Setup and Configuration

This course clarifies and demonstrates the process for setup & configuration of D-Tools SI with your company specific information and preferences. Each field is reviewed in depth so that you understand its ramifications throughout the D-Tools process. Best practices, tips and implementation techniques are also covered.

Course Outline

Setup Tips & Considerations

- o Global Settings vs. Project Specific Settings
- o Company Defaults & Other Tips

Control Panel

- o Application
- o User
- o Catalog
- o Project
- o Mobile Quote
- o Schedule
- o Purchase Order
- o Report
- o QuickBooks
- o Server
- o Drawing Add-Ins Manager

Quick Setup

- o Company
- o People
- o Catalog
- o Projects

Notes

Setup Tips & Considerations

Global vs. Project Settings

- o When embarking on your SI setup and configuration, keep in mind that these settings are your "global" settings for your company's use of D-Tools SI.
- o You want to ensure that these settings represent what happens "most of the time", with the knowledge that various settings can be changed on a project specific basis for the "anomalies".
- o One common pitfall encountered is configuring the software based on the small percentage of anomalies rather than the typical project which happens "most of the time".
- o Inside of each project you have the ability to tweak the settings to meet the needs of that specific project.

Your D-Tools Setup Evolution

- o Your settings as configured today are going to change as you become more familiar with D-Tools and as your company evolves into a higher functioning organization. We all have room to improve right?
- o Keep in mind as you go through the setup that it's not going to be "perfect" right out of the gate. Your D-Tools setup will go through an evolution over time. Think of it as being calibrated over a period of time.

Module Specific Preference Settings

- o Located inside the various modules of SI are user preference settings, which are different from many of the truly 'global' settings we are covering in this course. Examples are: Report Settings, Project Settings and QuickBooks Settings. These user specific preference settings will be covered in more detail along with that particular module when they are more applicable.

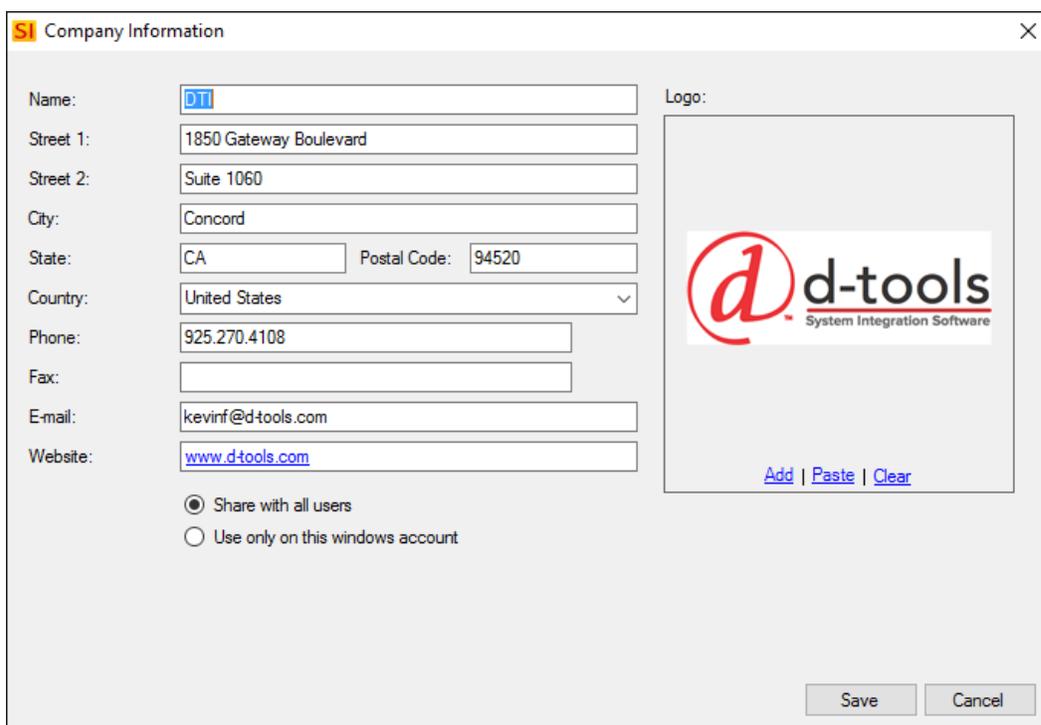# Control Panel (Start→ Setup→Control Panel)

The Control Panel is the main setup interface for the D-Tools SI application. It is a central location for the various application settings you can use to configure your D-Tools program to meet your company's processes. These settings are organized in the Control Panel by their respective area of influence. It should be known that the many of these settings can also be changed from within their respective modules such as projects, catalog and reports from the Settings tab.

