ServiceCEO Installation Guide

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Installation Guide

Thank you for purchasing ServiceCEO® and welcome to the Insight Direct family!

The following sections are designed to walk you through the installation process. Our customers have found that following these steps is the most successful way to install the program.

It will take you about 30 minutes to install ServiceCEO.

Requirements for Installing ServiceCEO

If you are going to use ServiceCEO on multiple computers connected together on a network, only one of these computers needs to install SQL. To determine which version of SQL you should install, see the Should I Install ServiceCEO with the MSDE or the Full Version of SQL Server? section below.

Please disable any virus protection software you have running before installing ServiceCEO. Running such software during installation may interfere with the installation process.

System Requirements

Any computer running the application should have or use:

- The Windows XP or 2003 operating systems. We recommend using Windows XP for optimal performance.

- Pentium 2 GHz with at least 512 MB of RAM.

Tip:
For more on our computer recommendations, please see the System Requirements page of our website, located at http://www.insightdirect.com/products_system.html.

Should I Install ServiceCEO with the MSDE or the Full Version of SQL Server?

ServiceCEO ships with a managed version of Microsoft® Desktop Engine called MSDE. Most users install this server, which automates many of the complex configuration and maintenance tasks involved in managing a database. However, the MSDE does have some performance limitations:

- Maximum database size of two gigabytes (GB)

- Uses up to two processors

- Limited to eight concurrent executing operations per instance

- 32,767 concurrent connections

- 32,767 databases per instance

- 16 instances per server

- Only uses up to two GB of Random Access Memory (RAM)

- The Workload Governor. Whenever the MSDE exceeds eight concurrently executing operations, MSDE invokes the workload governor. Invoking the governor delays query execution which, in turn, usually creates more concurrent queries, resulting in very long running queries.

The end result of these limitations is that if you have more then five regular users of ServiceCEO, you could experience a dramatic decrease in performance if you continue to use the MSDE. Using the full version of SQL Server™ 2000 to host one or more ServiceCEO databases will prevent this performance degradation, including:

1. No size limit is enforced on your databases. With SQL 2000 Server, your database size is limited primarily by your hardware.

2. No limit on the number concurrent executing operations per instance exists. Users of SQL 2000 Server purchase a base license (typically the SQL Server Standard Edition with 10 Client Access Licenses (CALs)) and purchase additional CALs as they need them.

3. Use of multiple processor machines. SQL Server 2000 supports up to 32 Central Processing Units (CPUs) and 64 GB of RAM.

Note that when using SQL Server 2000, the ServiceCEO backup and restore tools may not function properly. You will need to use regular SQL Server tools like Enterprise Manager and Query Analyzer to backup and restore your database. For details, please read your SQL documentation.

Next Topic:

   - To install ServiceCEO with the MSDE, read the Installing ServiceCEO with MSDE topic.

  - To install ServiceCEO with SQL Server 2000, read the Installing ServiceCEO with the full SQL Server topic.

Installing ServiceCEO with MSDE

The SQL Desktop Engine should be located on either the server or, if you do not have a server, the computer with the most current Microsoft® Operating System.

> *Note:*
> If you do not have the ServiceCEO CD, but have instead the ServiceCEO Full Installer, double-click the install file and go to step three.
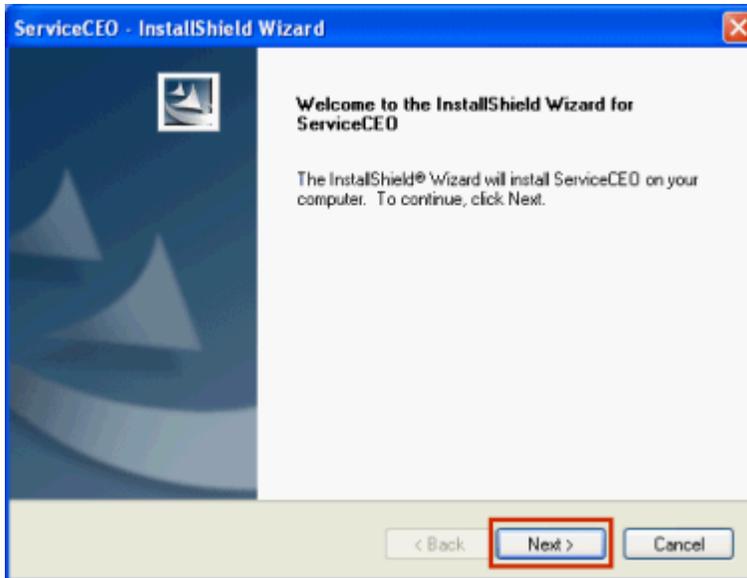
To install ServiceCEO:

1. Insert the ServiceCEO CD into your computer. A welcome page appears.
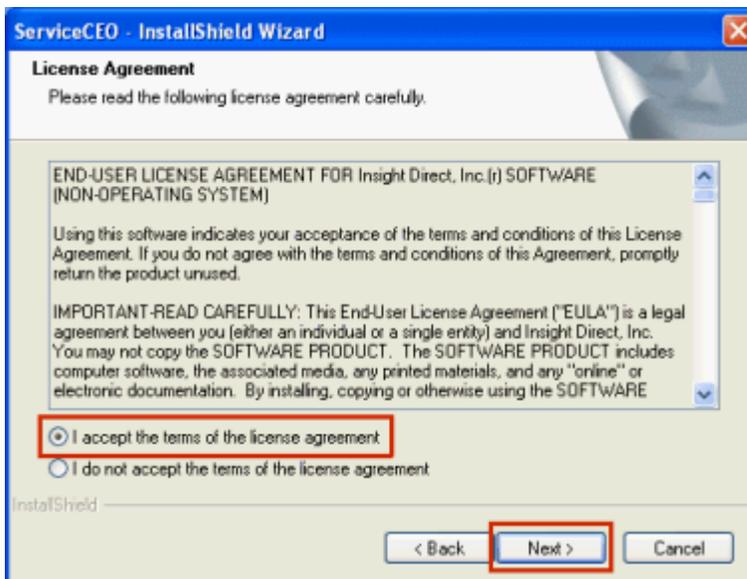
2. Click **Install ServiceCEO**. The Welcome to the InstallShield Wizard for ServiceCEO page appears.
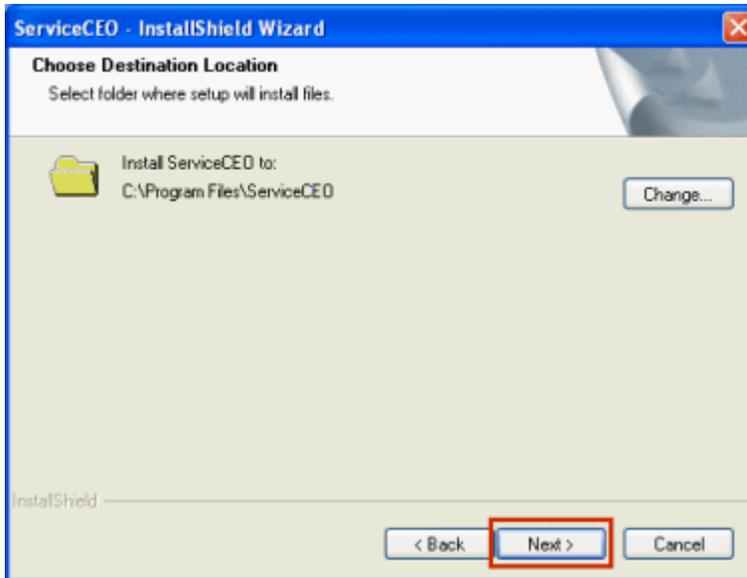
3. Click **Next**. The License Agreement page appears.

4. Read the entire license agreement by scrolling down.

5. If you accept the conditions described in the license agreement, click the **I accept the terms of the license agreement** option button. If not, you will not be able to install ServiceCEO.

6. Click **Next**. The Choose Destination Location page appears.

To make any changes to the system Domain Server Name (DSN) configuration for ServiceCEO and the MSDE, you will need to be logged into the computer as the Windows Administrator.

> *Tip:*
> ServiceCEO's default installation location is **C:\Program Files\ServiceCEO**. If you want to change the installation location, click **Change...**. The Choose Folder dialog box will appear. Navigate to and select the folder on your computer where you want to install ServiceCEO. Click **OK** to change the location. The new location will appear on the Choose Destination Location page.
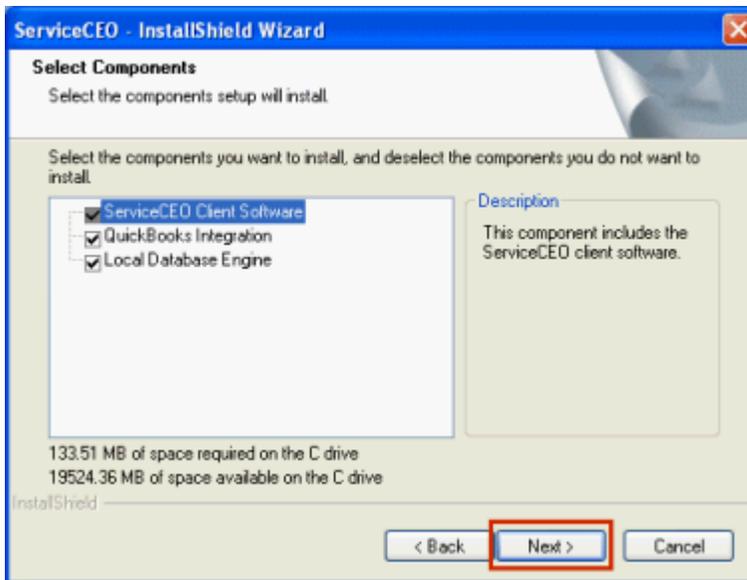
> *Caution:*
> If, for whatever reason, you need to run the ServiceCEO installer again or upgrade the program at any point, be sure you select the same directory that you selected on the Choose Destination Location page. If another directory is selected, you will install ServiceCEO into two separate directories, and the program may not run as expected.

