

DOVICO Planning & Timesheet v3

INSTALLATION GUIDE



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System Requirements

Deployment Options

Either installed on your server or use DOVICO'S [hosted application service](#)

For all Hosted or Installed users

Workstation (End-User) requirements

- A computer with an HTML web browser (optimized for Internet Explorer 7 or greater)
 - ✓ Internet Explorer 7 or greater, Firefox 4, Chrome 11 or Safari 5
 - ✓ A web browser supporting ActiveX controls (when using the Microsoft Project Link)
 - ✓ Microsoft Silverlight 4.0 or higher (when using the Project Planning tool)
 - ✓ JavaScript and cookies enabled
 - ✓ Popup blockers disabled or have the site where DOVICO Planning & Timesheet is installed designated as safe in the popup blocker's settings
- Network/Internet connectivity
- Adobe Reader version 5.1 or above
- For Offline Timesheet functionality: If a user's My Documents folder is located on a remote server, that computer must be configured to use "offline files".

When using DOVICO Planning & Timesheet on a Mac operating system, there are some functional limitations. The Offline Timesheet function, the Microsoft Project Link, the QuickBooks Link and the Import/Export tool will not work on a Mac operating system.

For Installed option only

Operating systems

Compatible with Microsoft Windows 2003, XP Professional (Service Pack 3), Vista (Service Pack 1), Windows 7, Windows Server 2008 and Windows Server 2008 R2.

Minimum Server Requirements

- Pentium 4 - 1.4 GHz
- IIS (Internet Information Services)
- .NET 2.0 (included with DOVICO Planning & Timesheet)
- SQL Express 2005 (included with DOVICO Planning & Timesheet)
- 256 MB RAM
- 300 MB free hard drive space on the targeted partition (the destination DOVICO Planning & Timesheet will be installed)
- 250 MB free hard drive space on the operating system's partition
- Network connectivity (TCP/IP)
- File and Printer Sharing for Microsoft Networks

Optimal Server Requirements

- Single processor with 1.4 GHz (x64 processor) or 1.3GHz (Dual Core)
- .NET 2.0 (included with DOVICO Planning & Timesheet)
- SQL Server 2005, SQL Server 2008 or SQL Server 2008 R2
- 2 GB RAM
- 300 MB free hard drive space on the targeted partition (the destination the software will be installed)
- 250 MB free hard drive space on the operating system's partition
- Network connectivity (TCP/IP)
- File and Printer Sharing for Microsoft Networks

NEW INSTALLATION

Important Notes

1. This section of the guide is intended for **those installing** DOVICO Planning & Timesheet – a new installation. If you are migrating from an existing version of DOVICO Planning & Timesheet, then follow the instructions on page 4.
2. DOVICO Planning & Timesheet requires either SQL Express 2005, SQL Server 2005 or SQL Server 2008 as the database engine. SQL Express 2005 is included with the software, but you may use your existing SQL Express 2005 or SQL Server 2005 installations. SQL Server 2008 can also be used.
3. During the Installation process, you may be required to reboot your server/computer.

Preliminary Steps

1. IIS (Internet Information Services) must be installed on the target machine prior to installing the software.
 - If installing on a **Windows XP** operating system, please search for '**DV1093**' on our Knowledge base <http://www.dovicofiles.com/kb>
 - If installing on a **Windows 7 or Vista** operating system, please search for '**DV1111**' on our Knowledge base <http://www.dovicofiles.com/kb>
2. If you are using **Windows XP 64 bit** or **Windows Server 2003** and above, then verify that the Web Service Extension for ASP.NET 2.0 is set to 'Allow' rather than 'Prohibit'.
 - a. Go to **Control Panel > Administrative Tools > Internet Information Services**.
 - b. Expand the local computer, and then click the **Web Service Extensions** folder.
 - c. In the details pane, click the **ASP.NET 2.0 extension**.
 - d. Click **Allow**.
3. If you are using SQL Server 2005, DOVICO Planning & Timesheet requires **Mixed Authentication** configuration. Windows Only Authentication is not supported.