Notes

Application

Company Information

- o Address & Contact Information
- o Logo
- o Share with All Users
- o Use Only on this windows account: Allows customization of contact information for each user.

Notes

Application Settings

The Application settings allows you to set global settings for each Client machine.

- o **Application:** Warn me when closing the application window (True/ False): Warns when closing application
- o **Color:** Allows for setting colors for row highlighting and font colors inside the project editor bill of materials for the following types of items:
  - Accessories, Options & Alternates
- o **Resource:** Display Resource Conflicts (True/ False)
- o **Server**
  - **Update Custom Reports from Server:** Choose whether to update reports from server automatically: Never, Automatic or Prompt when an update is available.
  - **Update Stencils & Blocks from Server:** Choose whether to update Visio stencils and AutoCAD blocks from server automatically: Never, Automatic or Prompt when an update is available.

Check For updates

Check for client application installation updates. Always check with your administrator as many Client software updates require a server update to be performed first. Make sure all projects are checked in prior to performing an update.

Register

This utility allows you to register your software with a key. This is typically performed when a trial has been converted into a paid license.

User

My Account

- **Username & Password:** view and edit your login credentials here.
- **Permissions:** View your user permissions assigned by the administrator
- **Server:** View current server logon details
- **Registration:** View your registration details such as qty of licenses, add-ons purchased, etc.

Notes

Users

This is where we create our users who can access D-Tools SI as well as "resources" and "Mobile Installers" who cannot sign into SI. Resources are used in the scheduling module as well as to be assigned to projects in various roles for tracking purposes (utilizing Roles). In addition to managing users, we can manage user groups and roles here as well. User groups control user permissions for users in SI, and roles loosely define resource relationships to a project such as "Sales, Project Management, etc".

Exercise – Add a New User

1. Click 'New'
2. **Name**
3. **Email**
4. **Mobile**
5. **Roles** – Roles identify a specific resource's relationship to the project i.e. Sales, Project Manager, etc. This is most useful where there are multiple resources for a specific position or role.
6. **Cost/ Hr.** – this is used in the Scheduling module to determine estimated/ actual costs per resource.
7. **Can Sign Into System Integrator (True/ False)**
    a. Username
    b. Password
    c. User Group – Permissions are setup by group and assigned to users.
8. **Mobile Installer**
    a. Email: An email will be sent to the mobile installer providing them with access details for your company's mobile installer portal and their username/ temp password.
    b. Role: Select whether the installer is an admin or an installer, this controls their permissions in Mobile Installer.
    c. Mobile Installer Inactive
    d. Link to an existing mobile installer
9. Click Save

Notes

Other User Management Tools:

- o **Email:** Once you have added the new user you can email them their credentials for logging into D-Tools
- o **Disconnect:** If a user's software has crashed, their computer is unavailable or for some other reason they are not logged out, this will force their user to be disconnected from the server and make their license available again.
- o **Quick Filter:** Filter your list of users to find who you are looking for.

IMPLEMENTATION TIP

- o Create a unique user for each of your staff who will be using D-Tools. Avoid creating users like "Engineering" or "Sales" as this can lead to confusion when you are trying to determine who has a file checked out or who created a specific project.
- o Licensing of D-Tools is based on concurrent users logged into the software, not by the # of users you create. You can create as many users as you want, you are only limited to how many can be simultaneously logged in by licensing.

User Groups & Permissions

Users must be assigned to a user group; each group has permissions assigned to it, allowing you to control what a user is capable of doing in SI.

Exercise – Add a New User Group

1. From the Users list Click "User Groups"
2. Click "New"
3. Add/ Remove Permissions as necessary for each permissions category (see below for an overview)

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Let's Review the Available Permissions

Catalog	
Permission	**Function**
Catalog	Grants all Catalog permissions
View Catalog	Grants ability to view the Catalog. Denying this permission negates all permissions below in the list
Create/Modify Products	Grants ability to create or modify existing Products
Create/Modify Labor	Grants ability to create or modify existing Labor Items
Create/Modify Packages	Grants ability to create or modify existing Packages
Delete Products	Grants ability to create or delete Products
Delete Labor	Grants ability to create or delete Labor Items
Delete Packages	Grants ability to create or delete Packages
View Costs	Grants ability to view/edit cost for the catalog items
View Prices	Grants ability to view/edit pricing for the catalog items
Share Product Queries	Grants ability to share Queries that you create
Modify Catalog Settings	Grants ability to modify the Catalog Settings
Manage Manufacturers	Grants ability to modify the Manufacturers list
Manage Categories	Grants ability to modify the Categories list
Manage Phases	Grants ability to modify the Phase settings
Manage Taxes	Grants ability to modify the Tax Settings
Manage Price Types	Grants ability to modify the Price Types