7. Click **Next**. The Select Components page appears.

There are three check boxes you can select on this page:

- **ServiceCEO Client Software.** Select this check box to install the ServiceCEO software on this computer.

- **QuickBooks Integration.** Select this component to install QBFC3, the QuickBooks Integration Pack that will integrate ServiceCEO with the U.S. version of QuickBooks.

  Caution:
  If you are using the Canadian version of QuickBooks, DO NOT select the QuickBooks Integration check box. Selecting this check box will generate errors when you use QuickBooks with ServiceCEO. To get the Canadian version of QuickBooks to integrate with ServiceCEO, you will need to install one of Intuit's Service Packs. Run this file after the ServiceCEO installation has completely finished. For more information, see the Integrating QuickBooks section.
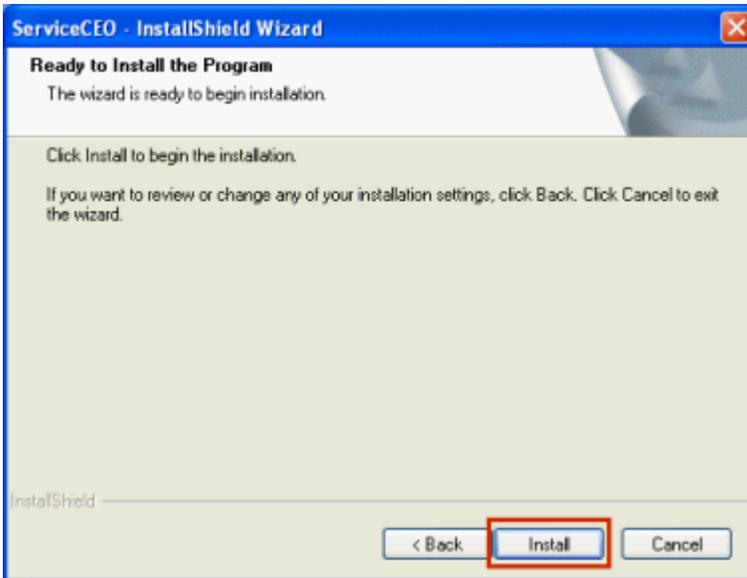
- **Local Database Engine.** Select this component if you are installing a ServiceCEO database on this computer. The installer will load the Microsoft® Desktop Engine onto this computer. The MSDE is required for single-system installations, but, in a networked installation, should only be installed on the computer hosting the database. Thus, if you will be running ServiceCEO on one computer but accessing (via a network) a ServiceCEO database located on another computer, deselect this check box.
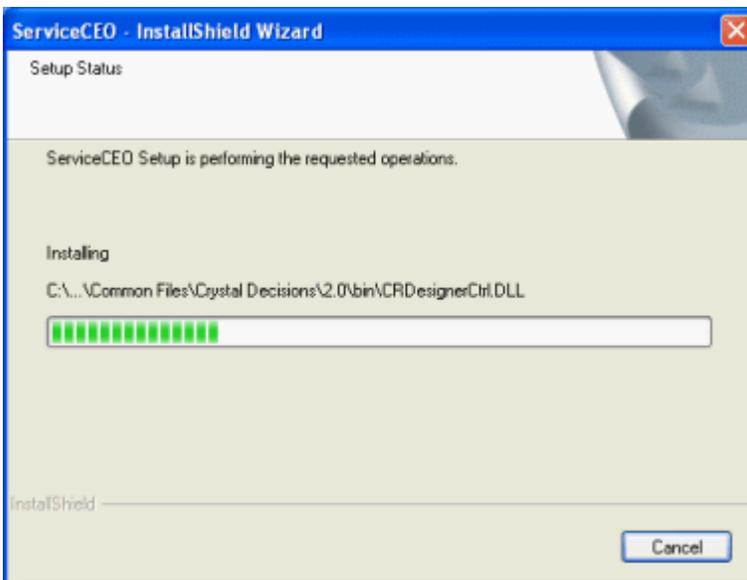
  Caution:
  If you already have a full version of SQL Server installed, or if you would like to install SQL Server on a drive other than your C:\ drive, do not select the Local Database Engine check box. When installation is complete, follow the steps detailed in the Installing ServiceCEO with the full SQL Server section.

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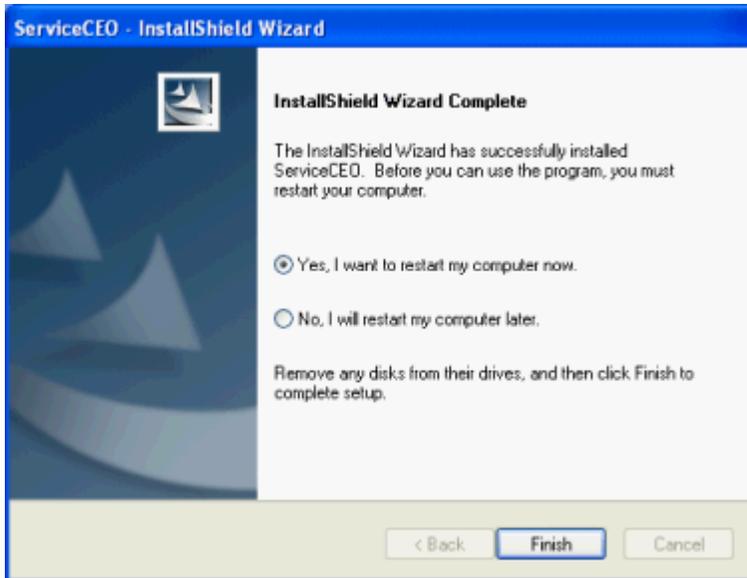
8. By default, all of the check boxes are selected on the Select Components page. If necessary, deselect the appropriate check boxes.

9. Click **Next**. The Ready to Install the Program page appears.

10. Click **Install**. The program starts to install. The installation progress displays on the Setup Status page.

When the installation finishes, the Installation Completed page appears.

11. Select the appropriate option button. If you select the **Yes** option button, your computer will automatically reboot after you close the InstallShield Wizard. If you select the **No** option button, you will have to reboot your computer yourself before the application will be installed.

12. Click **Finish**. The InstallShield Wizard will close. If you selected Yes in step 11, your computer will reboot.

Note:
    You will have to reboot your computer before continuing.

If you are not installing a ServiceCEO database, the installation is complete. If you are installing a ServiceCEO database, continue to the Setting up a Database section.

Setting up a Database

Note:
    If you will be accessing a ServiceCEO database over a network, you do not need to set up a database on this computer. Click **Cancel** now.

Installing the SQL Server Desktop Engine

Once your computer has rebooted, the ServiceCEO Database Setup Wizard will start automatically.

> *Tip:*
> If, for any reason, you need to exit this wizard before the database is setup, you can reopen it by selecting **Start > Programs > ServiceCEO > Local Database Engine Configuration**.

1. Click **Next**. The second page of the ServiceCEO Database Setup Wizard appears.

2. After reading the text on this page, click **Next**. The third page of the ServiceCEO Database Setup Wizard appears.

Note:
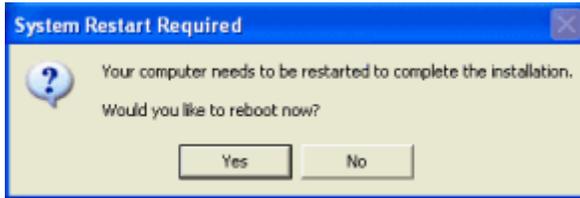
When the SQL Server Desktop Engine is installed, the computer hosting the ServiceCEO database (the Server computer) will display an icon in the taskbar: . This means that the SQL Desktop Engine is running on the computer. Since ServiceCEO will not operate correctly unless the Desktop Engine is running on the server computer, you should keep the SQL Desktop Engine open at all times.

3. After reading the text on this page, click **Next**. The fourth page of the ServiceCEO Database Setup Wizard appears.

4. Click **Next**. Microsoft SQL Server Desktop Engine will start to install. When complete, the System Restart Required dialog box appears.