Installation steps

1. On the server/computer where the software will be installed, close all open applications, shut down any non-system critical services and stop all Anti-Virus/Anti-Spyware software. Failing to perform this step may cause installation problems.
2. Run the installation file (PlanningAndTimesheetV3.exe).
3. You may be prompted to install a Crystal Reports 2008 Runtime service pack. The Crystal Reports wizard will guide you through these steps and then return to the DOVICO installation process.
4. Typical prompt windows and questions are displayed during the DOVICO installation. The following (3a - 3c) describes a few prompts and questions that are particular to DOVICO Planning & Timesheet.
 - a. On the Setup Type screen, select **Typical** and click **Next**. The Web Services API option installs additional components, which can be used by developers for custom programming.
 - b. Configure Application Sharing (Windows Firewall): You may be prompted to open the **HTTP** port on the Windows Firewall. Select **Yes** and click **Next**. If you select No then no other users will be able to access the application.
 - c. Upgrading from a previous version? Select **No** if prompted about upgrading from a previous version.

5. On the **Installation Wizard Complete** screen, click **Finish**.
6. After a few moments, the **Installing/Configuring SQL Express** screen is displayed. From this point you have the option to **(A)** install SQL Express 2005 or **(B)** use an existing SQL Server 2005 or SQL Express 2005 installation.

Option A:

- a. Select the **Install SQL Express** option.
- b. Note the default installation directory or use the **Browse** button to install to a different directory.
- c. Enter a password with a length and complexity appropriate with your network's security policy.
- d. Click **OK**.

Option B:

- a. Select the **"I already have a SQL Server 2005 or Express installation I wish to use"** option.
- b. Enter the **SQL Server Name, SQL User ID and Password**.

Important: The following (step c) is only required if you are configuring the software to use a remote SQL Server located on a different server.

- c. Enter the **Database path** on the **SQL Server**. This must be a Local Drive Path as it exists on the remote server. It cannot be a UNC or Mapped Network Drive Path. (**ex.** C:\Program Files\Microsoft SQL Server\MSSQL\Data)
 - d. Click **OK**.
7. You may be prompted to **permit access** to the database from other computers within your network. Select **Yes** to allow administrative users on other computers to access the database when linking data using the QuickBooks or Import/Export integration utilities.

Notes:

- ✓ You may be required to reboot your computer at this point.
8. Before using DOVICO Planning & Timesheet, each user's web browser **popup blocker** should either be disabled or have the site where the software is installed flagged as a safe site.
 9. When the installation is complete, select **Start > All Programs > DOVICO Planning & Timesheet > DOVICO Planning & Timesheet**
 10. When you start DOVICO Planning & Timesheet for the first time, the software will prompt you to create an **Administrator Account**. Take careful note of the User ID and Password you enter.

IMPORTANT: If there are difficulties with the installation, an alternative is to perform a clean/complete uninstall of the software (see page 10) and attempt the installation again.

UPGRADE – from previous version

IMPORTANT NOTICE

A number of important changes to some views and tools are included in this new version. Before the decision to upgrade is made, these changes should be reviewed with all DOVICO Planning & Timesheet administrators and managers.

The following highlights the major changes. The full list is available on our website at http://www.dovico.com/whats_changed_dpt3.aspx.

Rates

How rates are created, assigned to employees and administered has changed considerably.

- ✓ Hourly rates are now entered directly into each employee's profile.
 - ✓ Overtime Rates are now directly assigned to employees using the employee profile.
 - ✓ The Rates view found in previous versions is removed. When upgrading, the 'named' rates are converted to values in employee profiles.
- Reports:
 - ✓ Custom built reports prepared for previous versions may not work in DOVICO Planning & Timesheet version 3. Custom built reports showing wage and charge out rates will likely have to be manually fixed.
 - ✓ For installed (on-premise) clients only: After the upgrade, any custom reports or custom folders created for the previous version are placed in a new folder (Custom Reports). By default, only administrators have access to these reports and you must manually move them to their previous folder locations and re-apply security access as required.
 - The previous Currencies view used for the currency calculator has been replaced by the new Currencies functionality. The new Currencies view is only available to the Administrator Security Group.
 - The Archive function has been removed from the software.

For the person upgrading the software – Important Notes

- This section of the guide is intended for those upgrading from **DOVICO Planning & Timesheet version 2**. If replacing Track-IT Suite, contact DOVICO Support. If this is a new installation, then follow the instructions on page 2.
- A new registration key is required. Contact Sales to obtain a new registration key. sales@dovico.com
- During the Installation process, you may be required to reboot your server/computer.
- Some users may experience problems related to cached files in their web browsers. Clearing the browser's temporary cached files normally corrects these problems.

Upgrading from DOVICO Planning & Timesheet version 2

Preliminary Steps

1. Any employees who are using the Offline Timesheet must return to **Online operation**, submit their time and not return to Offline mode until the upgrade is complete.
2. Any employees who have used the Offline Timesheet, the QuickBooks or Import/Export Links should delete the contents of their 'DOVICO Applications' folder (in \Documents or \My Documents) before using the upgraded version.

