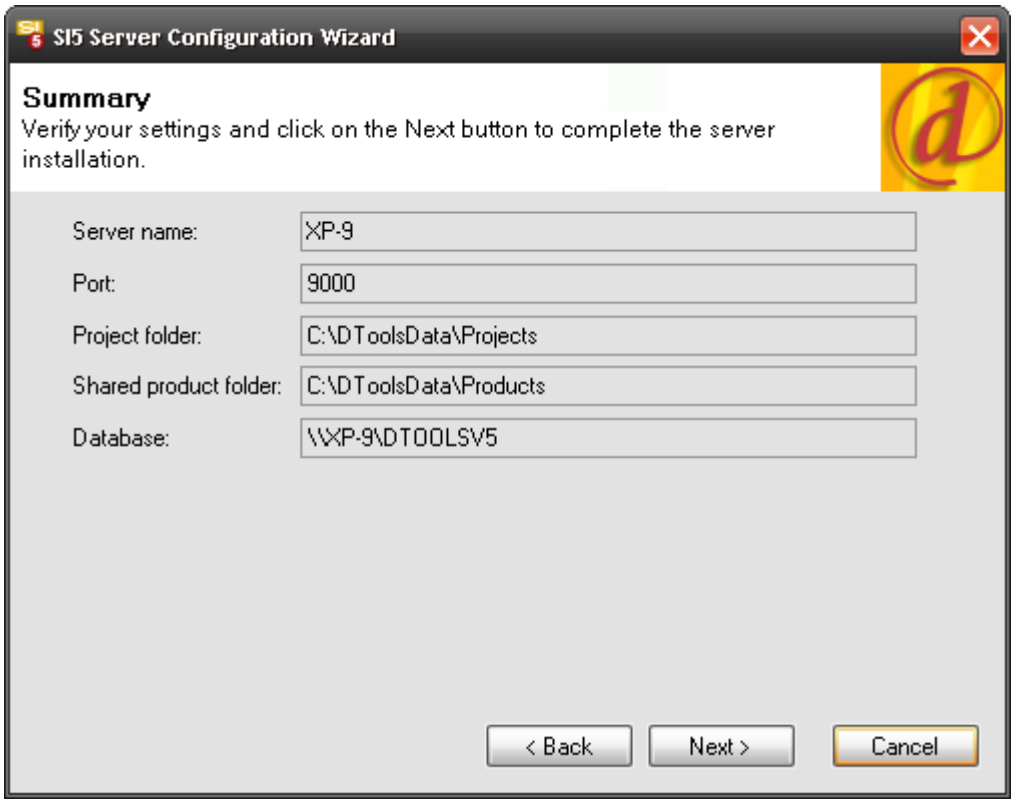
16) This next step will display with all of your information. Request Port "9000" is the default. If you change this, make sure that the port you choose is allowed through your firewall if you are

using one. You can also change the default paths for the Project File and Product Share folders. We recommend you leave these to the defaults.

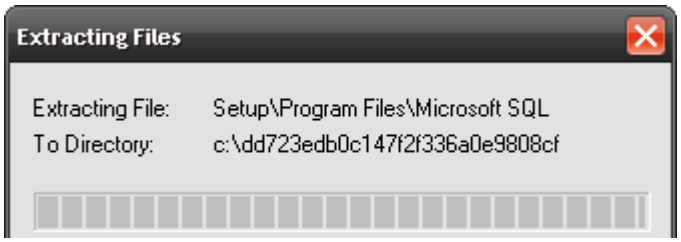


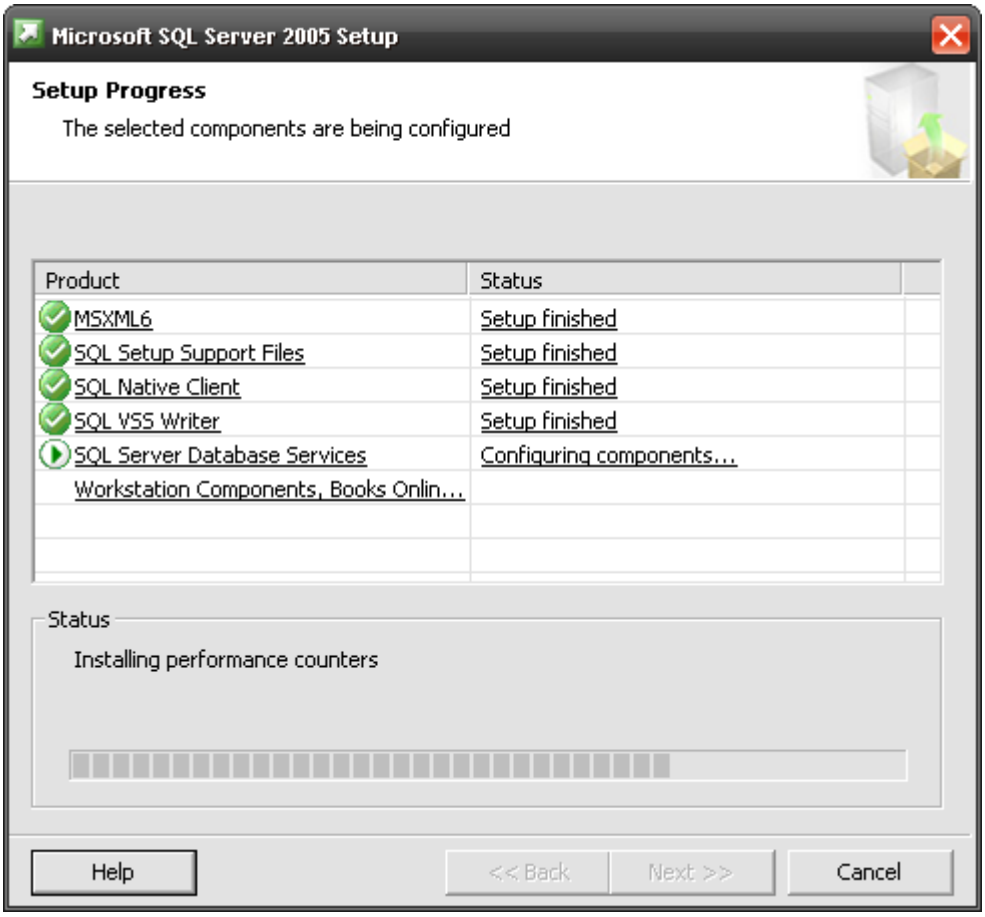
17) Create an Administrator password for the SI 5 Administration Console. **Both** the User Name and Password are case-sensitive.

18) Confirm your install decisions and click **[Finish]**

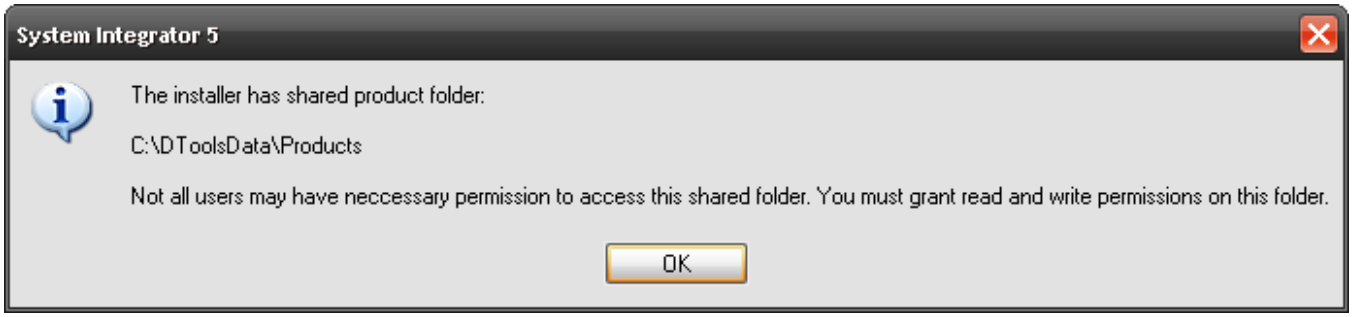


19) Microsoft SQL 2005 Express will install, follow onscreen prompts.

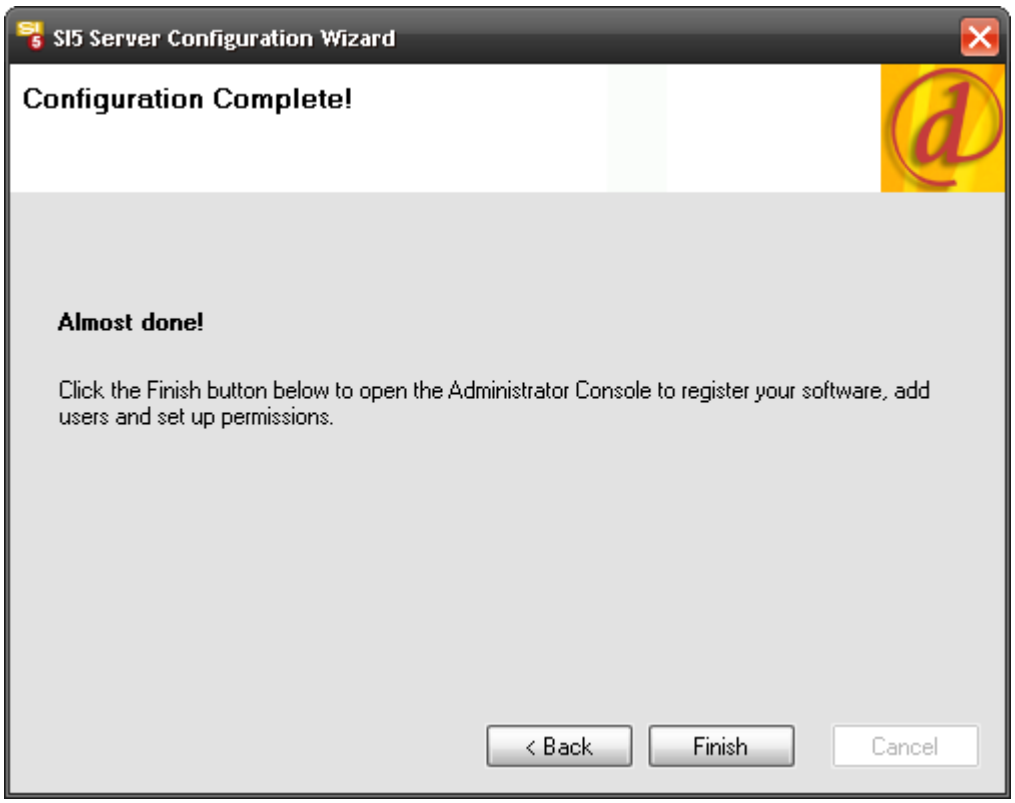




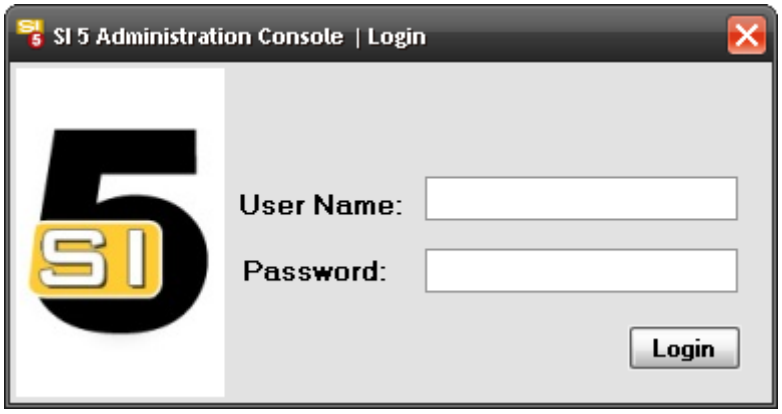
20) Once the install has completed you see the following message letting you know that you must make changes to the Products share folder that was created. Click **[OK]** and the C:\DToolsData folder will open so that you can make the changes, see **Folder Settings** pg **33**:



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



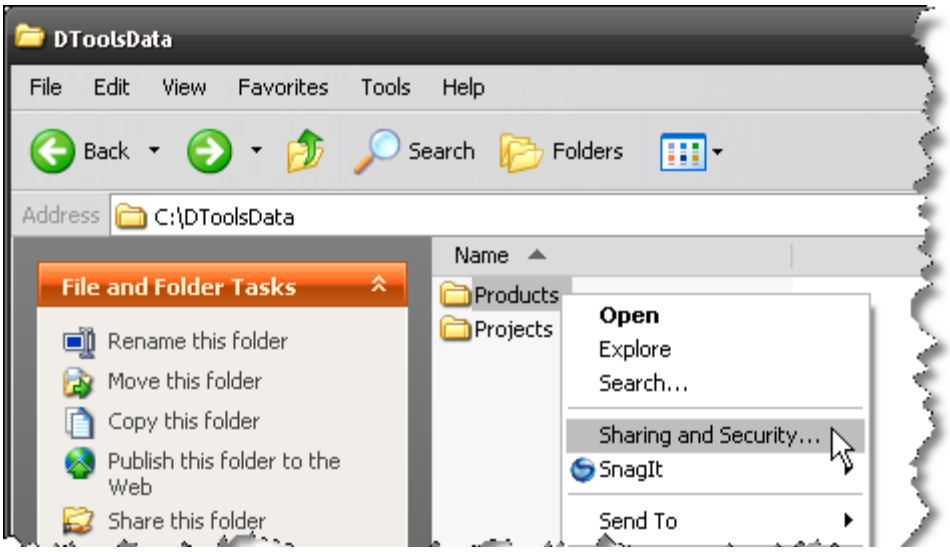
22) The login form for the SI 5 Administration Console will open.