5. Click **Yes**. Your computer will reboot.

Caution:
If you click **No** in the System Restart Required dialog box, you will need to reboot your computer before the Microsoft SQL Server Desktop Engine is completely installed.
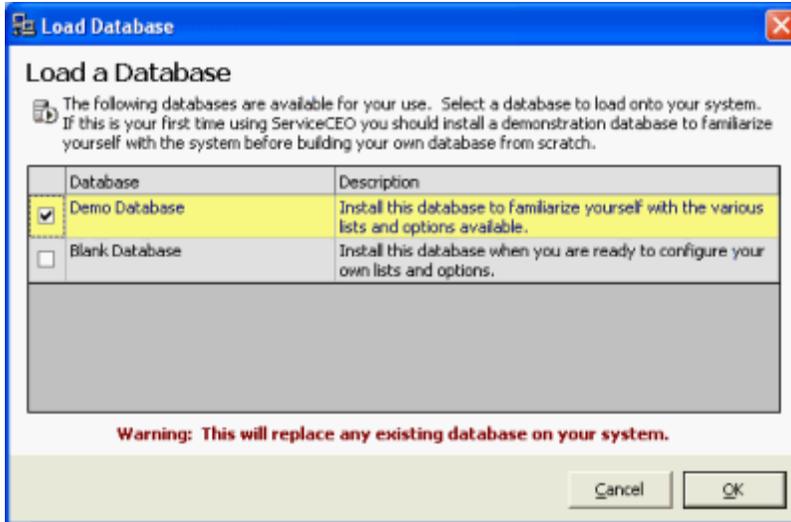
Creating the Database

When your computer restarts, the ServiceCEO Database Setup Wizard will automatically start running. As it configures the database, you will see a progress page:

After several processes have run, the Load Database dialog box appears:
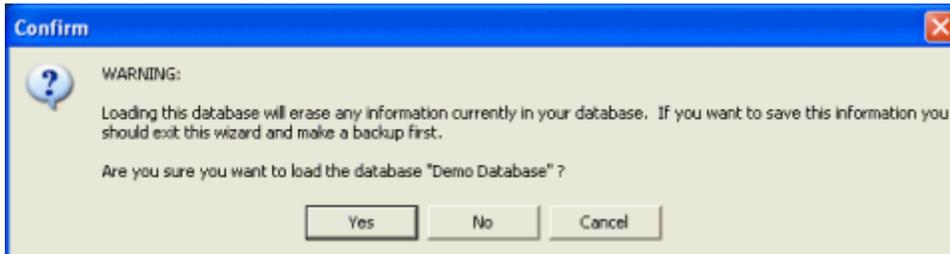
1. Select the check box of the database you want to load.

    Tip:
    Since ServiceCEO is so configurable, we highly recommend that you start by loading the Demo Database so that you can learn how to use and learn ServiceCEO in a safe environment. The Demo Database contains sample data - multiple customer records, jobs, schedules, employees, etc. - that, when loaded, enables you to work with and use all of ServiceCEO's functionality without worrying about making mistakes on your real business data. It gives you the opportunity to create customers, schedule jobs, complete work, and see how the master lists and options affect ServiceCEO without worrying about corrupting your live data. In short, the Demo Database will help you learn how to configure your own database in order to best serve your unique business.

2. Click **OK**. A warning dialog box may appear.

    Caution:
    If the ServiceCEO CD is not in the computer when you click **OK**, you will receive an error. Please make sure that the ServiceCEO CD is still in your computer before you attempt to load the demo database.
    If you do not have the ServiceCEO CD, click Cancel and download the Demo Database from the Insight Direct member center:
    http://www.insightdirect.com/login.html

3. If necessary, click **Yes**. The database will load. When complete, the last page of the ServiceCEO Database Setup Wizard appears.

4. Click **Finish**. The Setup Wizard will close.

Your application is now ready to run!

Installing ServiceCEO with the full version of SQL Server

If you have a full version of SQL Server™ installed, you can configure ServiceCEO to use it rather then the MSDE. If you are using the MSDE, you can skip this topic. For an explanation of the difference, read the Installing ServiceCEO Overview topic.

Prerequisites:

1. A complete version of any edition of SQL Server 2000, updated to at least Service Pack 3 (SP3) with a collation set to "SQL_Latin1_General_CP1_CI_AS" (For more information on collation, point your browser to: http://msdn.microsoft.com/library/default.asp?url=/library/en-us/instsql/in_collation_19ym.asp. You can also search for "Authentication to SQL Server and Windows" from Microsoft's website.)

2. Experience using SQL Server management tools, especially Enterprise Manager.

To install a ServiceCEO database that will work with SQL Server 2000, please follow the following steps.

1. Run ServiceCEO.exe. This file is located on the ServiceCEO Installation CD. The ServiceCEO InstallShield Wizard appears to walk you through the process. The steps for this process are located in the Installing ServiceCEO with MSDE topic.

2. On the Select Components page of the InstallShield Wizard, do NOT select the **Local Database Engine** check box.

3. When the installation is complete, reboot your computer as prompted.

4. Using Enterprise Manager, create a new database on the computer. Name the database "ServiceCEO" (This is the internal name of ServiceCEO).

5. Create a new user on your server. ServiceCEO is designed to log into the server using SQL Authentication, not Windows Authentication. You may need to configure your server to allow this type of authentication:

   o Name the user "insight"
   o Set the user's default database to "ServiceCEO". ServiceCEO will use this account to access the database.

6. Configure the "insight" user so that the user has the proper security permissions for accessing the "ServiceCEO" database.

7. Load a database. Backups created by the ServiceCEO backup/restore utility end in an SCB extension. A SCB file is a regular SQL Server backup that is zipped with the password "dunkies" (inspired by someone's choice of caffeine for the day). You can use WinZip or another compression utility to extract the raw SQL backup and restore it into your "ServiceCEO" database using Enterprise Manager.

Tip:
If you do not have a file compression tool, please download WinRAR from the Support Utilities section of http://www.insightdirect.com/support.html.

8. If you want to load a blank database onto your server, you may download a backup of the blank database from: http://ws2.insightdirect.com/download/blank.SCB. Your ServiceCEO CD may also contain other SCB files with demo data, if you would prefer to load those.

9. Download this file: http://ws2.insightdirect.com/download/setpassword.zip

10. Extract the setpassword.zip file to the desktop of the server.

11. Double-click the SetPassword.exe file. The Database Password Setup dialog box appears.

12. Verify that the database name to which you're connecting is "ServiceCEO".

13. When prompted, type your personal "sa" username/password combination.

14. Click **Finish**.

15. Log in to your server as an administrator (sa) using Query Analyzer.

16. Change to the "ServiceCEO" database and run the command "EXEC up_UpdateInsightUser".

17. Test your configuration. Verify that the system DSN named "InsightDirect" points to your server. For detailed instructions, see the Network Configuration Overview section.

You can now run and login to ServiceCEO in the normal manner.
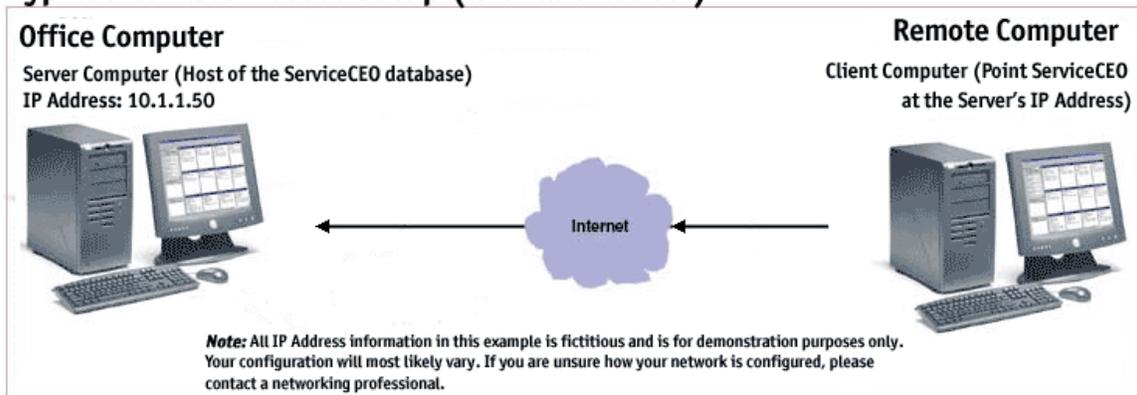
Configuring your Network

Network Configuration Overview

You can connect multiple ServiceCEO users to the same database via a network. There are two different types of networks:

- **Local Network.** A Local Area Network (LAN) consists of computers that are in the same physical location. For example, if you have seven computers in the same office building all working off of the same database, you are running a LAN.

- **External Network.** A Wide Area Network (WAN) consists of multiple computers in separate physical locations connected via the Internet. Examples of WANs include:

  o Connecting to the ServiceCEO database located in your office from a computer at home.
  o An employee based in Boise, Idaho logging onto a ServiceCEO database located in St. Louis.

Typical Remote Access Setup (without Router)

Office Computer
Server Computer (Host of the ServiceCEO database)
IP Address: 10.1.1.50

Remote Computer
Client Computer (Point ServiceCEO at the Server's IP Address)

Internet

Note: All IP Address information in this example is fictitious and is for demonstration purposes only. Your configuration will most likely vary. If you are unsure how your network is configured, please contact a networking professional.