Remove DOVICO Planning & Timesheet

1. **Backup** all DOVICO Planning & Timesheet databases to a **safe location** on your computer. A location other than DOVICO's default installation directory.
2. Go to Start > Control Panel > Administrative Tools > Services and **stop** the **DOVICO Job Scheduler** service (if applicable).
3. Select **Start > Control Panel > Programs and Features (Add or Remove Programs)**.
4. Any DOVICO Service packs must be removed first. They must be removed in the reverse order in which they were installed (e.g. Service Pack 3 first, Service Pack 2 second, etc...).
5. Un-install **DOVICO Planning & Timesheet**.

Installation steps

1. Download the installation file from <http://www.dovico.com/download.aspx>
2. Close all open applications, shut down any non-system critical services and stop all Anti-Virus/Anti-Spyware software. Failing to perform this step may cause installation problems.
3. Run **PlanningandTimesheetV3.exe** and follow the setup instructions.
4. You may be prompted to install a Crystal Reports 2008 Runtime service pack. The Crystal Reports wizard will guide you through these steps and then return to the DOVICO installation process.
5. Typical prompt windows and questions are displayed during the installation. The following (3a - 3c) describes a few prompts and questions which are particular to DOVICO Planning & Timesheet.
 - a. On the Setup Type screen, select **Typical** and click **Next**. The Web Services API option installs additional components, which can be used by developers for custom programming.
 - b. Configure Application Sharing (Windows Firewall): You may be prompted to open the **HTTP** port on the Windows Firewall. Select **Yes** and click **Next**. If you select No then no other users will be able to access the DOVICO Planning & Timesheet application.
 - c. Upgrading from a previous version? Select **Yes** if prompted about upgrading from a previous version.
6. On the **Installation Wizard Complete** screen, click **Finish**.
7. Database Engine configuration:
 - a. Based on the existing MSDE/SQL installations detected on the computer, you will be notified, or offered options, to upgrade your DOVICO shared instance of MSDE to SQL Express 2005, install SQL Express 2005 or use your existing SQL Server 2005 or existing SQL Express installation.

Notes:

- ✓ You may be required to reboot your computer at this point.
- ✓ If upgrading MSDE to SQL Express 2005, this process will begin after the reboot. This upgrade process can be lengthy in duration (>10 minutes) and it may initially appear that the computer is inactive. A series of windows will guide you through the process.

8. When the Installation wizard is complete, select **Start, All Programs, DOVICO Planning & Timesheet, DOVICO Planning & Timesheet.**
9. DOVICO Planning & Timesheet will detect your previous database and display a message stating that the database must be upgraded, choose **OK.**
10. If your database does not appear, try login into the Database Manager and reviewing the database's Status column. Using the Synchronize database.config option may be required to reconnect the database.
11. Log into the database and register the database using the new registration key.
12. Verify the database's Regional Setting. (Menu > Setup tab> Database Options> General tab).
13. Repeat step 9 though 12 for each available database.

IMPORTANT: If there are difficulties in upgrading using the steps described above, an alternative is to perform a clean/complete uninstall of DOVICO Planning & Timesheet (see page 10), install DOVICO and manually restore/attach the databases.

MIGRATE – from DOVICO Timesheet

If migrating from **DOVICO Timesheet version 11:**

1. Create a **backup** of your DOVICO Timesheet database and store it in a safe location.
2. **Re-register** the software using the DOVICO Planning & Timesheet registration key.
3. Log out and log back in.
4. Verify the database's Regional Setting. (Menu > Setup tab> Database Options> General tab).
5. Repeat steps 2 and 4 for each available database.

That is it. You have migrated from DOVICO Timesheet to DOVICO Planning & Timesheet.

6. All the instructions that follow are intended for those migrating from **DOVICO Timesheet versions 10 and below.**

For current users of **DOVICO Timesheet versions 10 and below**, there are a number of important changes to some views and tools included in this new version.

The full list of changes is available on our website at http://www.dovico.com/whats_changed_dpt3.aspx.

These should be reviewed with all DOVICO administrators and managers.