Folder Settings

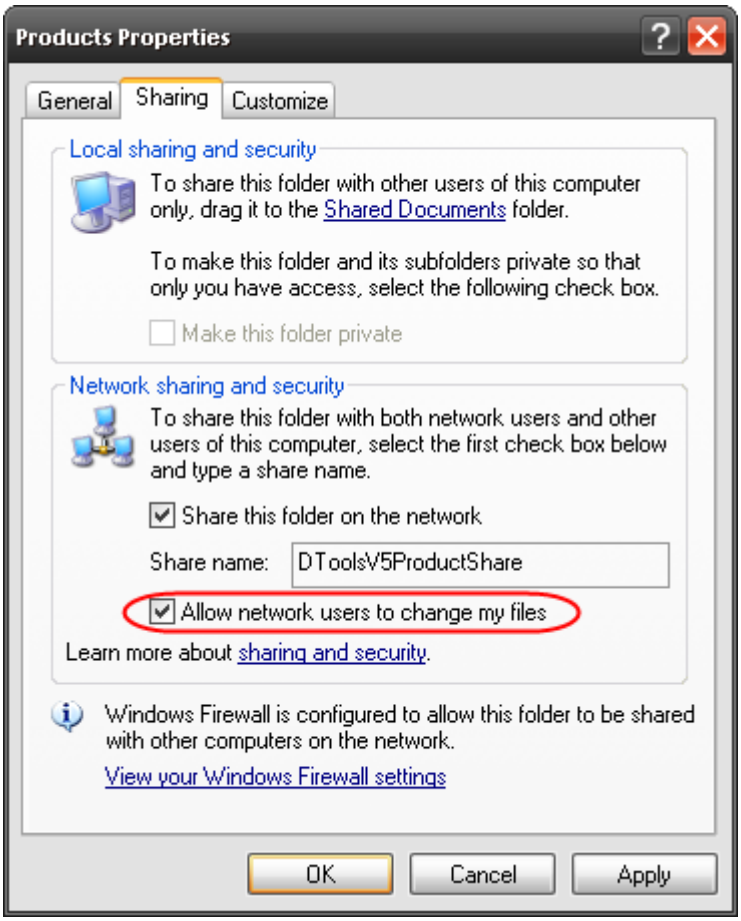
To ensure that all users have access to the Products folder you will need to make “Sharing and Security” setting changes to the folder. To do this:

1) Right-click on the folder and select “Sharing and Security…”

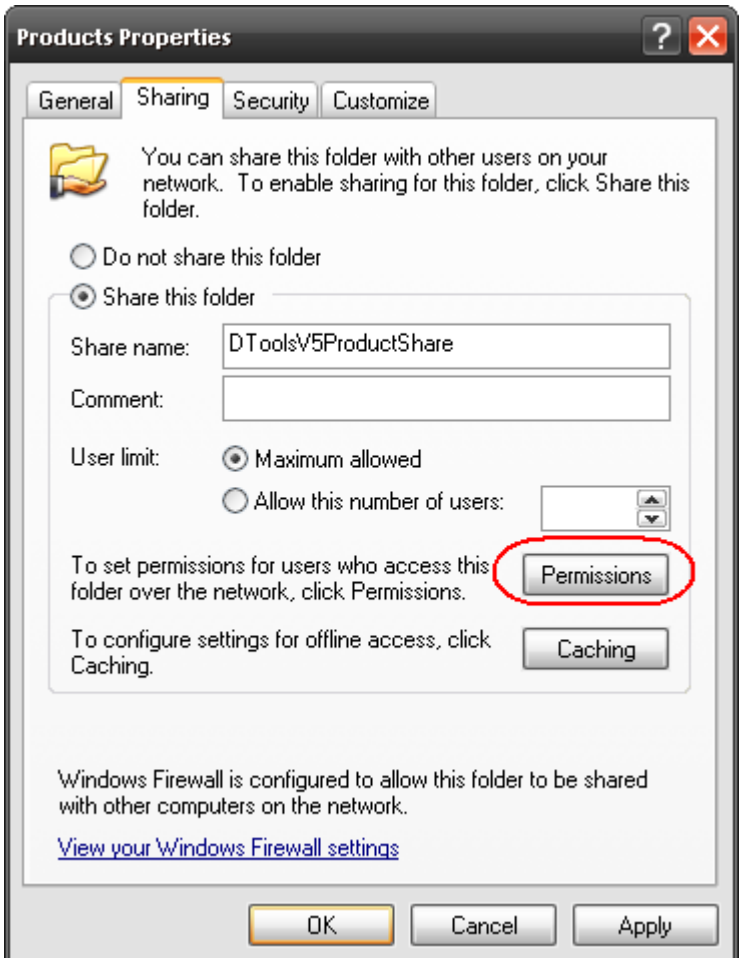


2) This step varies depending on whether your network is on a Workgroup or on a Domain. In either case, DO NOT change the "Share name" of the folder. The Share name must be named **DToolsV5ProductShare**

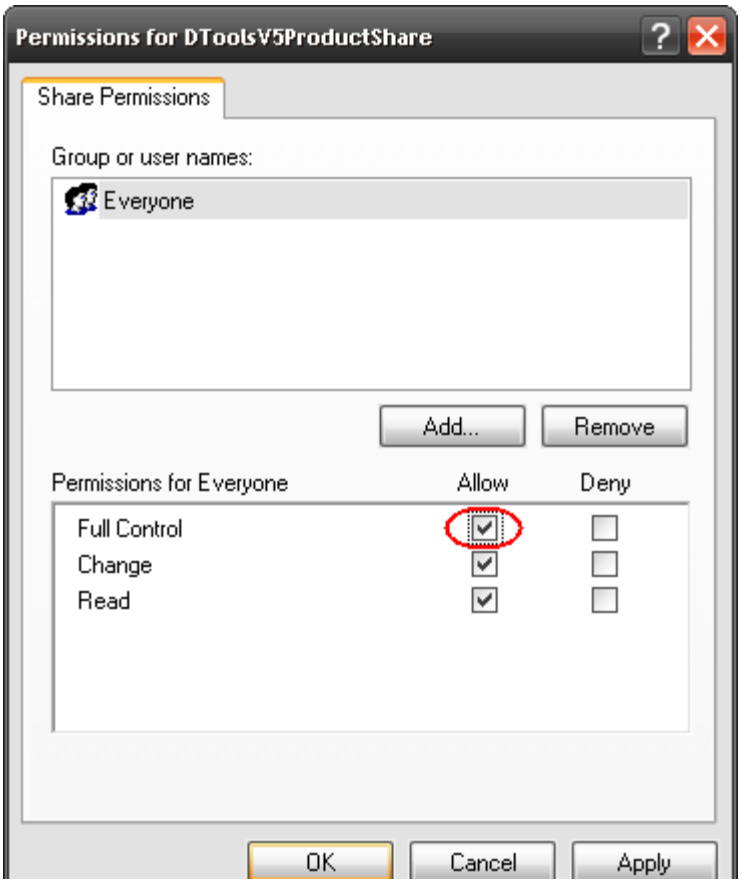
Workgroup – Check the "Allow network users to change my files" checkbox



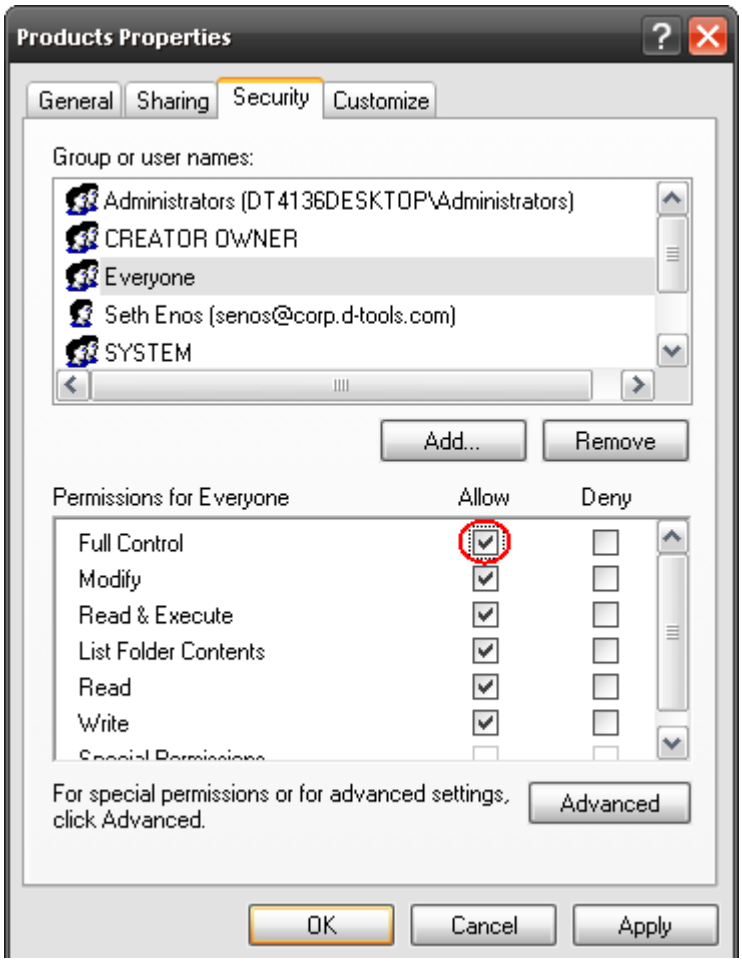
Domain – On the Sharing tab you will need to click the **[Permissions]** button



You can either grant “Full Control” to the Everyone Group or you can add individual user names and grant them “Full Control”:



Click the Security tab and allow “Full Control” for the Everyone Group (you will likely have to add this group) your can add individual user names and grant them “Full Control”



Firewall Settings

If you are using a firewall, you will need to grant access to *three programs:

C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn\sqlservr.exe

C:\Program Files\Microsoft SQL Server\90\Shared\sqlbrowser.exe

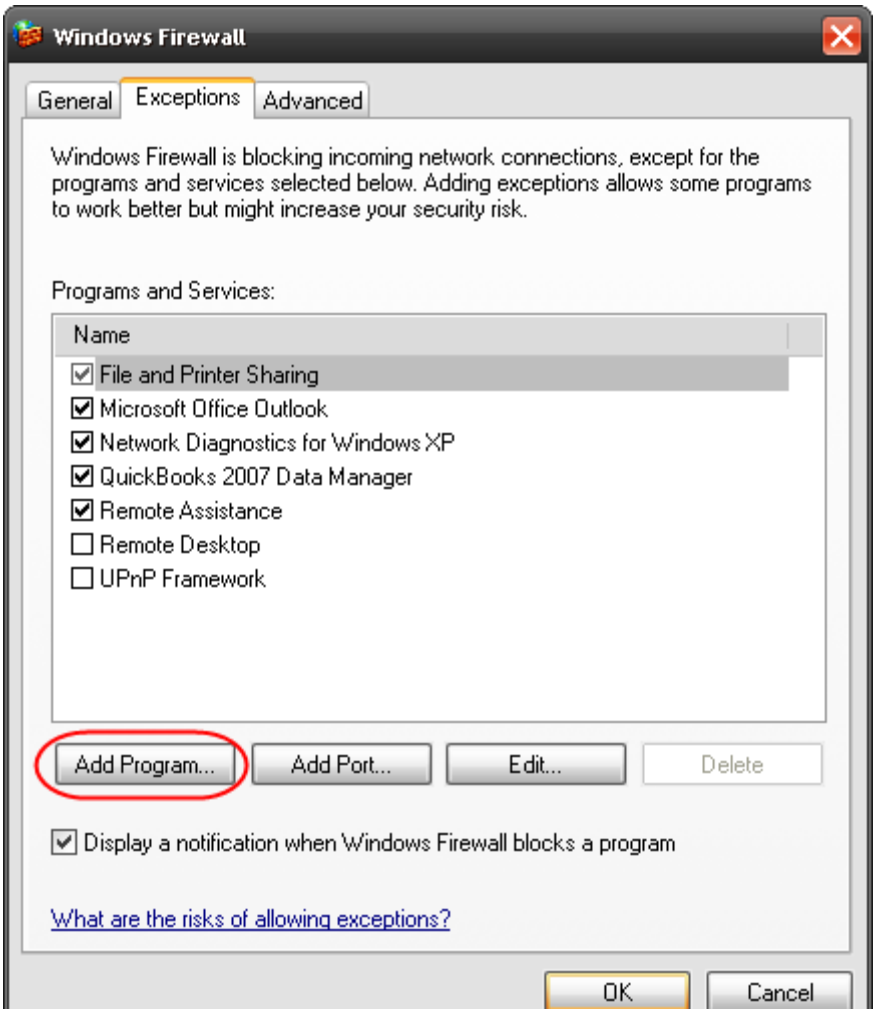
C:\Program Files\D-Tools\SI 5\Server\DTools.Services.exe

*XP paths shown. These files may be in different locations depending on the configuration of your machine

To do this for the Windows Firewall:

1) Open Windows Firewall (Start->Control Panel->Windows Firewall)

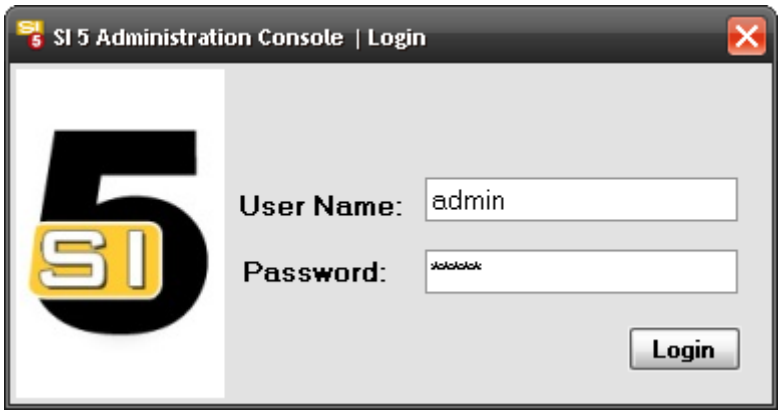
2) Click the Exceptions tab and then the [Add Program...] button to browse to and add the programs listed above:


Windows Firewall
General
Exceptions
Advanced
Windows Firewall is blocking incoming network connections, except for the programs and services selected below. Adding exceptions allows some programs to work better but might increase your security risk.
Programs and Services:
Name
File and Printer Sharing
Microsoft Office Outlook
Network Diagnostics for Windows XP
QuickBooks 2007 Data Manager
Remote Assistance
Remote Desktop
UPnP Framework
Add Program...
Add Port...
Edit...
Delete
Display a notification when Windows Firewall blocks a program
What are the risks of allowing exceptions?
OK
Cancel