Regardless of the type of network you are running, you need to configure all client computers running ServiceCEO so that they are pointing at the server computer (the computer hosting the ServiceCEO database). To do this, you must connect each user's computer (the "client" computers) to the computer that is hosting the ServiceCEO database (the computer acting as the "server").

Caution:
Please note that there are significant security risks associated with opening your network and/or ServiceCEO database to the Internet. This document does NOT cover setting up security for your server (e.g., file and directory security, server maintenance, etc.). This document assumes you understand the general networking process, and is only meant to help you configure your ServiceCEO network. For a brief overview on some networking issues, point your browser to http://www.cites.uiuc.edu/security/network-overview.html.
If you are unsure of how to proceed, please contact your local network professional. They will be able to ensure that access is properly setup and your systems are not at risk.

Note:
ServiceCEO uses an ODBC connection to communicate with the MSDE server. In most broadband configurations, response time should be roughly the same between: a) Running the ServiceCEO client on a remote workstation, and b) using Microsoft® **Remote Desktop Connection** to connect to a workstation which is on the same LAN as the server.
When large amounts of data are requested ("give me a list of 1000 customers") from the ServiceCEO database, the Remote Desktop Connection (b) is expected to outperform (a), since the client software will have a faster connection to the server to retrieve the data.
When smaller amounts of data are requested ('give me 1 customer record"), running the client remotely (a) is expected to outperform slightly (b), since only the data has to be retrieved, whereas Remote Desktop would have to transmit all of the screen changes as well (the Customer Details window appearing, etc.).
In cases where connectivity is less-than-ideal, the Remote Desktop configuration (b) is often preferable since it is more tolerant of dropped connections/packets than native ODBC (a). For more information, open Remote Desktop Connection by selecting **Start > All Programs > Accessories > Communications > Remote Desktop Connection** and press **F1**.

In order to connect client computers to the ServiceCEO database, you will need to determine either the server's computer name or IP address.

- **Internal Network:** You can use either the server's network name or IP address. To determine the server's computer name, double-click your mouse on the SQL icon ( ) on your system tray (located next to the clock). The SQL Server Service Manager dialog box appears, displaying the name of the database. If you do not want to use the computer name, you can use the server's IP Address.

- **External Network:** If you are connecting to the ServiceCEO database via the internet, you will need to know the server's IP Address.

> ***Tip:***
> If you are running your network through a router, you will need to configure your router to enable remote access to ServiceCEO. For complete details, please read the Router Configuration for Remote Access document, located at http://www.insightdirect.com/docs/router_config/.

To determine the IP Address of a computer:

> ***Tip:***
> If you are connected to the internet, point your browser to http://www.insightdirect.com/support.html - your IP Address will be displayed in the **Connection Information** section located on the left side of the page.

1. Select **Start > Run**. A Run dialog box appears.

2. Type "Command" or "cmd" in the **Open** field.

3. Press **Enter**. A "dos" or command prompt window appears.

4. At the prompt, type "ipconfig". Note that this is short for IP Configuration.

5. Press **Enter**. The computer's configuration information appears.

6. The computer's IP address is on the IP Address line. Please note that the address in the graphic is only an example.

Connecting ServiceCEO to Another Database

In order to connect your client computers to the computer acting as the ServiceCEO server, you must configure the Open Database Connectivity (ODBC) options on every client computer to "point" the client at the ServiceCEO server computer.

Note that server computers will not need to configure ODBC settings since MSDE will automatically configure it for you.

> *Tip:*
> You can view a training video that covers this topic in the Insight Direct Member Center. To view this training video, login to the member center in the usual manner, click the **Watch Pre-Recorded Training Classes** link, and then view the **Connecting Multiple Computers to ServiceCEO (Client/Host)** video.
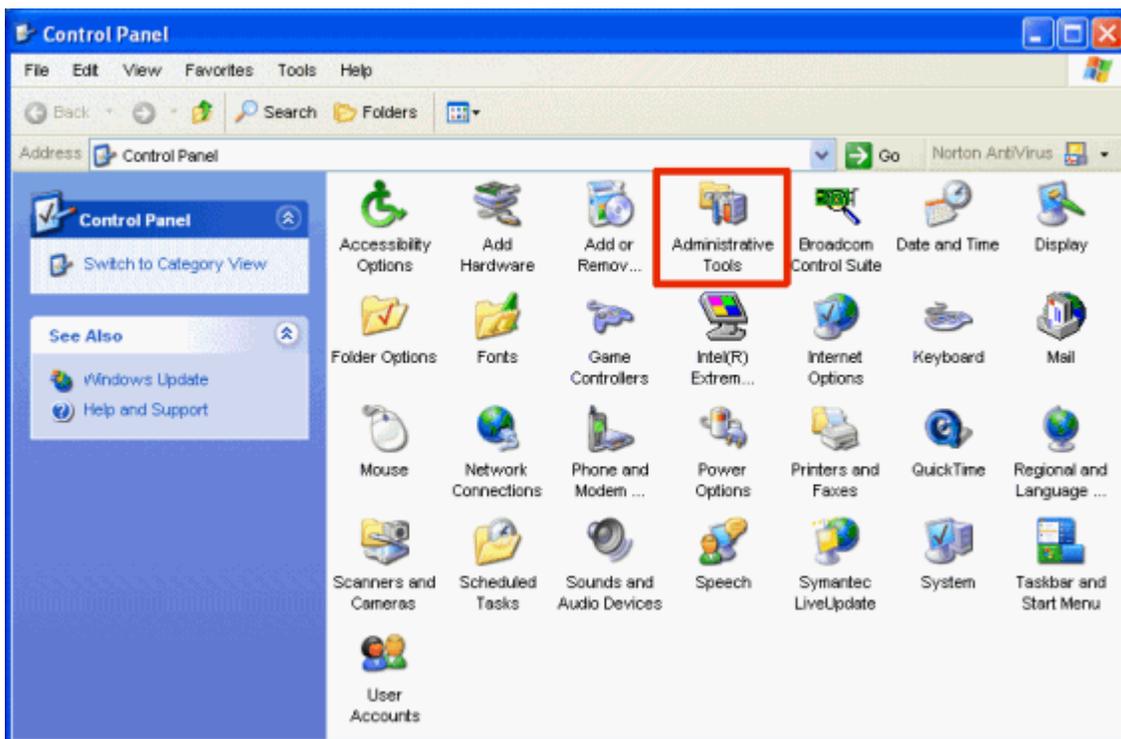
To connect your application to a database on a network:
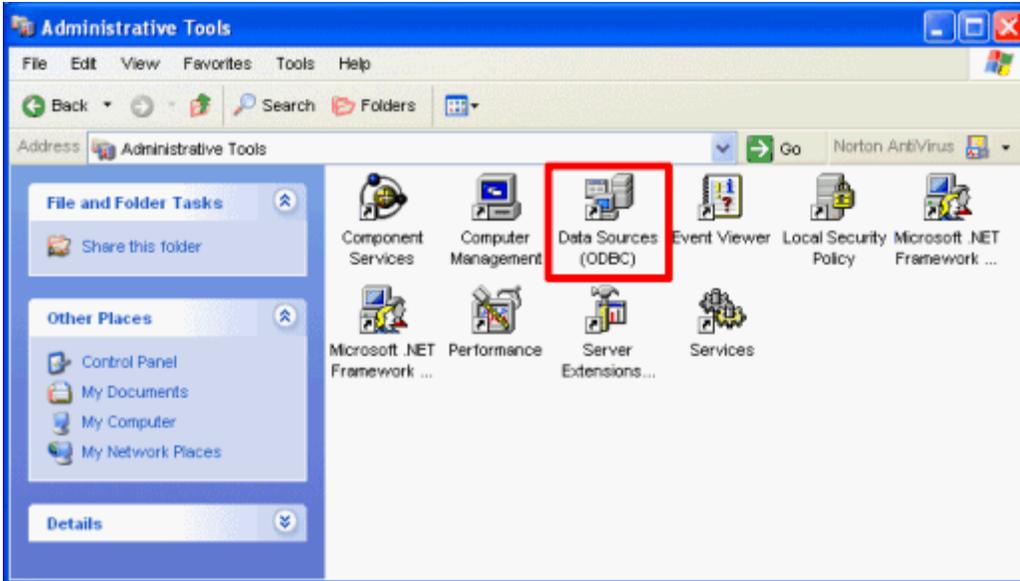
> *Note:*
> These steps are valid for versions of Windows 95 through Windows XP. However, while there may be minor variations between the versions (i.e., icons may be located in a different location), the basic steps are the same.