For the person upgrading the software – Important Notes

- This section of the guide is intended for those migrating from **DOVICO Timesheet versions 8, 9 or 10**. If replacing Track-IT Suite, contact DOVICO Support. If this is a new installation, then follow the instructions on page 2.
- Your existing DOVICO Timesheet installation cannot reside on the same server/computer as DOVICO Planning & Timesheet. The following instructions detail how to remove your current installation and install the new software.
- If replacing DOVICO Timesheet **version 9 or 10**, there are no additional/new database engine (SQL) requirements or changes.
- If replacing DOVICO Timesheet **version 8**, it required either SQL2000 or MSDE as the database engine. From this point on, either SQL2005, SQL2008 or SQL Express 2005 are required. SQL Express 2005 is included with DOVICO Planning & Timesheet.
 - If you are currently using MSDE, the upgrade will offer the option to upgrade MSDE to SQL Express 2005.
 - If you are currently using SQL2000 and do not want to purchase SQL2005/2008, you can install and use SQL Express 2005.
- A new registration key is required. Contact Sales to obtain a new registration key. sales@dovico.com
- During the Installation process, you may be required to reboot your server/computer.

Migrate from DOVICO Timesheet to Planning & Timesheet

The following steps describe how to migrate from DOVICO Timesheet versions 8, 9 or 10 to DOVICO Planning & Timesheet.

Upgrading from version 8:

Notes about the Database Engine

- If you are currently using a DOVICO shared instance of MSDE, the installation will offer the option to automatically upgrade from MSDE to SQL Express 2005.
- If you are using MSDE but not a DOVICO shared instance, a .bat file is available to upgrade MSDE to SQL Express 2005 after the installation is complete.
- If you are currently using SQL2000 and do not want to purchase SQL2005, you can install DOVICO Planning & Timesheet and use SQL Express 2005. You will be required to manually restore/attach your databases.
- If you have upgraded your current SQL2000 to SQL2005, the DOVICO databases will have remained attached and therefore immediately accessible by DOVICO Planning & Timesheet. If SQL2005 is a new installation then the database files will need to be 're-attached'.

Preliminary Steps

1. Any employees who are using the Offline Timesheet must return to **Online operation**, submit their time and not return to Offline mode.
2. For version 8 and 9 users only: Please ensure that any expenses entered but not submitted are **submitted and approved**. This is to ensure that the new expense sheet naming convention is properly applied. Note: All approved expenses will be flagged as 'Reimbursed' in the Approved Expenses view.
3. Any employees how have used the Offline Timesheet, the QuickBooks or Import/Export Links should delete the contents of their 'DOVICO Applications' folder (in \Documents or \My Documents) before using the upgraded version.

Remove DOVICO Timesheet

1. **Backup** all DOVICO Timesheet databases to a **safe location** on your computer. A location other than DOVICO's default installation directory.
2. Go to Start > Control Panel > Administrative Tools > Services and **stop** the **DOVICO Job Scheduler** service (if applicable).
3. Select **Start > Control Panel > Programs and Features (Add or Remove Programs)**.
4. Any DOVICO Timesheet Service packs must be removed first. They must be removed in the reverse order in which they were installed (e.g. Service Pack 3 first, Service Pack 2 second, etc...).
5. Un-install **DOVICO Timesheet**.

Installation steps

1. On the server/computer where DOVICO Planning & Timesheet will be installed, close all open applications, shut down any non-system critical services and stop all Anti-Virus/Anti-Spyware software. Failing to perform this step may cause installation problems.
2. Run the installation file (PlanningAndTimesheetV3.exe).
3. You may be prompted to install a Crystal Reports 2008 Runtime service pack. The Crystal Reports wizard will guide you through these steps and then return to the DOVICO installation process.

4. Typical prompt windows and questions are displayed during the installation. The following (3a - 3c) describes a few prompts and questions which are particular to DOVICO Planning & Timesheet.
 - a. On the Setup Type screen, select **Typical** and click **Next**. The Web Services API option installs additional components, which can be used by developers for custom programming.
 - b. Configure Application Sharing (Windows Firewall): You may be prompted to open the **HTTP** port on the Windows Firewall. Select **Yes** and click **Next**. If you select No then no other users will be able to access the DOVICO Planning & Timesheet application.
 - c. Upgrading from a previous version? Select **Yes** if prompted about upgrading from a previous version.
5. On the **Installation Wizard Complete** screen, click **Finish**.
6. After a few moments, the **Installing/Configuring SQL Express** screen is displayed. From this point you have the option to **(A)** install SQL Express 2005 or **(B)** use an existing SQL Server 2005 or SQL Express 2005 installation.