Registration and Administration

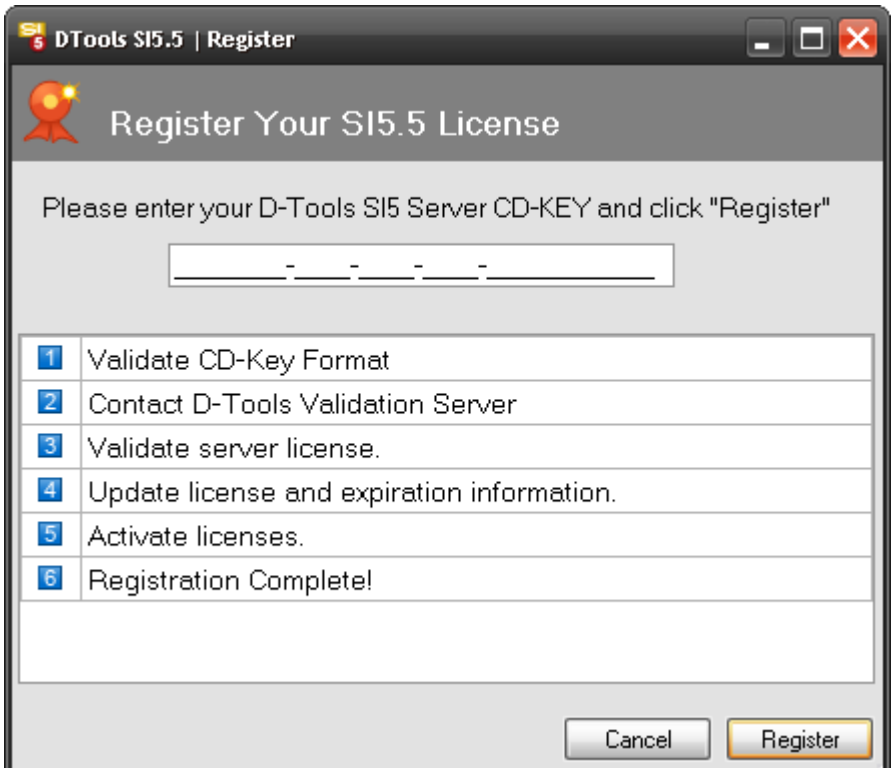
You should Register and Setup Groups and Users prior to installing Client

1) Launch the SI 5 Server Administration console and login using the User Name and Password you set during installation:

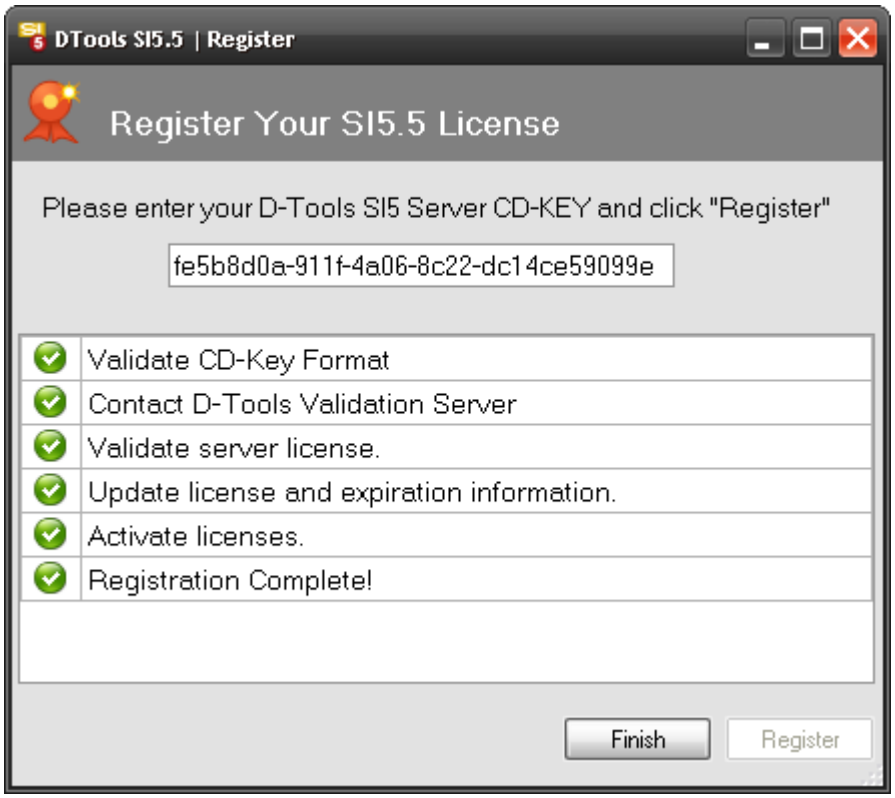


2) The interface will open to the Start Page. Click the **[Register SI5.5 now!]** button:

3) The Register form will open. Type in your CD-Key and click **[Register]**.



4) Click **[Finish]**.

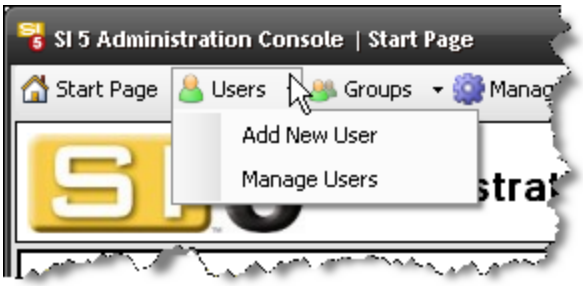


Setup Users and Groups

The SI 5 Administration Console is where you will configure your Groups and Users. Groups are where you will set permissions for Users.

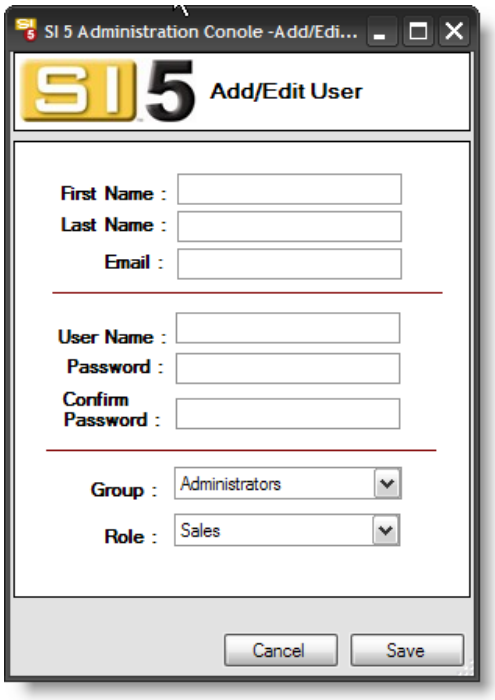
Users

Users are managed with the User's dropdown on the Start page. You can add as many users as you desire. The number of users



Add New User

1. Select "Add New User" and the Add/Edit User form opens
2. Fill in the form. The User Name and Password you create here is what you will use to login to the SI5.5 Client. Don't be concerned about Group assignment at this point. You will assign the Users to appropriate Groups in the "Manage Groups" section later in this chapter. Role is for your reference only.



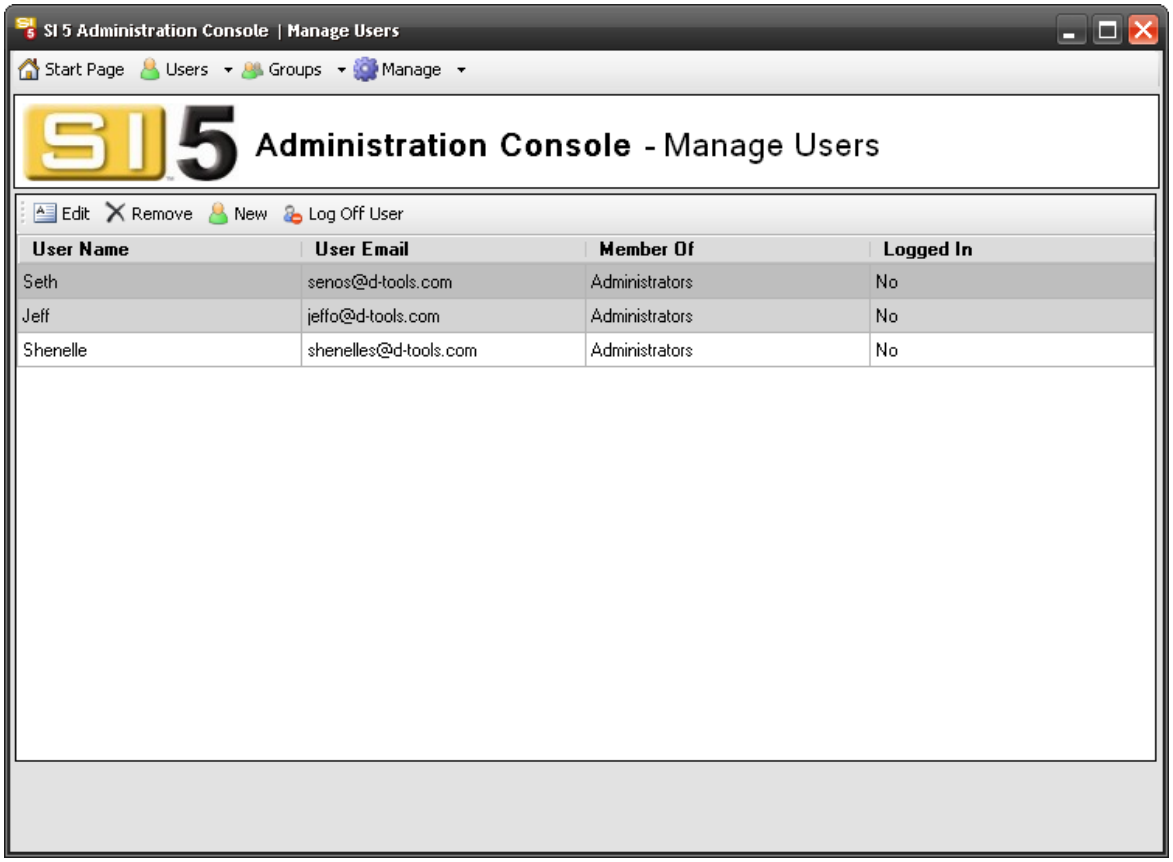
3. Click **[Save]**

Note: You can now go install the SI5.5 Client or you can continue on with this section to establish your Groups and assign your users to an appropriate Group.

Manage Users

1) Click the dropdown next to **Users** and select **Manager Users**.

2) The following form will appear:

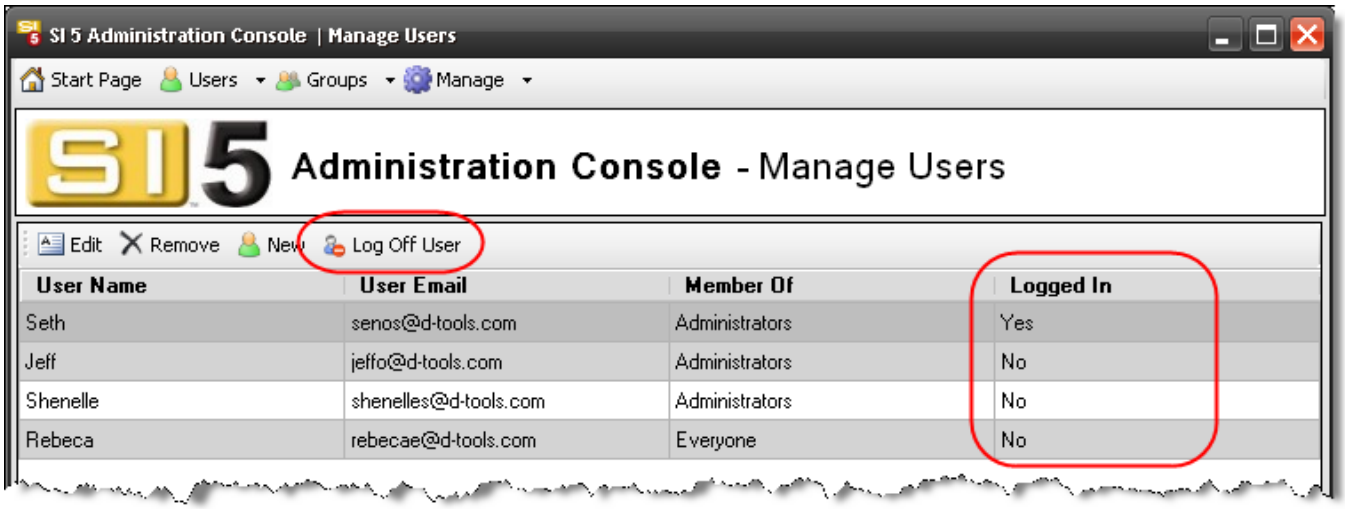


3) Use the **[Edit]** and **[Remove]** buttons to manage existing Users or use **[New]** to create a new User. When you click **[New]**, the Add/Edit User form opens:

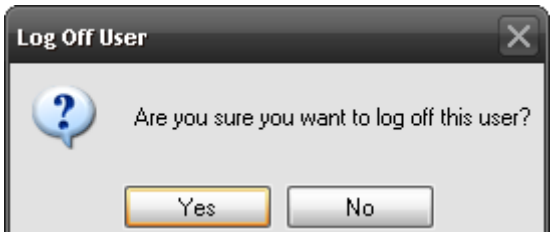
4) Fill in all fields and then click **[Save]**. Role is for your reference only. It is not used elsewhere in SI 5. Don't be concerned about Group assignment at this time. You will create Groups and assign users to those groups in the next step.

Log off User

This function should only be used when something goes wrong and you can't log a user off via the SI 5 Client application. Example: a user marks themselves as "LANSync offline" on their laptop so they can access SI 5 while away from their network and the laptop gets stolen or breaks. In this scenario you could login to the SI 5 Administration Console and use the "Log Off User" option.