1. On a client computer, select **Start > Settings > Control Panel**. The Control Panel appears.

2. Double-click the **Administrative Tools** icon. The Administrative Tools window appears.
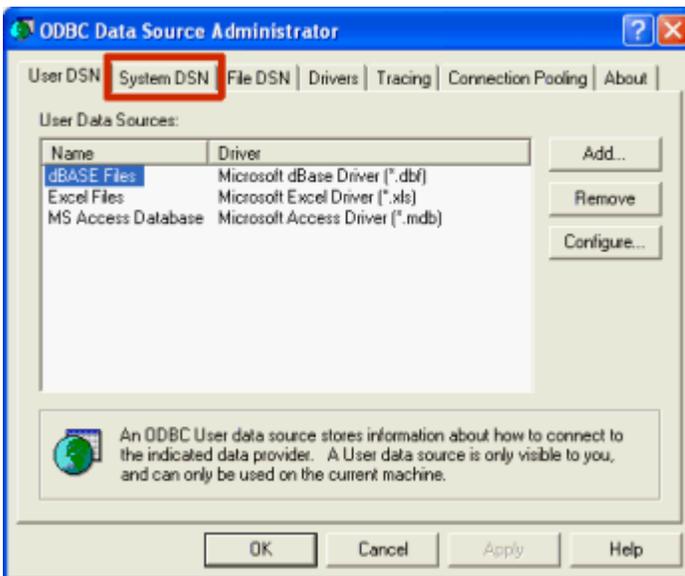
3. Double-click the **Data Sources (ODBC)** icon. The ODBC Data Source
   Administrator dialog box appears.
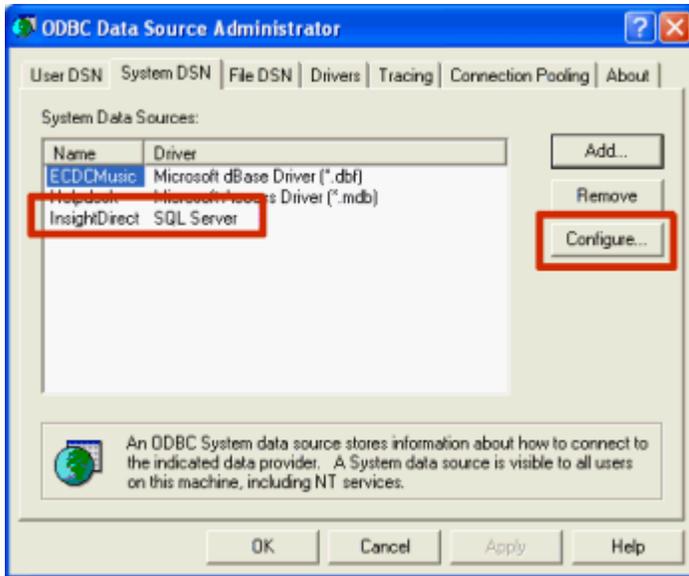
Tip:
In some operating systems, the **Data Sources (ODBC)** icon may be located in
the Control Panel. In addition, in some versions of Windows 98, this icon may be
named "32-bit Data Sources".

4. Click the **System DSN** tab. The System DSN tab of the ODBC Data Source
   Administrator dialog box appears.
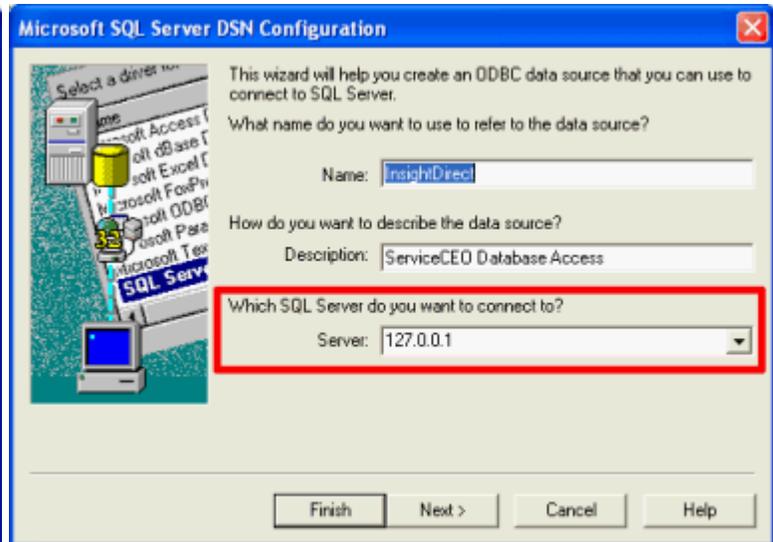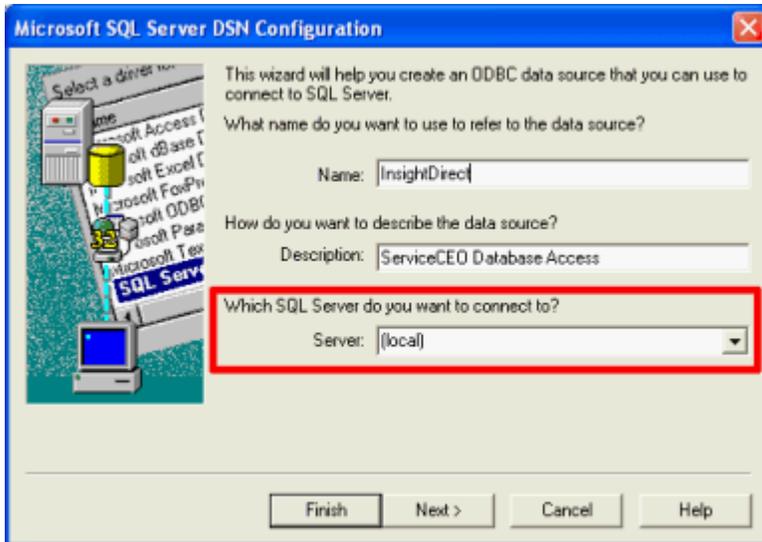
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5. Click the name "InsightDirect". The name will be highlighted.

6. Click **Configure**. The Microsoft SQL Server DSN Configuration dialog box appears.

For local Networked Connections:	For Remote Access via an Internet Connection

7. Select the name of the computer which is hosting the database from the **Which SQL Server do you want to connect to?** drop-down list.
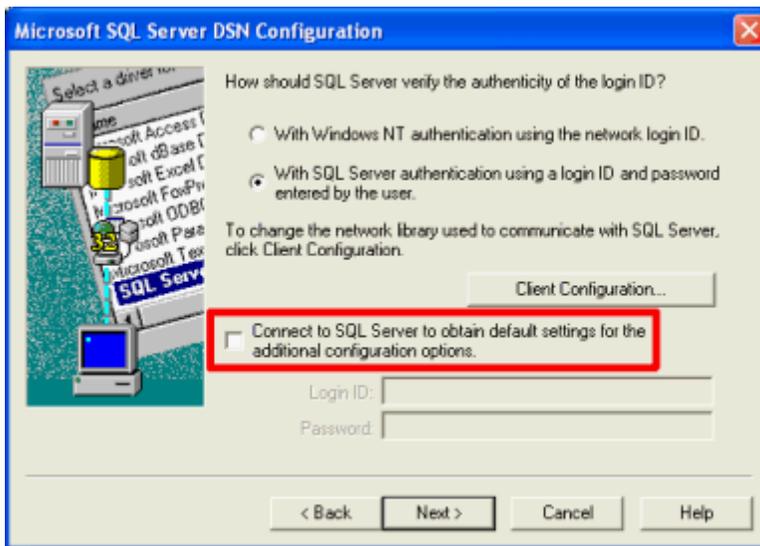
7. Select or type the IP Address of the computer/ server that is hosting your database from the **Which SQL Server do you want to connect to?** drop-down list.

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Tip:
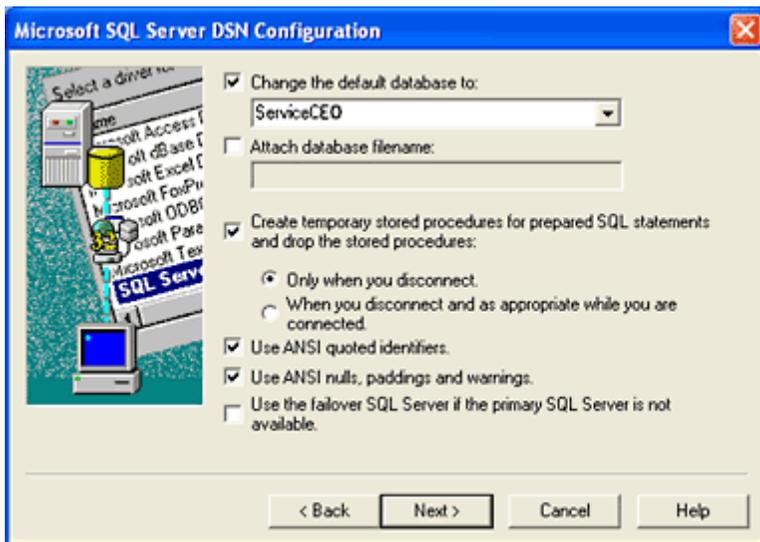
If you do not know the name of the server computer, simply double-click your mouse on the SQL icon (🔃) on the system tray (located next to the clock) on the computer hosting the database. The SQL Server Service Manager dialog box appears, displaying the name of the database. Type this name into the **Which SQL Server do you want to connect to?** drop-down list.