Option A:

- a. Select the **Install SQL Express** option.
- b. Note the default installation directory or use the **Browse** button to install to a different directory.
- c. Enter a password with a length and complexity appropriate with your network's security policy.
- d. Click **OK**.

Option B:

- a. Select the **"I already have a SQL Server 2005 or Express installation I wish to use"** option.
- b. Enter the **SQL Server Name, SQL User ID** and **Password**.

Important: The following (step c) is only required if you are configuring DOVICO Planning & Timesheet to use a remote SQL Server located on a different server.

- c. Enter the **Database path** on the **SQL Server**. This must be a Local Drive Path as it exists on the remote server. It cannot be a UNC or Mapped Network Drive Path. (ex. C:\Program Files\Microsoft SQL Server\MSSQL\Data)
- d. Click **OK**.

7. You may be prompted to **permit access** to the database from other computers within your network. Select **Yes** to allow administrative users on other computers to access the database when linking data using DOVICO Planning & Timesheet's QuickBooks or Import/Export integration utilities.

Notes:

- ✓ You may be required to reboot your computer at this point.
8. Before using DOVICO Planning & Timesheet, each user's web browser **popup blocker** should either be disabled or have the site where the software is installed flagged as a safe site.
 9. When the Installation is complete, select **Start, All Programs > DOVICO Planning & Timesheet > DOVICO Planning & Timesheet**.
 10. DOVICO will detect your previous database and display a message stating that the database must be upgraded, choose **OK**.
 11. Log into the database and register the database using the new registration key.
 12. Verify the database's Regional Setting. (Menu > Setup tab> Database Options> General tab).
 13. Repeat steps 10 through 12 for each available database.

Performing a clean un-install of DOVICO software

Remove DOVICO Timesheet (or DOVICO Planning & Timesheet)

1. **Backup** all DOVICO databases to a **safe location** on your computer or server. This safe location **CANNOT BE** in DOVICO's default installation directory (\Program Files\DOVICO Software) as this folder will be deleted in upcoming steps.
2. Go to Start > Control Panel > Administrative Tools > Services and **stop** the **DOVICO Job Scheduler** service (if applicable).
3. Login to DOVICO's **Database Manager** and delete all DOVICO databases.
4. Select **Start > Control Panel > Programs and Features (Add or Remove Programs)**.
5. Any DOVICO Service packs must be removed first. They must be removed in the reverse order in which they were installed (e.g. Service Pack 3 first, Service Pack 2 second, etc...).
6. Un-install **DOVICO Timesheet** (or **DOVICO Planning & Timesheet**)

Remove DOVICO shared instance of MSDE/SQL Express 2005

IMPORTANT: The following steps should not be performed if MSDE or SQL Express is in use by any other application.

1. Select **Start > Control Panel > Add or Remove Programs**.
2. Un-install the database engine used by the DOVICO software. Either the DOVICO shared instance of **Microsoft SQL Express 2005** or the **DOVICO instance of Microsoft SQL Server 2005**.

Remove DOVICO folders

1. Go to `\inetpub\wwwroot` and delete the **dovtimesheet** virtual directory.
2. Go to the DOVICO installation directory (by default C:\Program Files\) and delete the **DOVICO Software** folder.

Cleaning up left over registry entries

WARNING: The following steps require you to use Registry Editor. If you use Registry Editor incorrectly, you may cause serious problems that may require you to reinstall your operating system. DOVICO cannot guarantee that you can resolve problems that result from using Registry Editor incorrectly. Use the Registry Editor at your own risk.

Note: The following registry keys may not exist with every installation.

1. Select **Start, Run**, type `regedit` and click **OK**.
2. Navigate to the following registry key.
HKEY_CURRENT_USER\Software
➤ Right click on any **DOVICO** folder and select **Delete**.
3. Navigate to the following registry key.
HKEY_LOCAL_MACHINE\Software
➤ Right click on any **DOVICO** folder and select **Delete**.

Technical Support, Resources and Documentation

DOVICO Technical Knowledge Base

To find answers to common problems, go to our Knowledge Base for all the latest information regarding errors, installation problems, upgrade instructions and the latest technical documentation.

<http://www.dovicofiles.com/kb>

DOVICO Technical Support

If you require technical assistance with your software or you would like to report any problem that you may be experiencing with our products, please see our support form to submit a technical support request by email or contact technical support by phone at (506) 855-4154.

Toll Free North America: 1-800-618-8463
Toll Free International: 00 800 4618 8463

<http://www.dovico.com/support.aspx>