

START HERE (Professional)

1. Prepare for Installation

- ✓ **Have your CD-key ready.** This should be included with your packing slip, or contact 1-866-386-6571 x2 to have a copy emailed.
- ✓ **Print the Installation and Administration Guide.** You can find this on the CD in *Documents/Installation and Administration Guide.pdf*, or go to www.d-tools.com/index.php/user-guides for the latest version.
- ✓ **Begin on your server.** You will need to install the server components on the server PC first. This may or may not be the same PC you are installing the client components on.
- ✓ **You will need Windows Administrator privileges** to install. Contact your local system administrator for assistance if needed.
- ✓ **Disable anti-virus software** before installing.
- ✓ **Make sure you are connected to the internet.** Internet connection is required to verify your CD-key and install the software.

2. Install and Configure the Server

- ✓ **Insert the CD into the server you wish to install on.** If it does not open automatically, run *Install.hta* from the CD.
- ✓ **Select “Install System Integrator 5.5 Server”.** This will start the server installation.
- ✓ **The wizard will guide you through the remaining steps.** Be sure to write down or remember your Administration Console username and password, as well as the server name and port number.
- ✓ **Set Exceptions to the Windows Firewall** on the server. This is needed so that network users can access the database.
- ✓ **Set Sharing Permissions for the Product Shared Folder.** All users will need read and write access to the Product Shared Folder defined during the installation.

3. Register Licenses & Add Users

- ✓ **Log in to the SI5.5 Server Administration Console.** This should open automatically. If it does not, go to Start > Programs > D-Tools > SI5.5 Server Administration.
- ✓ **Click on the Register link** on the Start Page. You will be asked to enter your CD-key.
- ✓ **Add Users** by going to Users > Add New. All users will need a username and password to log in and use the software.
- ✓ **Define Group Permissions** by going to Groups > Manage Groups. By default all users are added to the Administrators group.

4. Install the Client

- ✓ **Install AutoCAD, Visio and/or QuickBooks prior to installing the SI5 desktop application.** If Visio is included in your purchase, you will find the installer on the CD.
- ✓ **Insert the CD into the PC you wish to install the client on.** If it does not open automatically, run *Install.hta* from the CD.
- ✓ **Select “Install System Integrator 5.5 Client”**
- ✓ **Choose Typical, Complete, or Custom installation.** Quicklinks users must choose Custom or Complete installation to install Quicklinks.

5. Set Up the Application

- ✓ **This only needs to be performed once,** by your D-Tools database administrator. Ordinary users can skip this and proceed to step 6.
- ✓ **Open the SI5 Client.** To log in, you will need a username and password (defined in step 3), as well as the server name and port (defined in step 2).
- ✓ **Run the Application Setup Wizard** from the Navigator to enter in company information, project defaults and other information about your business
- ✓ **Open Manage My Product Data** to setup your product database. Download or import new products and edit existing products using this interface.
- ✓ **Synchronize Your Data** by clicking Start > Sync Product Data. If you are the first one to do this, your local data (setup and products) will be copied up to the server. Otherwise, the server data will be downloaded to this PC.

6. Install Additional Clients

- ✓ **Install AutoCAD, Visio and/or QuickBooks prior to installing the SI5 desktop application.** If Visio is included in your purchase, you will find the installer on the CD.
- ✓ **Insert the CD into the PC you wish to install the client on.** If it does not open automatically, run *Install.hta* from the CD.
- ✓ **Select “Install System Integrator 5.5 Client”**
- ✓ **Choose Typical, Complete, or Custom installation.** Quicklinks users must choose Custom or Complete installation to install Quicklinks.
- ✓ **Open the SI5 Client.** To log in, you will need a username and password (defined in step 3), as well as the server name and port (defined in step 2).
- ✓ **Synchronize Your Data** by clicking Start > Sync Product Data. This will download the server data (setup and product database) to this PC.

6. Contact D-Tools for Assistance

- ✓ **Contact D-Tools support at 866-386-6571 x2 or email support@d-tools.com** if you have any difficulty installing your software. **Hours are M-F 8am-8pm ET.**
- ✓ **See the D-Tools Website (www.d-tools.com)** for updated product information, including Users Guides, optional reports, and more.
- ✓ **Visit the D-Tools Forum (www.d-tools.us)** for discussion about known bugs and other information about new releases.
- ✓ **Search the D-Tools Blog (www.d-toolsblog.com)** for interesting articles about how to get more out of SI5.5.
- ✓ **You can submit a bug report** by emailing bugs@d-tools.com at any time.