8. Click **Next**. The second page of the Microsoft SQL Server DSN Configuration dialog box appears.

9. Verify that the **Connect to SQL Server...** check box is deselected.

10. Click **Next**. The third page of the Microsoft SQL Server DSN Configuration dialog box appears.

11. Depending on what version of ServiceCEO you are running (and have run in the past), the Change the default database to: value will be different.

- o If you are running ServiceCEO 5.4 or previous, or have ever run ServiceCEO 5.4, type **ServiceWorks** into this field.

- o If you are running ServiceCEO 5.5 or higher and have never run anything previous to ServiceCEO 5.5, type **ServiceCEO** into this field.
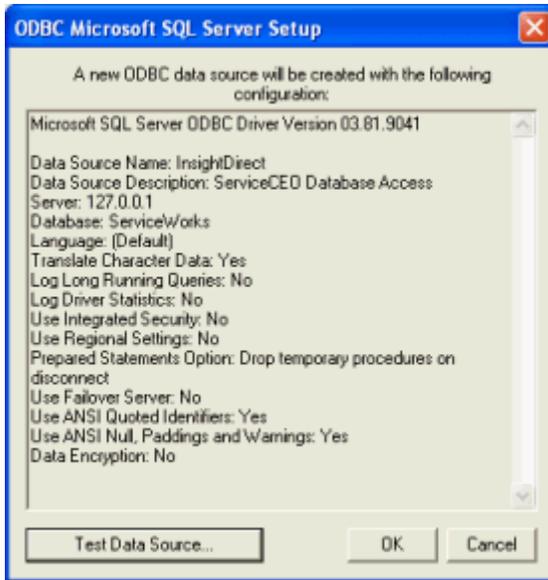
Tip:
If the first database name you tried doesn't work, please try the other database name. For example, if you tried typing ServiceCEO but was not able to connect, try typing **ServiceWorks**.

11. Click **Next**. The fourth page of the Microsoft SQL Server DSN Configuration dialog box appears.

13. Click **Finish**. The ODBC Microsoft SQL Server Setup dialog box appears.

14. Click **OK**.

⚠ **Caution:**
Do not click the **Test Data source...** button.

15. Open ServiceCEO.

If, when opening ServiceCEO, you receive an error message stating "Database Error - Connection could not be established", some of your settings are incorrect. For troubleshooting information, please read the next topic, Troubleshooting a Network Configuration.

Troubleshooting a Network Configuration

If, after following the steps detailed in the Connecting ServiceCEO to Another Database section, you are still unable to connect to the database server, there may be a general networking issue between the two computers. For example, a defective network cable or a firewall may be blocking your access. To help determine what the problem, run the following two tests:

Test #1 - Basic Network Connectivity (the "ping" test)

1. Select **Start > Run**. A Run dialog box appears.

2. Type **cmd** or command in the Open field.

3. Click **OK**. A DOS window appears.

4. Type **ping SERVER** at the command prompt, replacing "SERVER" with the name or IP address of your server.

5. Press **Enter**.

If you see a series of "Reply from..." messages, this indicates that network traffic is successfully moving between your client and your server. This test has succeeded and you can continue to test #2.

If you receive a "Could not find host" message, you may have entered a server name which is not recognized on the local computer. Repeat test 1's step 4 but replace the server's computer name with its IP address. If pinging the IP address succeeds, change your DSN to use the IP address (step 7 in the Connecting ServiceCEO to Another Database section).

Test #2 - Advanced Network Connectivity (the "telnet" test)

1. Select **Start > Run**. A Run dialog box appears.

2. Type **cmd** or command in the Open field.

3. Click **OK**. A DOS window appears.

4. Type **telnet SERVER 1433** at the command prompt, replacing "SERVER" with the name or IP address of your server.

5. Press **Enter**.

If your DOS window goes blank and the cursor resets to the top left corner, this test has succeeded and you can close the DOS window by clicking the X in the top right corner. Your server appears to be running and no network obstructions are preventing your client from connecting. If you continue to experience connection issues when using ServiceCEO, please contact Technical Support.

If you see either a Could not open connection to the host message or a Connection failed message, something preventing the client from connecting to the server port on the server. To fix this, verify that SQL is running and that the server can see itself.
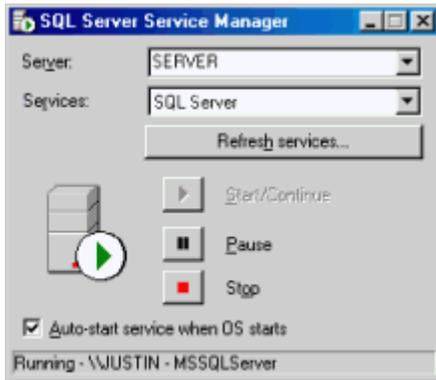
Verify SQL is Running

To verify if the SQL Engine is running on your server, look in your system tray (generally located in the lower right corner of your computer's task bar, next to the clock). If it is running, you will see the MSDE icon:

If you do not see the SQL engine running in your system tray, please follow these steps.

1. Select **Start > Programs > Startup > Service Manager**. The SQL Server icon will appear in your system tray.

If the SQL icon does not have a green triangle, double-click on the SQL icon. This will open the SQL Server Startup Manager window.

Press the green "play" button in this window to start SQL Server.

Note:
If the green "play" button is not active in the SQL Server Startup Manager window, you may need to click **Refresh Services** first.

Can the Server Connect to Itself?

On the Server computer, follow these steps:

1. Select **Start > Run**. A Run dialog box appears.

2. Type **cmd** or command in the Open field.

3. Click **OK**. A DOS window appears.

4. Type **telnet SERVER 1433** at the command prompt, replacing "SERVER" with the name or IP address of your server.

5. Press **Enter**.

If your DOS window goes blank and the cursor resets to the top left corner, this test has succeeded - the server can connect to itself.

Filtering Software

The next troubleshooting step is to verify that nothing is filtering traffic on the server's port 1433. Port 1433 is the default port used by SQL. Since ServiceCEO communicates using the SQL language, all incoming requests for ServiceCEO data will be in the SQL language as well. Thus, if something is filtering the traffic that arrives at port 1433 (i.e., all SQL requests), all incoming ServiceCEO requests will not reach their proper destination.

Software that may be filtering network traffic include:

- Software or hardware firewall software
- Anti-virus applications

If any software product is filtering traffic to port 1433, you should either turn off this software or disable the port 1433 filtering. Unfortunately, since every program is unique, we cannot tell you how to disable the filtering software. We recommend you read your user documentation for the product you suspect is filtering or blocking port 1433.

Once you have disabled any filtering software, please run the tests above to verify your connection is working.

Internet Provider

Your internet provider, for any number of reasons, may block port 1433. If this is the case, the connection will not work. You will need to contact your internet provider to determine if this is the case and, if so, provide a solution for you.

Windows XP Firewall

If your server or client computer is running Windows® XP®, you will need to either disable the Windows Firewall or provide an exception for port 1433.

> *Caution:*
> Please note that there are significant security risks associated with opening your network and/or ServiceCEO database to the Internet. This document does NOT cover setting up security for your server (e.g., file and directory security, server maintenance, etc.). If you are unsure of how to proceed, please contact your local network professional. They will be able to ensure that access is properly setup and your systems are not at risk.

1. Open Windows Explorer. A shortcut is to right-click the Start menu and select **Explore** from the pop-up menu.

2. Right-click **My Network Places** and select **Properties** from the pop-up menu. The Network Connections dialog box appears.

3. Right-click **Local Area Connection** and select **Properties** from the pop-up menu. The Local Area Connection Properties dialog box appears.

4. Click the **Advanced** tab. For more information on disabling the Windows Firewall or creating an exception for port 1433, please see your Windows documentation.

Still Can't Connect?

If you continue to experience connection issues contact Insight Direct's Technical Support Department. Be sure to tell the results of both the ping test and the telnet test to the Technical Support Representative.

Managing your Database

Toggling Between Databases

To switch between two databases, you need to perform the following two steps:

- Backup the current database

- Restore another database

Caution:
Restoring a database automatically overwrites the current database. Make sure that you have backed up your current database before you restore another database, or your will lose your current data.

An example of when you might want to switch between two databases is during database configuration. We recommend that you use the demo database to test out configuration options for your business before you toggle back to your live database for your actual configuration.

Caution:
Make sure that all users have exited ServiceCEO before you do perform any database management activities.