Select the User and click the **[Log Off User]** button. You will be asked to confirm:



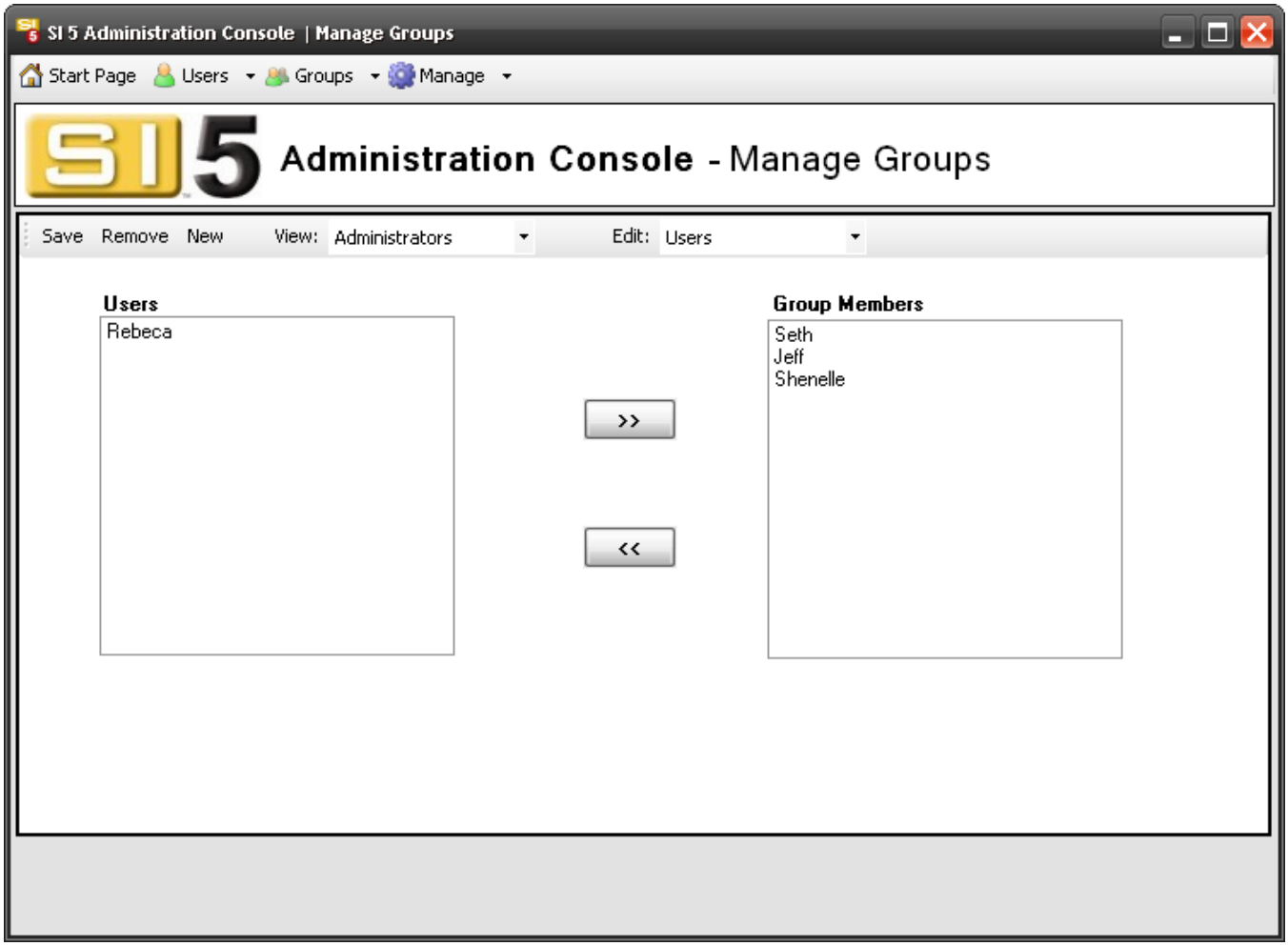
Groups

There are two default Groups in SI 5: Administrators and Everyone. You can modify these and you can create your own Groups. Typical Groups could include Sales, Engineering, Accounting, and Installation.

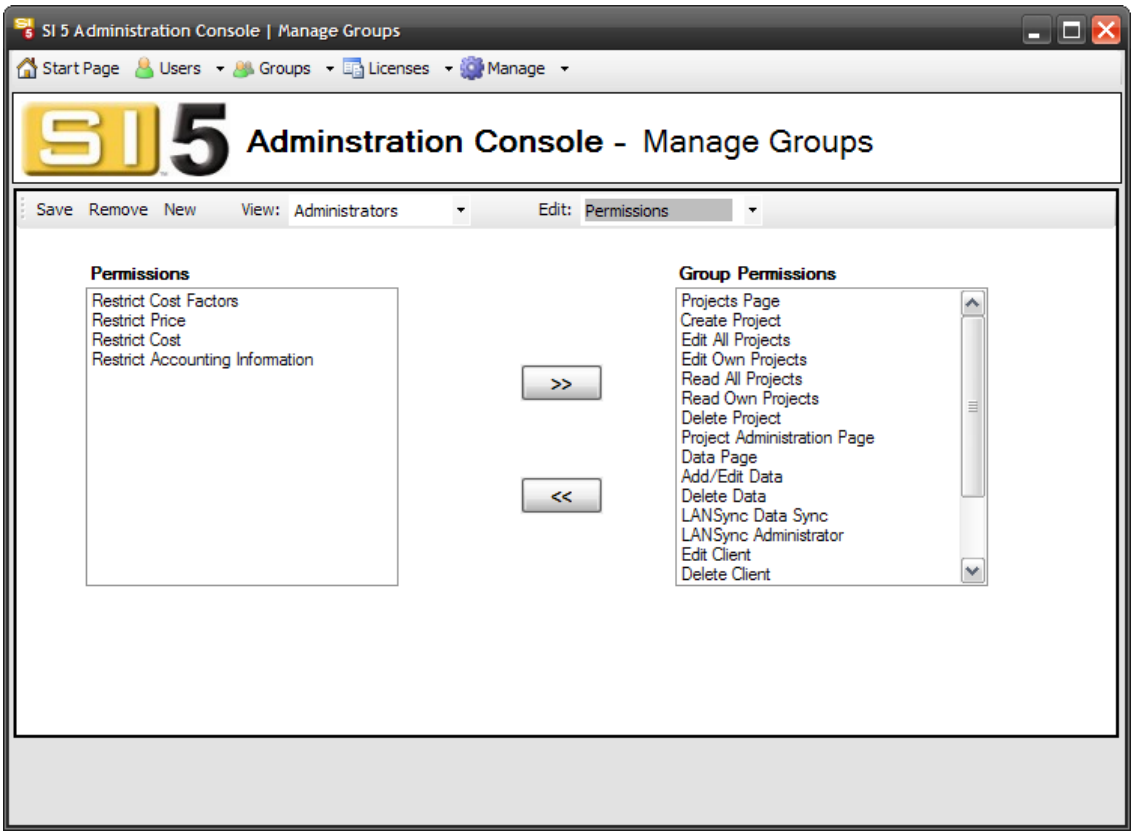
Manage Groups

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

The following screen displays:



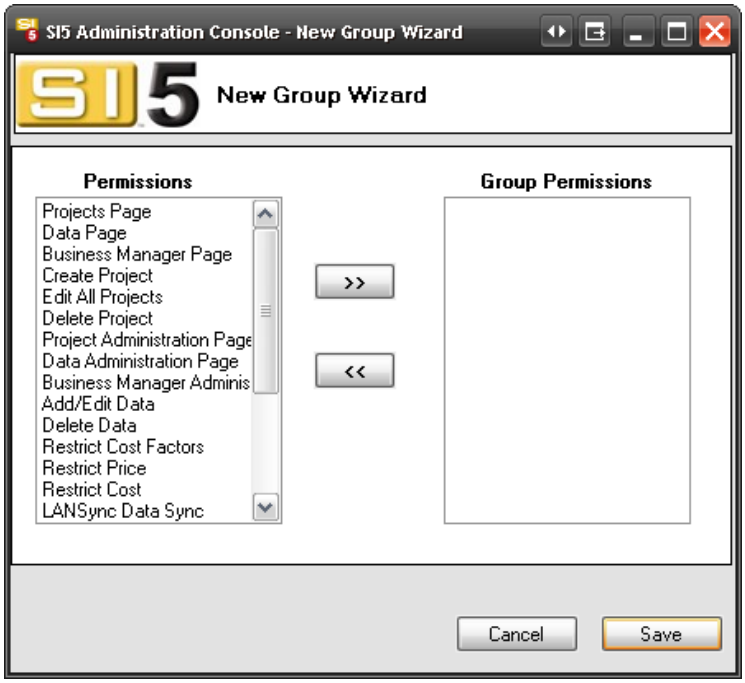
*SI 5 comes pre-set with two Groups: Administrators and Everyone. To modify the permissions for any Group, select the Group from the "View" dropdown and select "Permissions" from the Edit dropdown. Use the **[>>]** and **[<<]** buttons to modify the existing permissions. To assign Users to a Group, select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

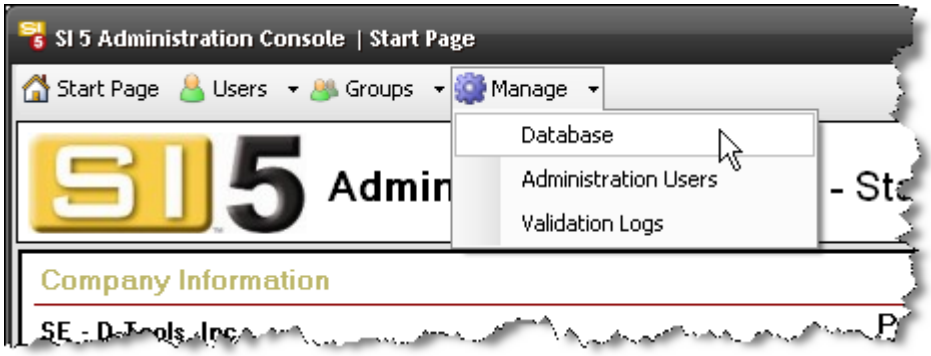
Permission	**Behavior**
Projects Page	Grants access to the Projects tab of the Navigator
Create Project	Grants access to create a Project
Edit All Projects	Grants access to edit ANY Project
Edit Own Projects	Grants access to only those Projects created by the user
Read All Projects	Grants access to read/view 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

Permission	**Behavior**
Business Manager Page	Allows user access to Business Manager functionality
Create Custom Reports	Allows user to generate and install custom reports
Run Excel Reports	Allows user to run Excel reports.
Add/Edit Service Orders	Allows user to create or edit Service Orders
Add/Edit Tasks	Allows user to create or edit Tasks
Assign Resources	Allows user to create and assign resources
Manage Schedule	Unrestricted scheduling capabilities. Allows user to modify project working hours and move tasks in the resource calendar, as well as perform all tasks listed in Add/Edit Task, Add/Edit Service Order, and Assign Resources above
Allow QuickLinks	Allows user access to QuickLinks (optional, additional license)
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]**:

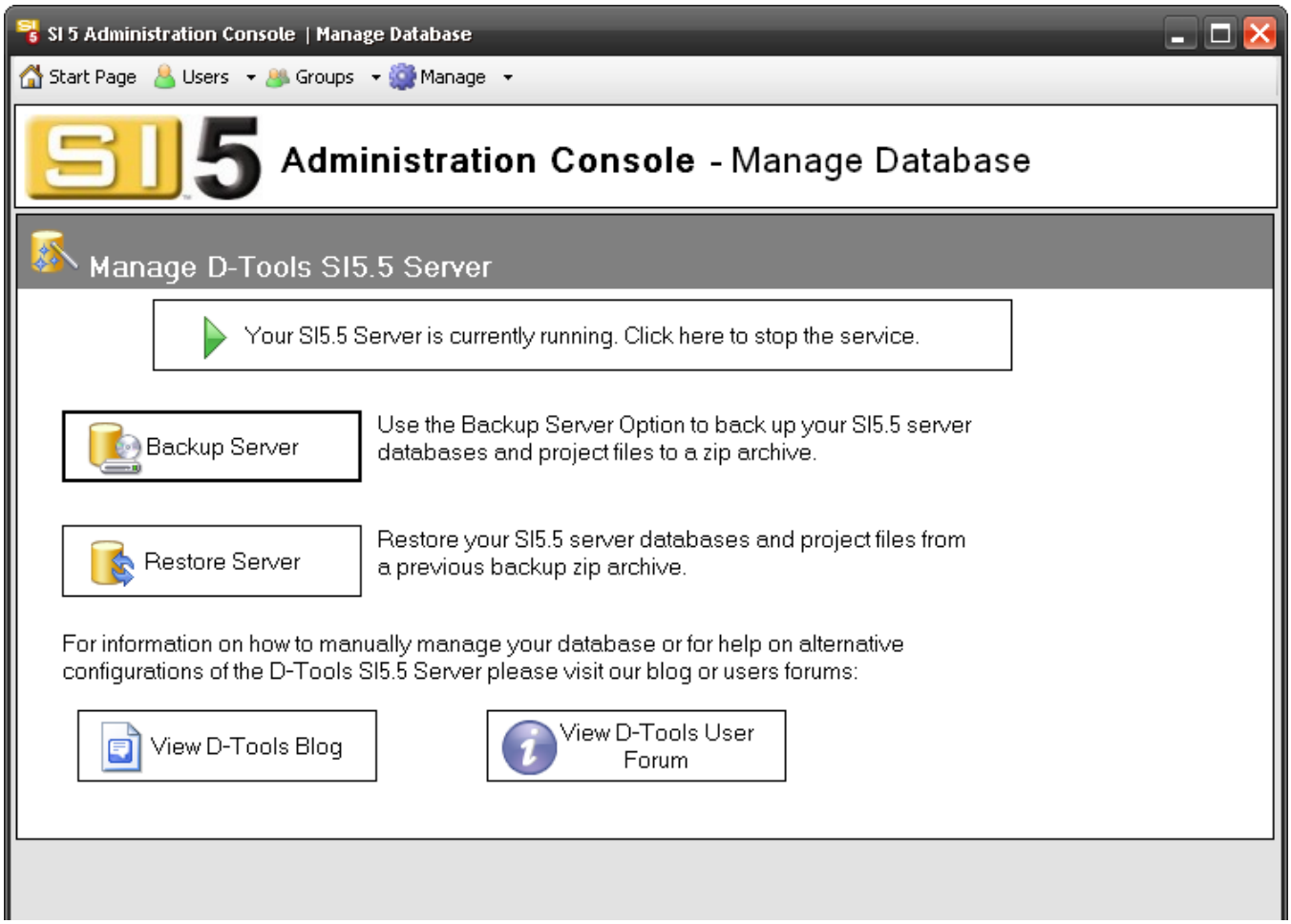
Manage

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



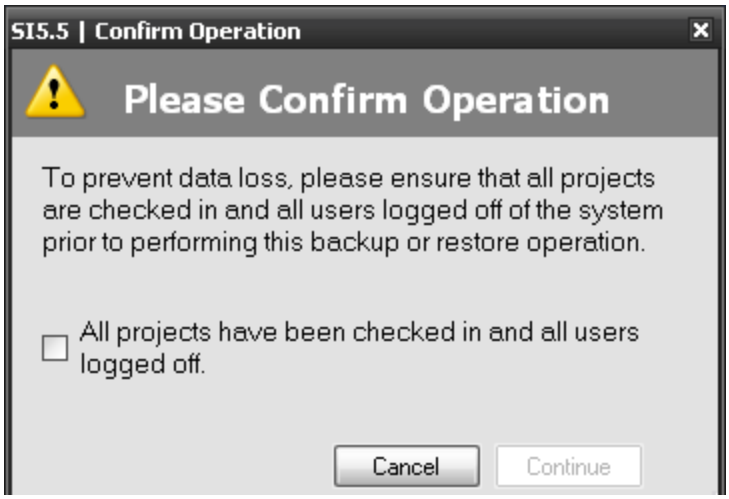
Manage ->Database

Clicking Manage -> Database will provide the following interface for backing up and restoring your Server data:



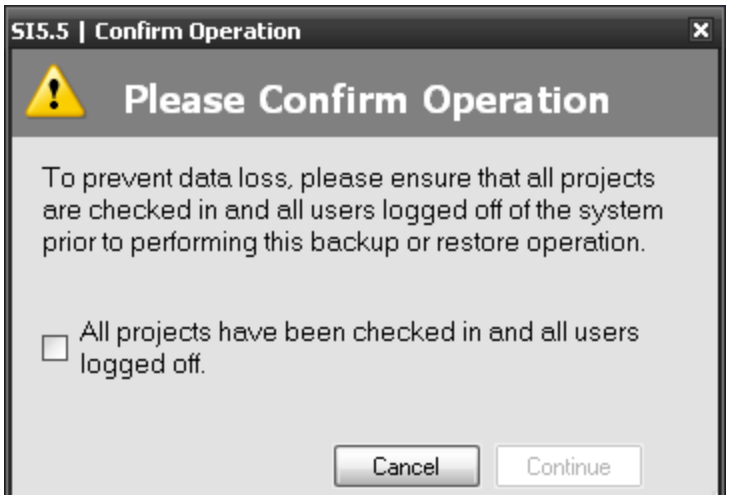
You should make a habit of creating daily or weekly backups of your Server data. Be sure to backup this data to a different physical device. If you are using a dedicated server, it may include software that will automatically backup SQL data. This Backup and Restore function primarily for use if you want change the machine where the SI 5 Server is installed.

When you click **[Backup Server]**, you will be prompted to verify that you have checked in all projects and that all user are logged out of SI 5:



Once you confirm, you will need to Browse to a folder where you want to save your SI5.5 Server Backup Archive file to. You will not need to change the path of the "Server Project Folder" unless you changed the defaults during install. Click **[Backup Server]** when ready:

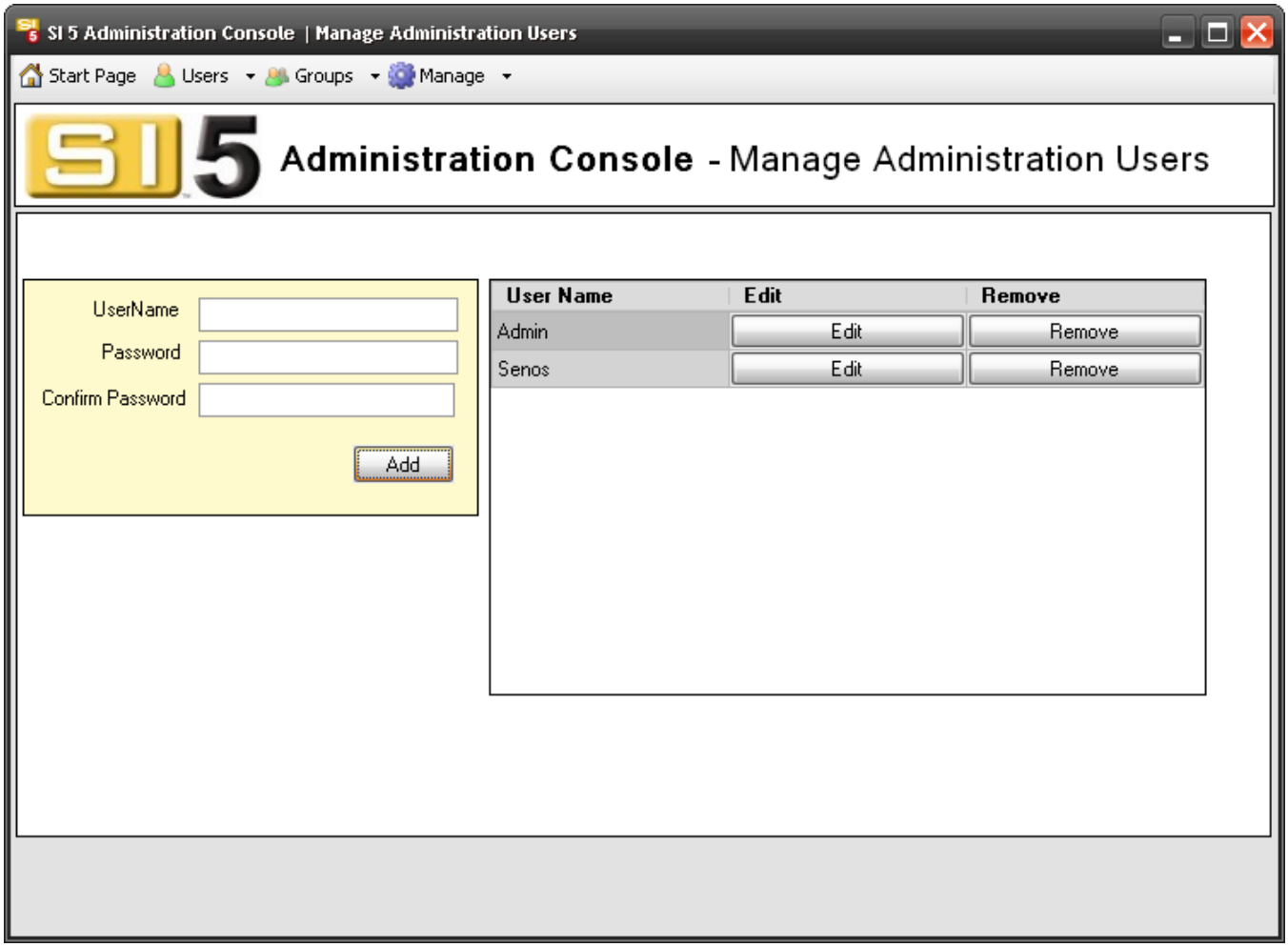
Use the **[Restore Server]** button to restore a backup of your data. Once again, you will be prompted to confirm that all projects are checked in and that all users are logged out of SI 5:



Once you confirm, you will then browse to where your backup file stored. The path for where your SQL data is stored will be filled in for you. Her you will make a choice between deleting or overwriting the existing files, deleting is recommended. When ready click **[Restore Server]**:

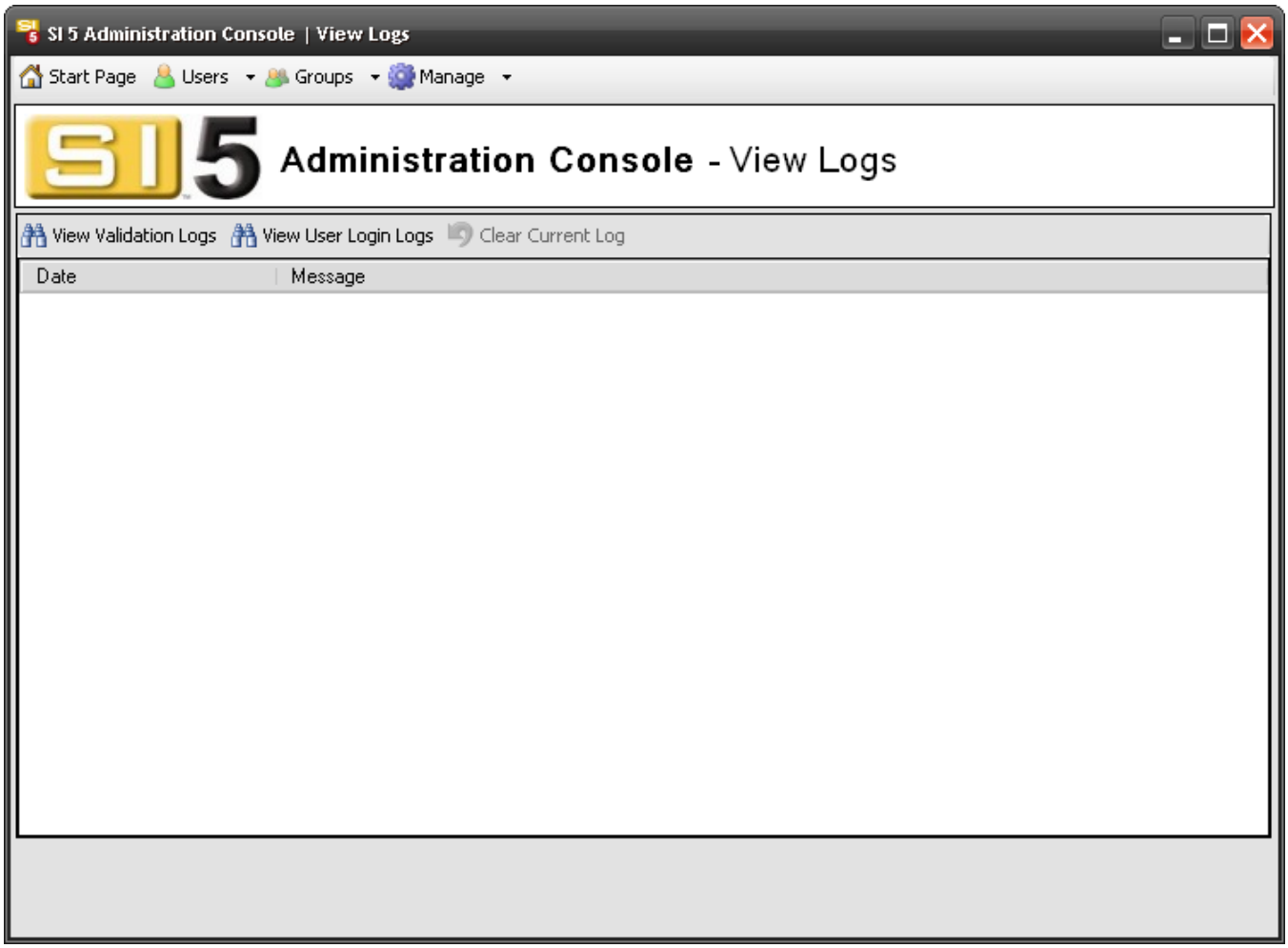
Manage -> Administration Users

This is where you can Add, Delete and Edit users that can have access to the SI 5 Administration Console. These logins are completely separate from the User logins that you create for your staff.



Manage->Validation Logs

This is where logs will be recorded for any issues that you may encounter when logging into SI 5 from a Client machine. Our Tech Support department may use these in determining the cause of any issues encountered.


SI 5 Administration Console | View Logs
Start Page
Users
Groups
Manage
Administration Console - View Logs
View Validation Logs
View User Login Logs
Clear Current Log
Date
Message

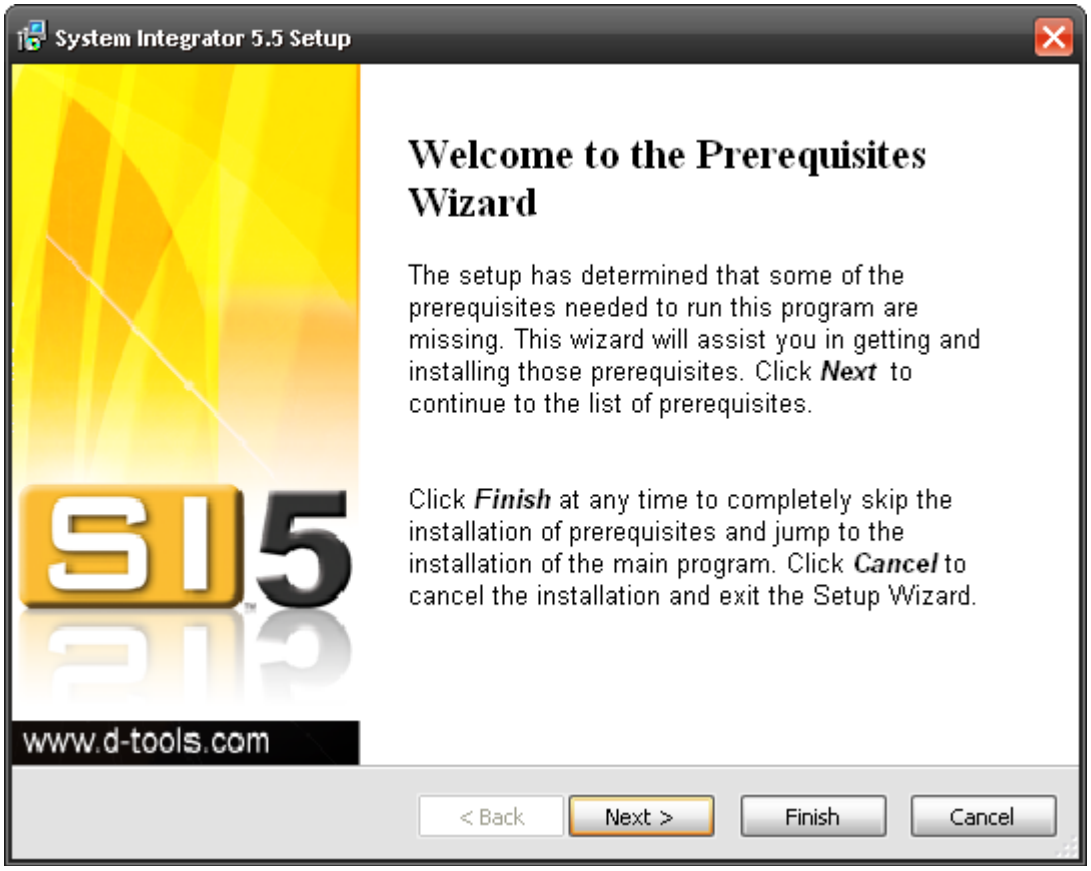
Installing the SI5.5 Client

You should Register and setup Groups and Users prior to installing Client. If you plan to use Visio, AutoCAD, or QuickBooks you must install those applications prior to installing the SI 5 Client