Installing a New Database
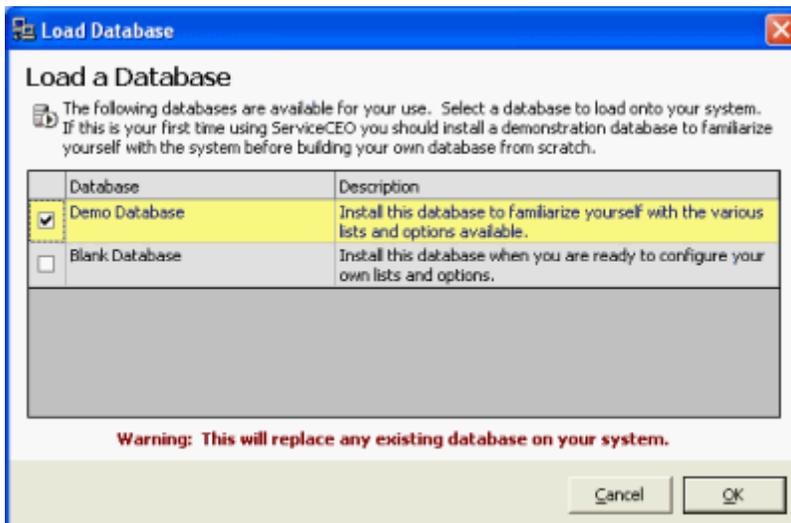
To install a new, blank database:

1. Select **Start > Programs > ServiceCEO > Local Database Engine Configuration**. The ServiceCEO Database Setup Wizard appears. As it configures your database, you will see a progress page.

After several processes have run, the Load Database dialog box appears.
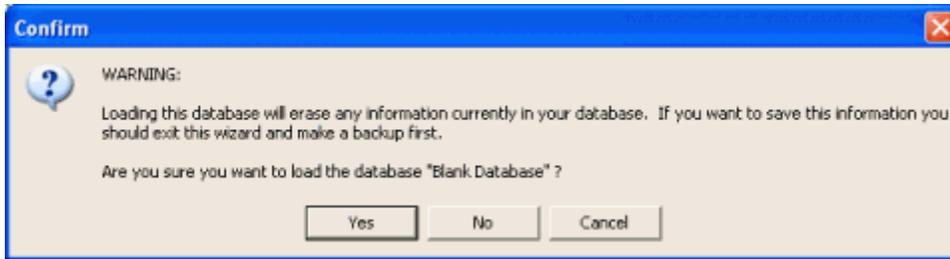
2. Select the **Blank Database** check box.

   Tip:
   If you are new to ServiceCEO, we highly recommend that you start by loading the Demo database. See the Creating your Database section for more.

3. Click **OK**. A warning dialog box appears.

Caution:
If you have not yet backed up your current database, do so now. See the Backing up the Database section for details. Once you click **Yes** in this dialog box, your current database will be deleted.

4. Click **Yes**. The database will load. When complete, the last page of the ServiceCEO Database Setup Wizard appears.

5. Click the **Launch ServiceCEO on Exit** check box to start ServiceCEO when you exit the Setup Wizard.

6. Click **Finish**. The Setup Wizard will close. The blank database is loaded into ServiceCEO and is ready for configuration! See the Configuration Overview section of the Implementation Manual to start.

Backing up the Database

Since ServiceCEO contains so much valuable data, it is wise to periodically backup the database to protect yourself from data loss in the event of system failure, theft of computer equipment, or other unforeseen accidents. To protect you from any significant data loss, ServiceCEO lets you backup your entire database.

> *Tip:*
> You should regularly backup your database in order to minimize the possibility of losing any data. We also recommend that you keep this backup file for at least six months, just in case you need it.

Backing up a database saves your data in a backup file with a .scb extension. This file type stands for **S**ervice**C**EO **B**ackup. Note that only .scb files can be used as a ServiceCEO database.

> *Caution:*
> We do not recommend that you back up your database directly to an external or removable source (i.e., CD-ROM, Zip file, etc.). Doing so may result in data corruption. If you want to put your database backup files on an external/removable source, back up the database to a location on your local computer (such as your desktop) and, after the backup is complete, copy the backup .scb file to the external/removable source.

> *Caution:*
> Your computer may recognize the ServiceCEO backup file as a **.zip** file, not a .scb file. If this occurs, do not be alarmed - your computer has just confused two different types of file compression. Simply change the extension of the file back to .scb to fix the problem. To rename the file extension, right-click the file, select **Rename** from the pop-up list, and change ".zip" to ".scb".
> Note that this solution will only work if you can see your file extensions. If you cannot see file extensions, you must first instruct your operating system to turn them on. To do this, open Windows Explorer. Select **Tools > Folder Options**. Click the **View** tab. Deselect the **Hide extensions for known file types** check box - it should now have no visible check mark. Click **OK** to display your file extensions.

To back up your database:

1. Verify that all ServiceCEO applications are shut down.

2. On the computer hosting your ServiceCEO database, select **Start > Programs > ServiceCEO > Backup or Restore Database**. The ServiceCEO Local Database Utility dialog box appears.

3. Verify that the **Backup current database** option button is selected.

4. Click **Next**. The second page of the ServiceCEO Local Database Utility dialog box appears.

Tip:
ServiceCEO's default backup location is **C:\Program Files\ServiceCEO\backup**. If you want to change the installation location, click **Browse**. The Browse for Folder dialog box appears. Navigate to and select the folder on your computer where you want to your backup file to be located. Click **OK** to change the location. The new location will appear on the second page of the ServiceCEO Local Database Utility dialog box.

5. Click **Next**. The backup process begins. A status box appears as the ServiceCEO Local Database Utility backups the current database. When completed, the Success dialog box appears.

> *Note:*
> Your backup file will automatically be named with the date on which the backup is being run. For example, if you ran a backup on November 10th, 2003, the backup file would be named 11102003.scb.

6. Click **OK**. The second page of the ServiceCEO Local Database Utility dialog box appears with a success notice.

7. Click **Finish**. The ServiceCEO Local Database Utility dialog box closes. Your database is now backed up.

To learn how to schedule automatic backups, please search for the "Scheduling Automatic ServiceCEO Database Backups" solution in the Insight Direct Member Center.

Restoring a Database

At any point, you can load a saved database into your current application.

To restore a database:

1. Select **Start > Programs > ServiceCEO > Backup or Restore Database**. The ServiceCEO Local Database Utility appears.
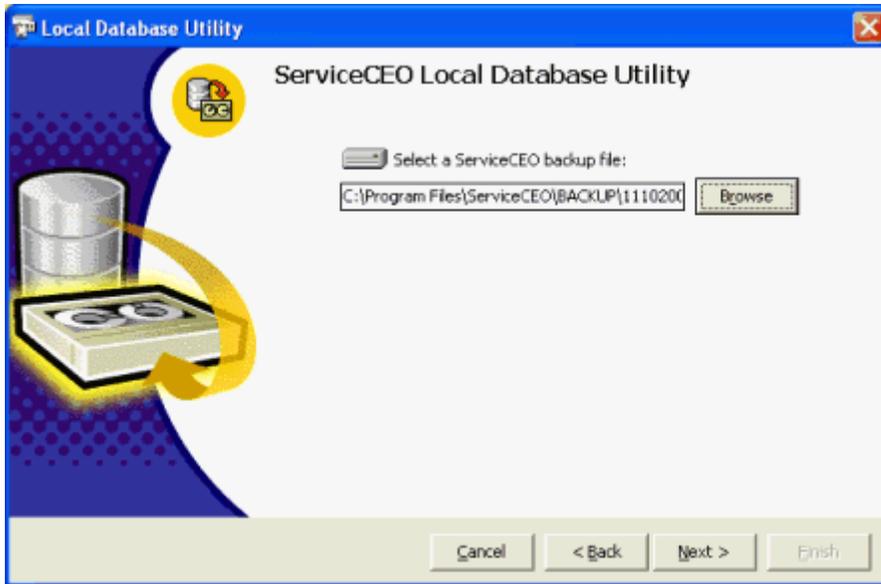
2. Select the **Restore database from backup** option button.

Caution:
Restoring a database will automatically overwrite and erase the current database. Make sure that you have backed up your current database before you continue. See the Backing up the Database section for details.

3. Click **Next**. The second page of the ServiceCEO Local Database Utility appears.

Tip:
By default, ServiceCEO saves its backup files in the C:\Program Files\ServiceCEO\backup\ folder.

4. Click **Browse** to locate the database you want to restore. The Browse for Folder dialog box appears.

Caution:
Only files with a .scb extension can be used as ServiceCEO databases. This file type stands for **S**ervice**CEO B**ackup.

5. Navigate to and select the folder on your computer where the backup file is located.

Note:
ServiceCEO backup file names consist of the date on which the backup is being run. For example, if you ran a backup on November 10th, 2003, the backup file would be named 11102003.scb.

6. Click **OK** to change the location. The new location will appear on the second page of the ServiceCEO Local Database Utility dialog box.

Caution:
Your computer may recognize the ServiceCEO backup file as a **.zip** file, not a .scb file. If this occurs, do not be alarmed - your computer has just confused two different types of file compression. Simply change the extension of the file back to .scb to fix the problem. To rename the file extension, right-click the file, select **Rename** from the pop-up list, and change ".zip" to ".scb".
Note that this solution will only work if you can see your file extensions. If you cannot see file extensions, you must first instruct your operating system to turn them on. To do this, open Windows Explorer. Select **Tools > Folder Options**. Click the **View** tab. Deselect the **Hide extensions for known file types** check box - it should now have no visible check mark. Click **OK** to display your file extensions.

7. Click **Next**. A status box appears as the ServiceCEO Local Database Utility restores the selected database. When completed, the Success dialog box appears.

8. Click **OK**. The second page of the ServiceCEO Local Database Utility dialog box appears with a success notice.

9. Click **Finish**. The database is now restored.

Upgrading ServiceCEO

Upgrading ServiceCEO is an easy process. Basically, you just need to download the installer file, run it, and then reboot your computer. However, note that if you are running ServiceCEO on multiple computers, you will need to run the installer on all computers running ServiceCEO. If you do not, and multiple users attempt to log into ServiceCEO using different versions of the software, errors will result.

1. Point your browser to the Insight Direct Support page at http://www.insightdirect.com/support.html.

2. Click the orange **Log into Member Center** button. The Member Center Login page appears.

3. Type your e-mail address into the E-mail Address field.

4. Type your password address into the Password field.

> ***Tip:***
> If you do not have a password, or have forgotten or misplaced your current password, click **Click Here**. The Forgotten Your Username or Password page appears. Fill in the fields with the appropriate information and click **Send**. Insight Direct will e-mail you a password for the Member Center.

5. Click **Login**. The Welcome to the Insight Direct Member Center page appears.

6. Click the **Download and Install ServiceCEO Upgrades** link. The Upgrade Installer page appears.

You can download either the full or upgrade installer of ServiceCEO.

- Download the ServiceCEO full installer if you need to install it from scratch.
- Download the ServiceCEO upgrade installer if you have already installed ServiceCEO and want to update it to the most recent version.

7. To download the upgrade, click the appropriate **Download File** button. A File Download dialog box appears.

8. Click **Save**. A Save As dialog box appears.

9. Navigate to your desktop and click **Save**. The upgrade file will be downloaded to your desktop.

> ***Tip:***
> Rather then downloading the installer from the Internet for every computer, you may want to save the upgrade installer in a common folder on your internal network. Everyone running ServiceCEO can then copy the installer from the network to their computer for installation.

10. Double-click on the upgrade file. The InstallShield Wizard dialog box appears.

> ⚠️ *Caution:*
> Make sure all users are logged out of ServiceCEO before upgrading. Errors may result if an instance of ServiceCEO is open during the upgrade process.

11. Click **Next**. The License Agreement page appears.

12. Read the entire license agreement by scrolling down.

13. Click the **I accept the terms of the license agreement** option button.

14. Click **Next**. The Choose Destination Location page appears.

15. Verify that the directory path here is **C:\Program Files\ServiceCEO**. If it is not, click **Change**, navigate to C:\Program Files\ServiceCEO, and click **OK**.

> ⚠️ *Caution:*
> If, for whatever reason, you need to run the ServiceCEO installer again or upgrade the program at any point, be sure you select the same directory that you selected on the Choose Destination Location page. If another directory is selected, you will install ServiceCEO into two separate directories, and the program may not run as expected.

16. Click **Next**. The Ready to Install the Program page appears.

17. Click **Install**. The program starts to install. The installation progress displays on the Setup Status page.
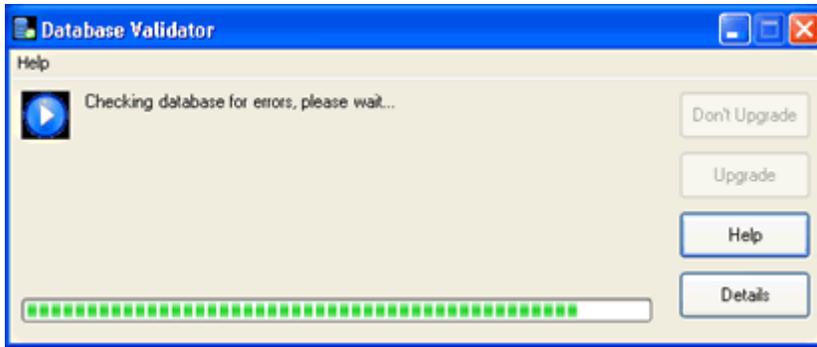
18. When the installation finishes, the Installation Completed page appears.

19. Select the appropriate option button. If you select the **Yes** option button, your computer will automatically reboot after you close the InstallShield Wizard. If you select the **No** option button, you will have to reboot your computer yourself before the application will be installed.

20. Click **Finish**. The InstallShield Wizard will close. Note that you will have to reboot your computer before the upgrade process is completed.

21. Login to ServiceCEO. A dialog box appears, informing you that you need to upgrade your database. If you are running SQL 2000, you will be prompted to enter your SA password.

22. Click **Yes**. The Database Validator appears and automatically starts running. The Database Validator is a tool that runs a number of tests on your database BEFORE it is upgraded to ensure that there is no data corruption before the upgrade occurs.

Note:
The Database Validator will not run if you are not running .NET 1.1. If you are not currently running .NET, you can download the installer from Microsoft. See http://www.insightdirect.com/dotnet/ for details.

23. When complete, one of several actions will be performed, depending on the number and severity of errors that the Database Validator finds:

   o **No Errors.** The Database Validator automatically closes and the database upgrade begins.

   o **Minor Errors.** The Database Validator displays a yellow caution sign and informs you that some minor errors were found in your database. While you can upgrade the database with these errors without any major problems, we recommend you contact Technical Support to resolve these issues at your earliest convenience. Click **Upgrade** to start upgrading your database.

   o **Critical Errors.** The Database Validator displays a red warning sign and informs you that some critical errors were found in your database. We highly recommend that you stop the upgrade process by clicking **Don't Upgrade**, and contact Technical Support to resolve these issues before upgrading your database.

- Other steps you can perform in the Database Validator are:

   o **Details.** This button expands the Database Validator screen so that you can see the individual test that failed.

   o **Help.** This button displays the Database Validator help, where you can read an explanation of the Database Validator tests and what they mean to your data.

24. If the Database Validator finds no errors, or if you click **Upgrade**, your database will be upgraded to the new version of ServiceCEO. For some upgrades, this may take some time. Although it may look like ServiceCEO is unresponsive, the truth is that database scripts are running in the background designed to make your database compatible with the new version of ServiceCEO. Please be patient while the upgrade process runs.

Note:

If any users are logged into ServiceCEO when the database upgrade begins, the Show Connected Users dialog box appears. Since no users can be logged into the program when the database is being upgraded, select every user and click **Disconnect**. See the Show Connected Users section of the User's Guide for details.

25. When the database upgrade is completed, the ServiceCEO login page will appear. Log in to the program in the normal manner.

Tip:

To see the version of your software, select **Help > About**. The About ServiceCEO dialog box appears. The version number is displayed on the Client Software Version line.

For a full description of the new features in the upgrade, please read the Release Notes, located at http://www.insightdirect.com/support.html.

Glossary

.NET: "Dot Net" is a Microsoft® operating system platform that is designed to hide the boundaries between applications and the Internet. In other words, .NET will enable you to seamlessly connect to many different computers and services that will exchange and combine objects and data, instead of interacting with an application or a single Web site. Microsoft envisions this new technology as revolutionary, enabling Internet users to integrate fax, e-mail and phone services, centralize data storage and synchronize all of a users computing devices to be automatically updated. They envision that software will be rented as a hosted service over the Internet, users will have access to their information on the Internet from any device, anytime, anywhere. .NET depends on four Internet standards: HTTP, XML, SOAP, and UDDI.

A

Activation Code: The code needed to activate your application.

C

Client Computer: Any computer running ServiceCEO that is not hosting the ServiceCEO database. All client computers must connect, via a network, to the server in order to see the ServiceCEO database.

D

DSN: Short for Data Source Name. A DSN connects to a database through an ODBC driver. The DSN contains database name, directory, database driver, UserID, password, and other information. Once you create a DSN for a particular database, you can use the DSN to retrieve information from that database.

I

IP Address: A numeric identifier given to each computer on a network (such as the Internet) that enables the transfer of data from one computer to another. IP addresses are displayed as four numbers separated by periods; for example, 7.155.23.211 is a valid IP address.

L

LAN: Short for Local Area Network. A computer network that spans a relatively small area. Most LANs connect workstations and personal computers.

M

MSDE: Microsoft® Desktop Engine

O

ODBC: Short for Open DataBase Connectivity. ODBC is a standard database access method developed by Microsoft®. ODBC enables access to any data from any application, regardless of which database management system (DBMS) is handling the data.

Q

QuickBooks: QuickBooks® is a popular accounting software program with which ServiceCEO can integrate, updating QuickBooks' general ledger when financial actions are performed within the application (i.e., jobs are closed, deposits are made, etc).

S

Server Computer: The computer hosting the ServiceCEO database. As opposed to a "client" computer, which is a user computer connecting to the ServiceCEO database on the server computer.

ServiceCEO Enterprise: ServiceCEO Enterprise is an expanded version of ServiceCEO with enhanced functionality designed to help you to manage an organization with multiple locations. The main difference between ServiceCEO and ServiceCEO Enterprise is the company structure - ServiceCEO Enterprise has a hierarchical organization model, starting at the top with the Organization, and then moving down into Regions, Branches, and Zones. Each organization can have an unlimited number of regions or branches.

W

WAN: Short for Wide Area Network. A computer network, typically connected through the Internet, that spans a relatively large geographical area.

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