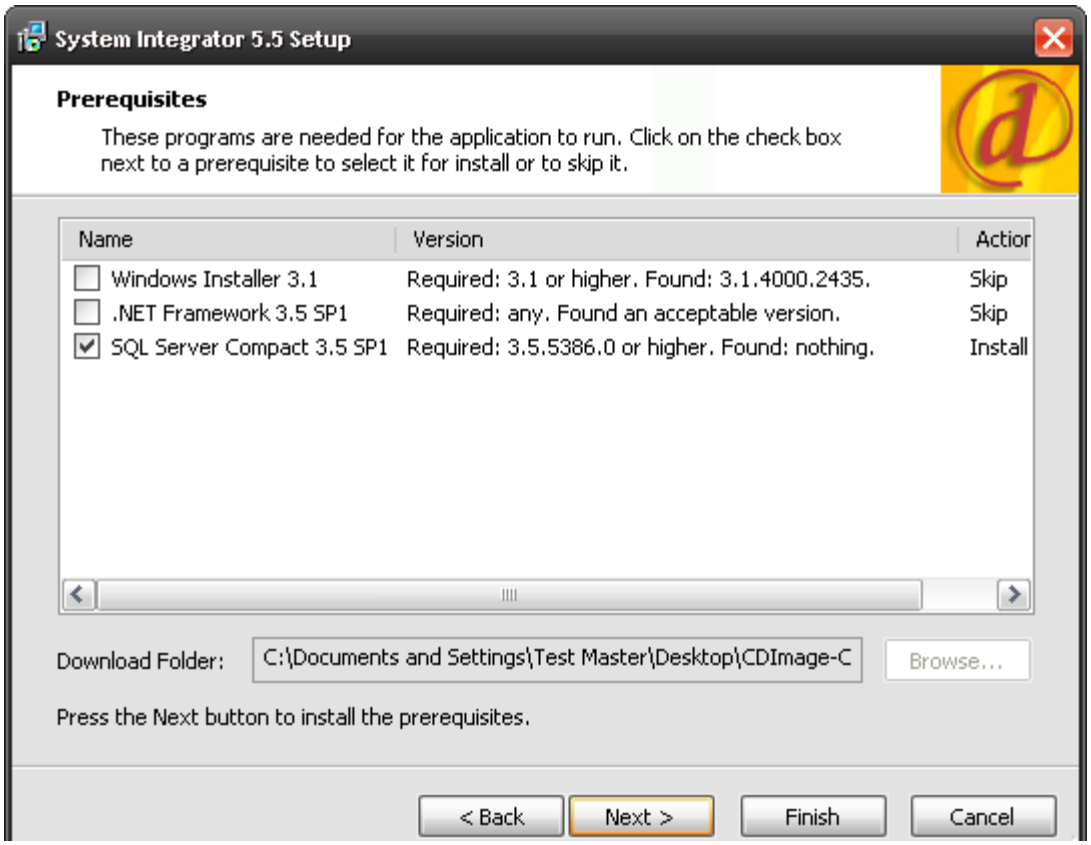
1) Insert disc into CD or DVD drive.

2) If the installation process does not automatically begin, browse to the CD drive and Double-click the *Install.hta* file. The D-Tools System Integrator 5.5 install from will open. Choose **Install System Integrator 5.5 Client**.

3) The installer will determine if all prerequisites are installed. Click **[Next >]**.

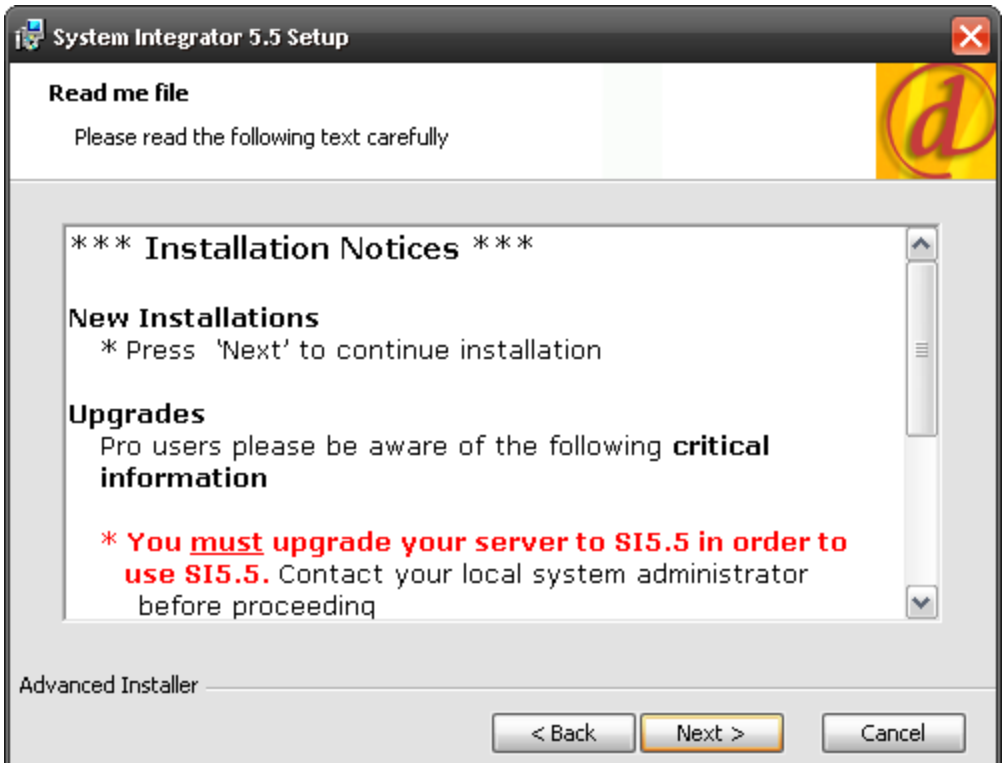


4) Click **[Next >]** to install any missing prerequisites. Follow the onscreen instructions for the third-party installs.



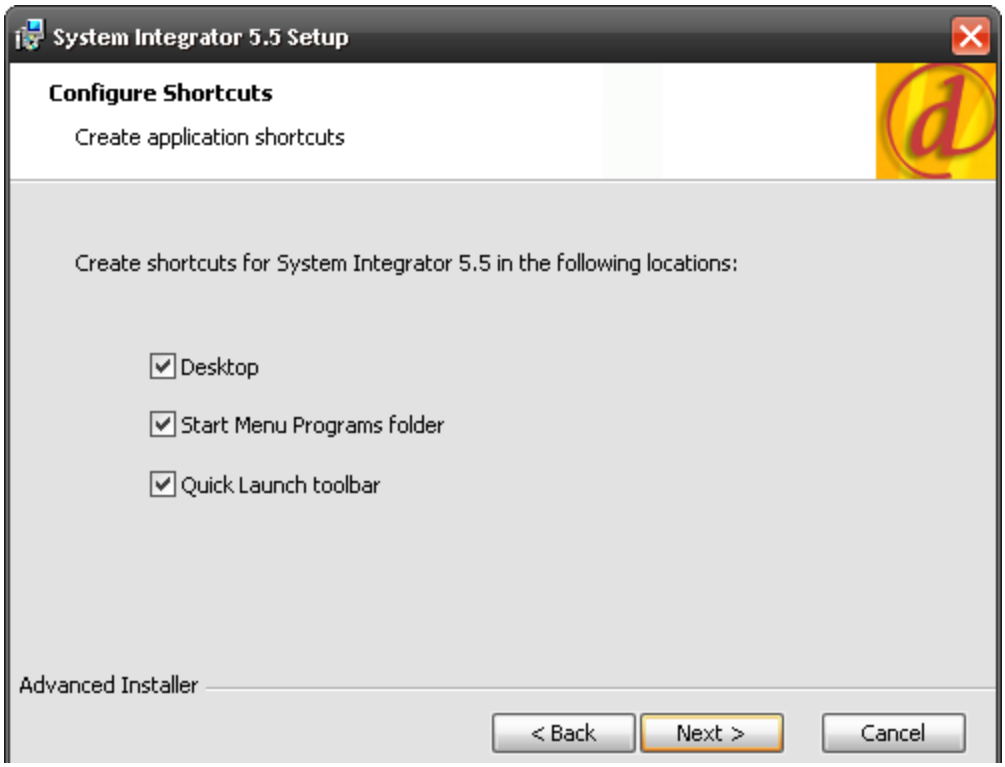
5) Click **[Next >]** to proceed.

6) Read the Read Me file and then click **[Next >]**

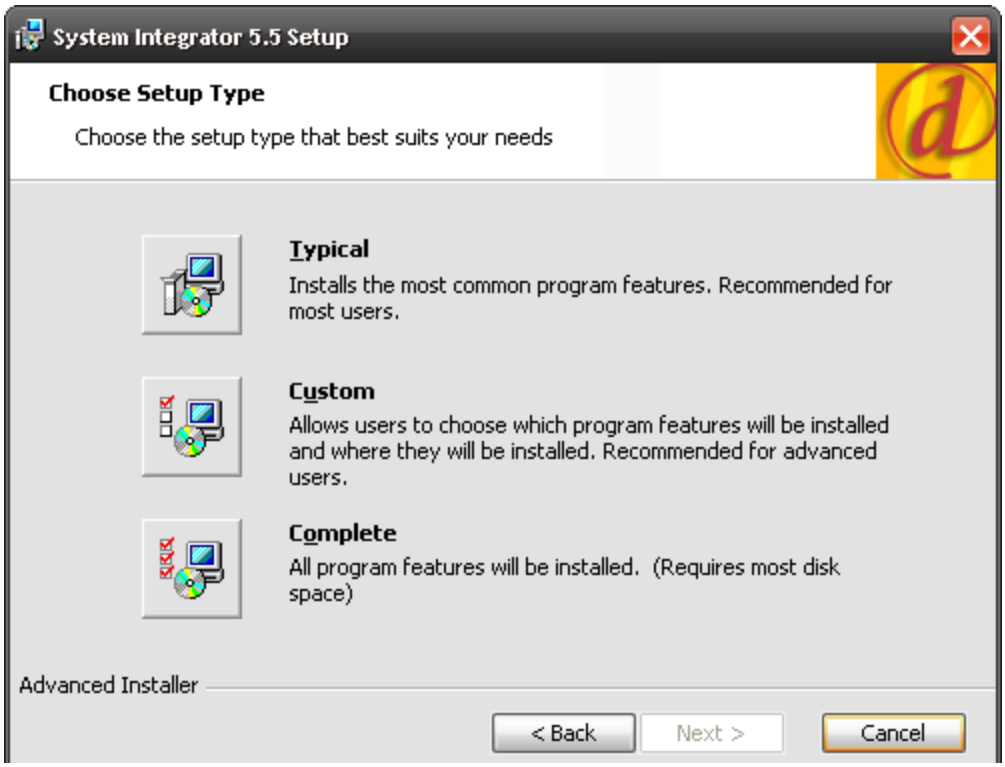


7) Read and Accept the End-User License Agreement and then click **[Next >]**

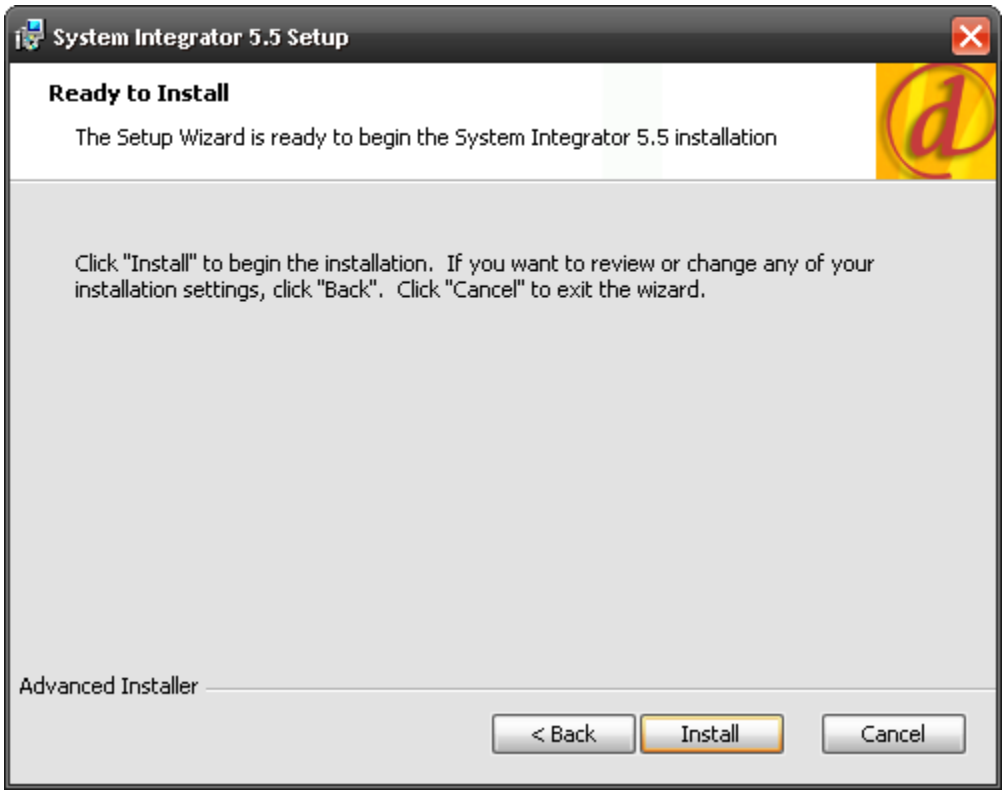
8) Click **[Next >]** on the Configure Shortcuts step:



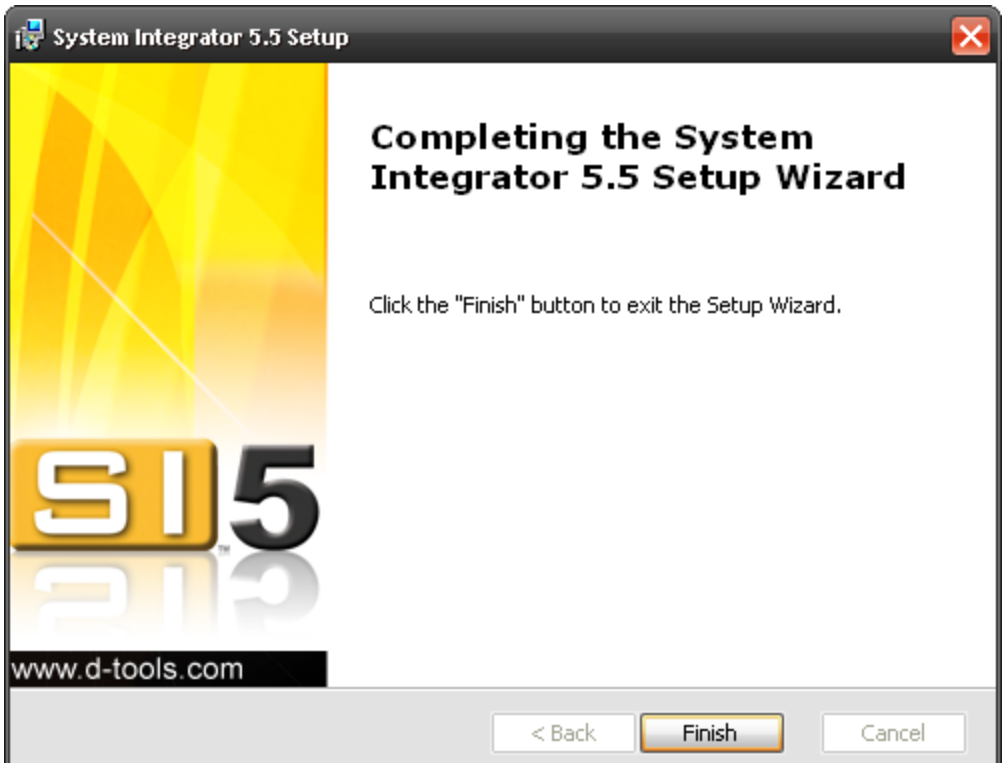
9) We recommend doing a **Complete** install. If you have QuickLinks you must do a **Complete** install so that functionality is added.



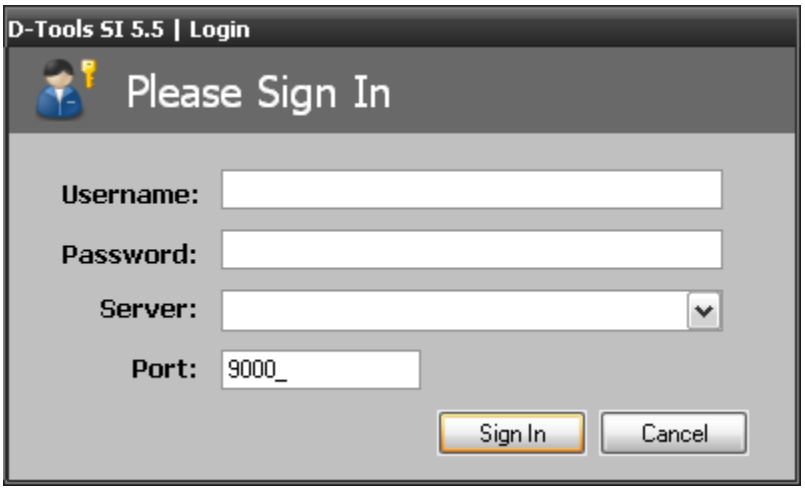
10) Confirm you decision to install by clicking **[Install]**



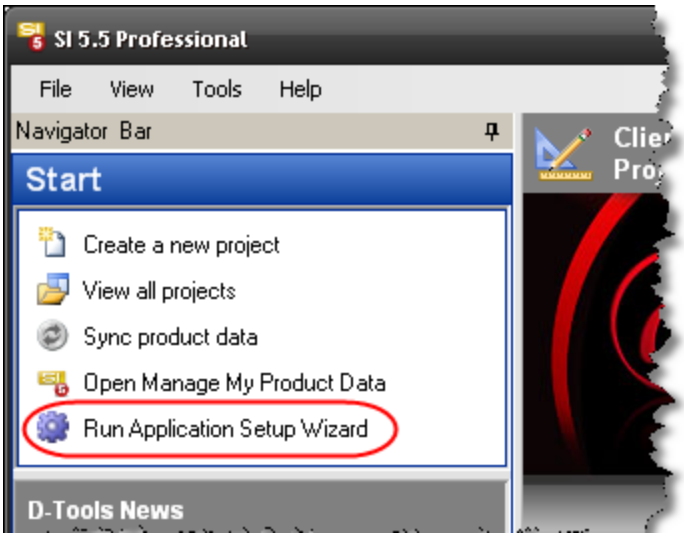
11) When the install is completed, click **[Finish]**



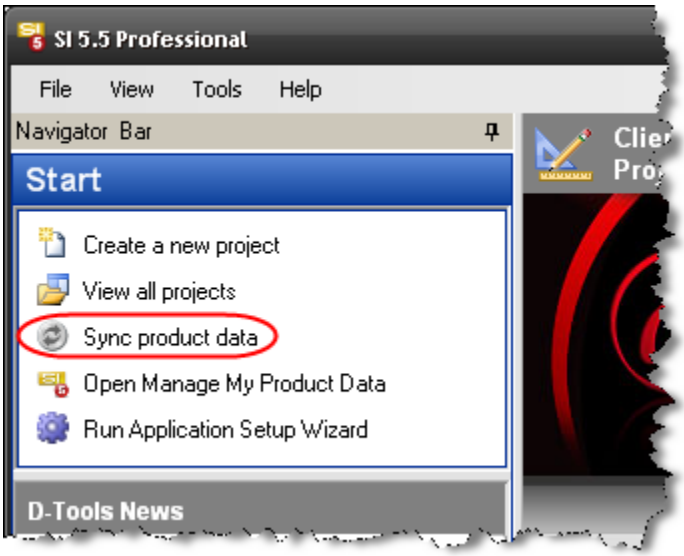
12) When you launch the SI 5 Client, you will be prompted to login. This form will retain the values the next time you login. Use the Username and Password that you were assigned or that you perhaps created yourself by following the instructions on pg. 42 of this guide. The Server field should be the Computer Name of the machine where your SI5.5 Server is installed. The default port is 9000 unless you changed it during your installation of the SI5.5 Server. If you do not know the Server or the Port, ask whoever installed the SI 5 Server on your network.



13) Run the Application Setup Wizard.



14) Click “Sync product data” to establish your Server database:

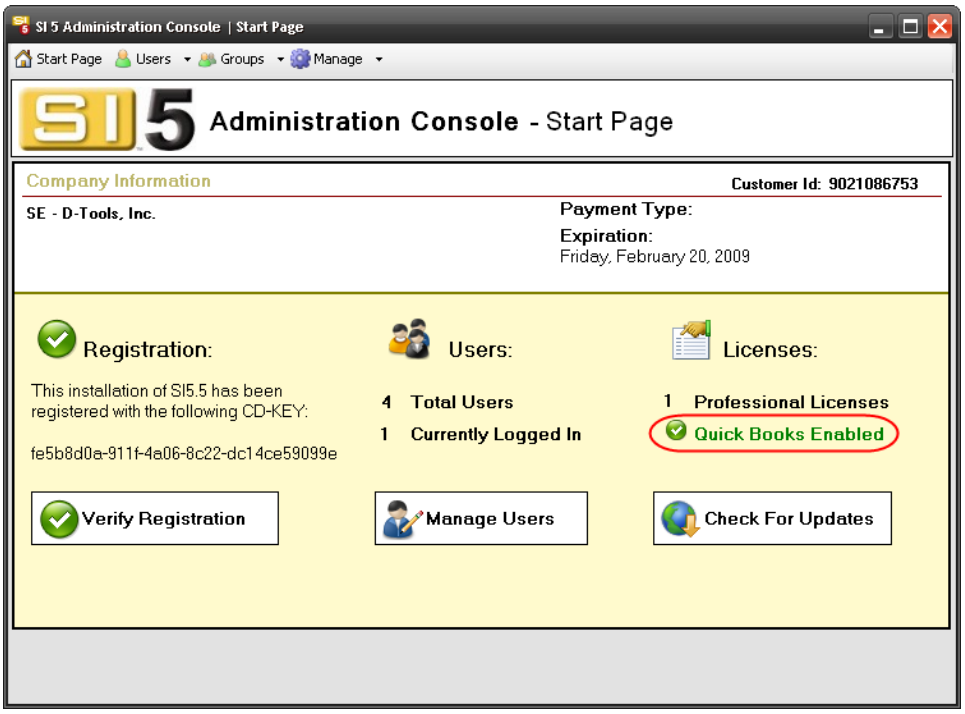


Configuring QuickLinks

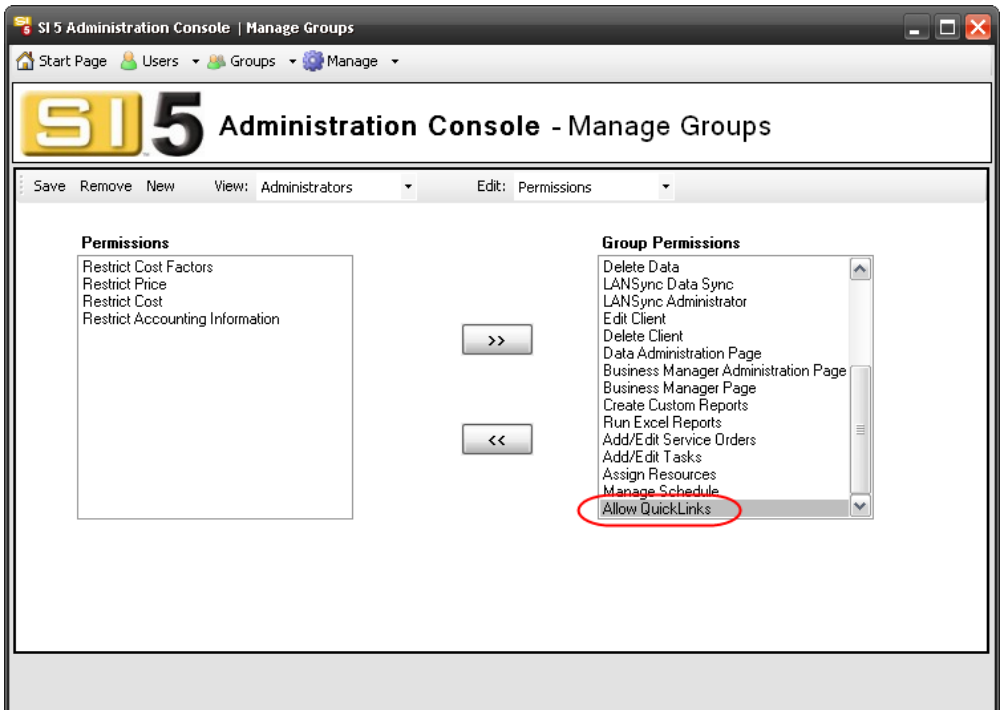
If you installed using the “Complete” option, QuickLinks was installed. QuickLinks is our interface to QuickBooks and is an additional, optional license. QuickBooks must be installed on the machine where you intend to use QuickLinks. The following steps show how to configure QuickLinks for use on Client installs.

> *You may see QuickLinks referred to as LinkTools or as LinkTools-QuickBooks in some of our documents and videos. They are the same thing.*

1) Verify that you have a QuickLinks license for your company: “QuickBooks Enabled” will display on the Start Page of the SI 5 Administration Console



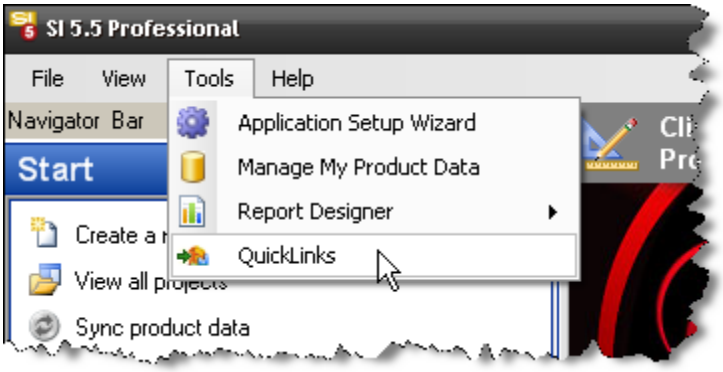
2) Verify that your User is assigned to a Group that has the “Allow QuickLinks” permission:



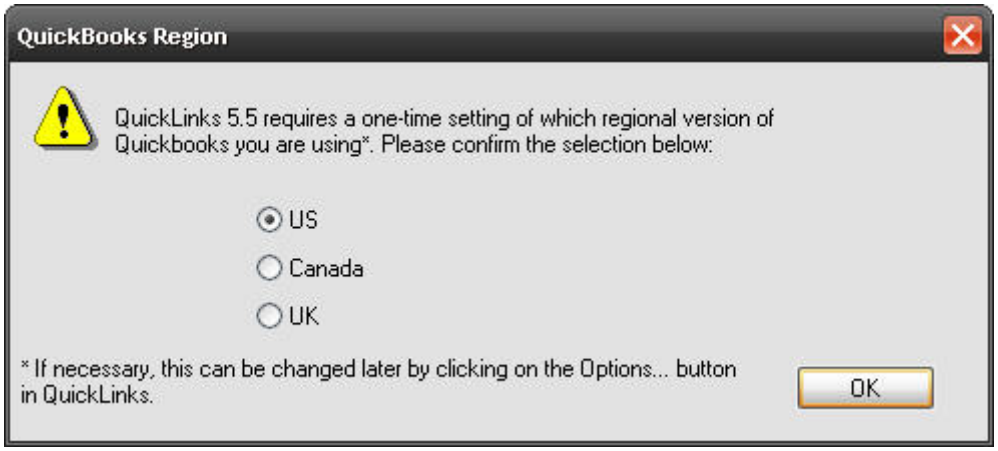
3) Open QuickBooks and login as “Admin”. This is necessary to make the initial connection between SI 5 and QuickBooks. You do not need to be logged in as “Admin” to use QuickLinks in the future

4) Open SI 5 and login.

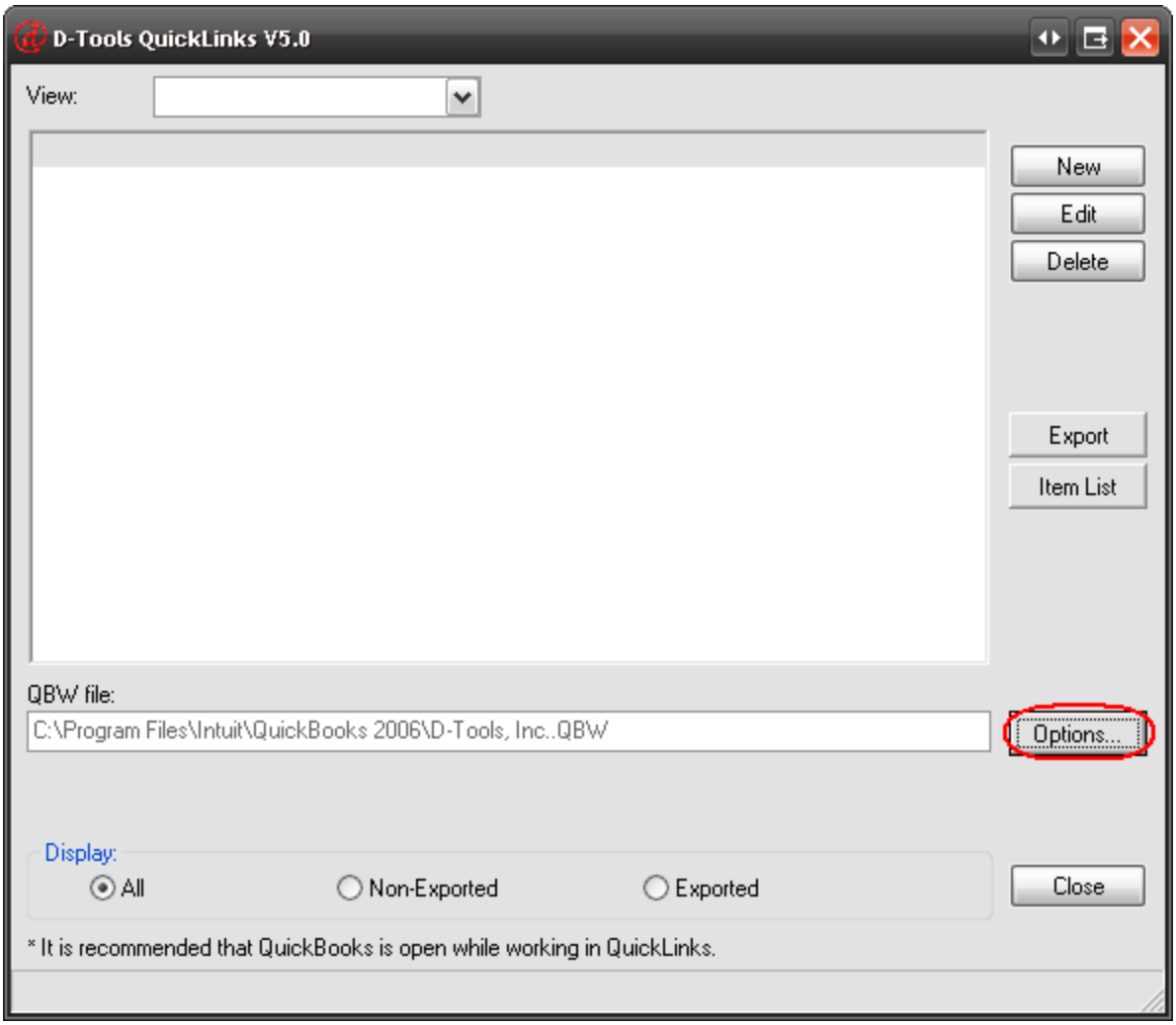
5) Select Tools->QuickLinks



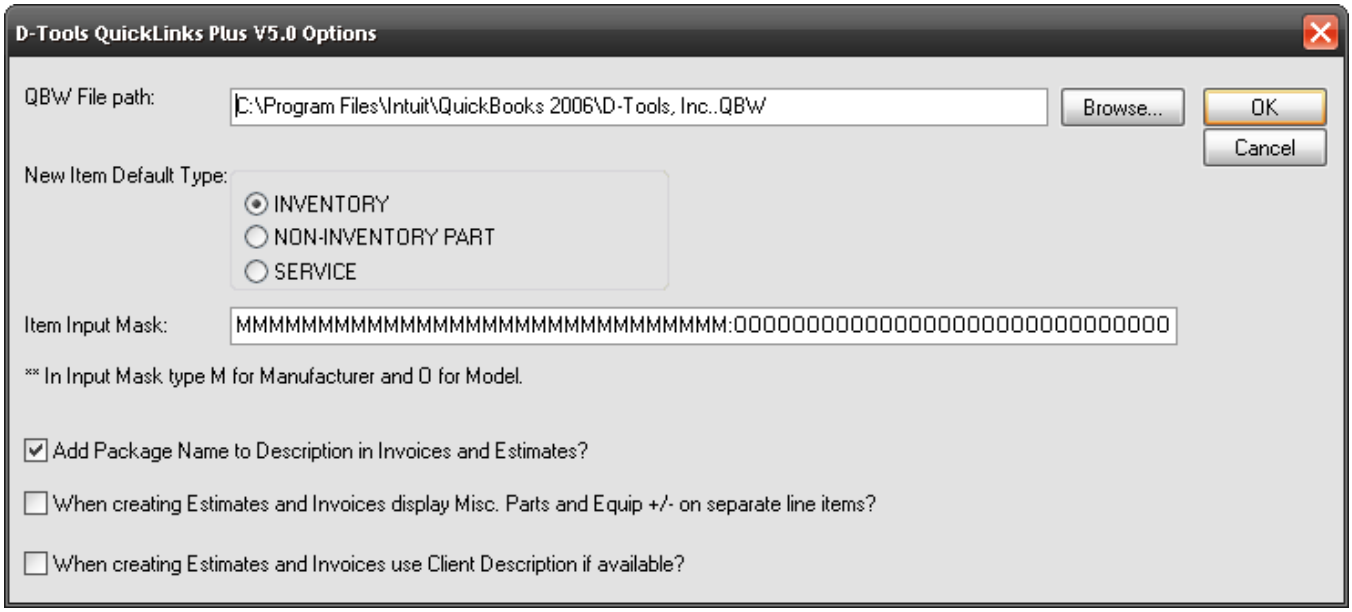
6) You will be prompted to select your region:



7) The D-Tools Quicklinks form will open. Click the **[Options...]** button:

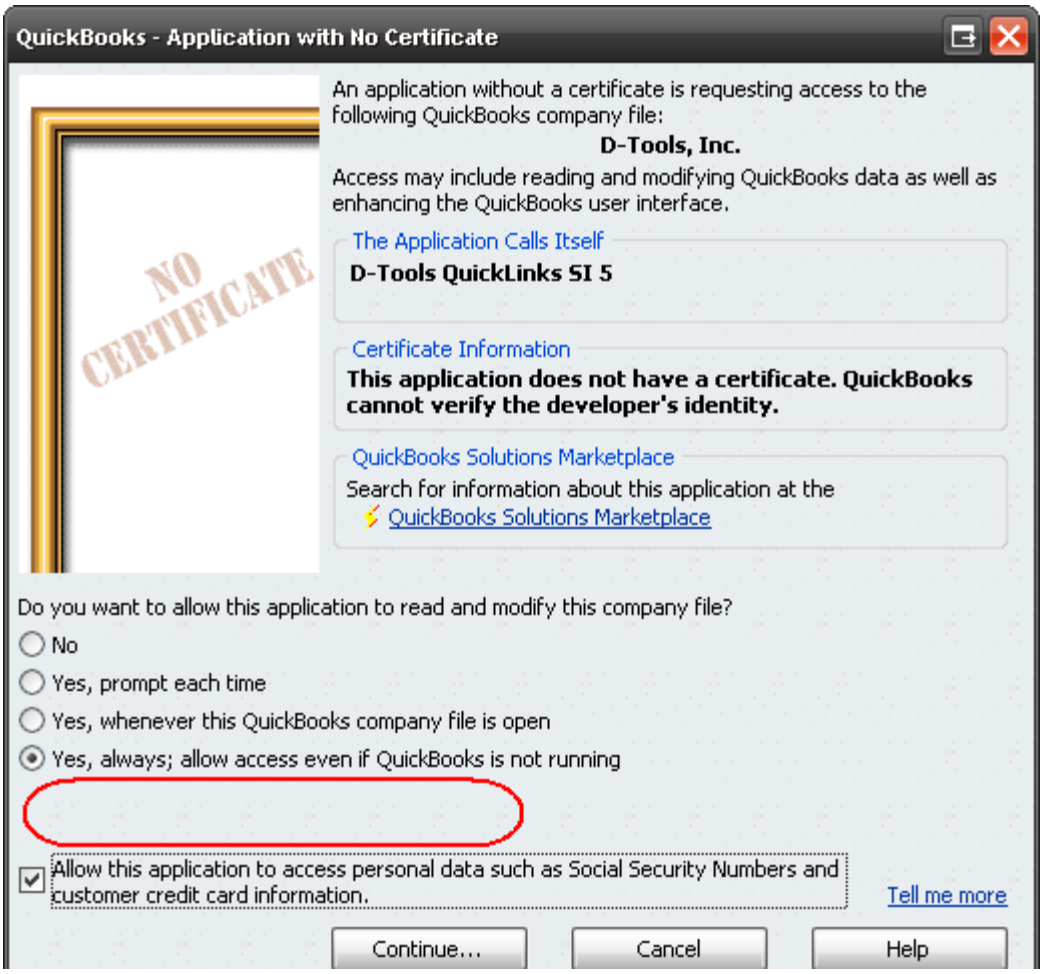


8) The following form opens. Use the **[Browse…]** button to navigate to your QuickBooks company file and select your defaults. When finished, click **[OK]**. For details on the "Item Input Mask", see the Pre-Implementation Guide chapter of the SI 5 User's guide.



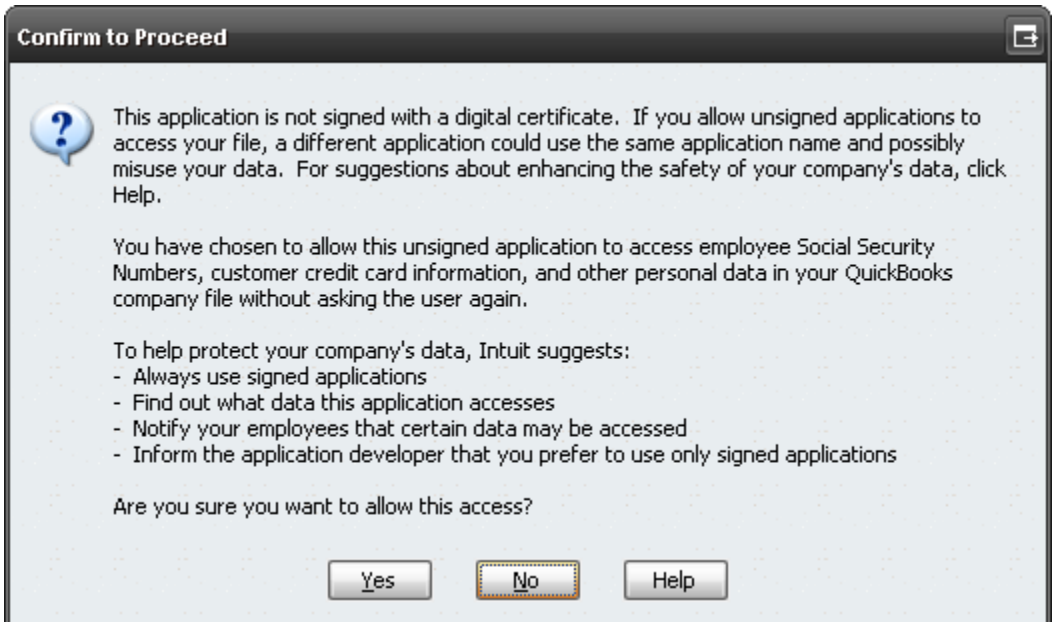
9) Click the **[Item List]** button:

10) If the QuickBooks window does not gain focus automatically, click it on your Task Bar. The following window will be open. Click the "Yes, always; allow access even if QuickBooks is not running" radio button and click the "Allow this application to access…" checkbox.

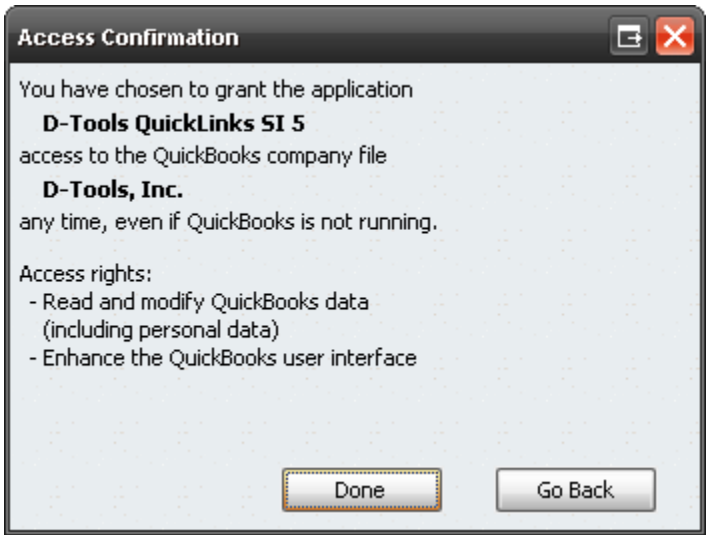


You may have the option to select a "Login as" user on this form where the red shape is. If you have this field, choose "Admin" from the dropdown.

11) Click **[Continue…]**. You will be prompted to allow access:



12) Click **[Yes]** and then click **[Done]** when prompted:



QuickLinks is now configured and ready to use. See the LinkTools section of the SI 5 User's Guide for details on using QuickLinks.