Notes

Projects	
Permission	**Function**
Projects	Grants all Project Permissions
View All Projects	Grants ability to view Projects. Denying this permission negates all permissions below in the list
View My Projects	Grants ability to view ONLY "My Projects"; which are those projects where "My" user is assigned as the Project Owner.
Create/Modify Projects	Grants ability to create or modify existing Projects
Create/Modify Drawings	Grants ability to create or modify existing Project Drawings
Create/Modify Revisions	Grants ability to create or modify existing Project Revisions
Delete Projects	Grants the ability to delete or archive Projects
Delete Drawings	Grants the ability to delete Project Drawings
Archive/ Archive Projects	Grants the ability to use the project archiving features
Delete Revisions	Grants the ability to delete Revisions of Projects
Create Products	Grants the ability to create new products within the project
Create Labor	Grants the ability to create new labor items within the project
View Costs	Grants the ability to see Item cost pricing within a Project
View Prices	Grants the ability to see Item sell pricing within a Project
Create Project Templates	Grants the ability to create Project Templates
Modify Project Settings	Grants the ability to modify Projects Settings
Manage Contract Payments	Grants the ability to modify the contract payment schedule for a project
Manage Price Settings	Grants the ability to modify the price settings for a project
Manage Price Adjustments	Grants the ability to modify the price adjustments for a project
Change Projects Folder	Grants the ability to change the project folder for a project

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Mobile Quotes

Permission	Function
Mobile Quotes	Grants all Mobile Quotes Permissions
Use Mobile Quotes App	Grants ability to use the mobile app
Manage Mobile Devices	Grants ability to manage the devices granted to use the mobile app.
View All Mobile Quotes	Grants ability to view all mobile quotes in system
View My Mobile Quotes	Grants ability to view only "My" mobile quotes
Delete Mobile Quotes	Grants ability to delete mobile quotes
Archive/ Archive Mobile Quotes	Grants ability to utilize archive features for mobile quotes

Reports

Permission	Function
Reports	Grants all Reports Permissions
Run/View Client Report	Grants ability to run reports categorized as Client reports.
Run/View Management Report	Grants ability to run reports categorized as Management reports.
Run/View Reports	Grants ability to run and view all reports
Create/Modify Reports	Grants ability to create and modify Reports vis the Report Designers
Delete Reports	Grants ablility to delete Custom Reports
Publish Reports	Grants ability to share Custom Reports automatically to the Server for other users to access the updated reports.

Clients, Vendors and Contacts

Permission	Function
Clients and Contacts	Grants all Clients and Contacts Permissions
View All Clients	Grants ability to view all existing Clients
View My Clients	Grants ability to view only "My" Clients

Notes

Clients, Vendors and Contacts	
Permission	**Function**
Create/Modify Clients	Grants ability to create and modify existing Clients
Delete Clients	Grants ability to delete existing Clients
View All Contacts	Grants ability to view all existing Contacts
View My Contacts	Grants ability to view only "My" Contacts
Create/Modify Contacts	Grants ability to create and modify existing Contacts
Delete Contacts	Grants ability to delete existing Contacts
View Vendors	Grants ability to view only "My" Vendors
Create/ Modify Vendors	Grants ability to create and modify existing Vendors
Delete Vendors	Grants ability to delete existing Vendors

Schedule	
Permission	**Function**
Schedule	Grants all Scheduling Permissions
View Tasks	Grants permission to view tasks
Create/ Modify Tasks	Grants permission to create/ modify tasks
Delete Tasks	Grants permission to delete tasks
View Service Orders	Grants ability to view existing Service Orders
Create/Modify Service Orders	Grants ability to create and modify existing Service Orders
Delete Service Orders	Grants ability to delete existing Service Orders
Archive/ Archive Service View	Grants ability to utilize archive features for Service Orders
Resource Hours	Grants ability to view the Resource Hours information from the schedule.

Notes

Purchase Order	
Permission	**Function**
View Purchase Orders	Grants ability to view existing Purchase Orders
Create/Modify Purchase Orders	Grants ability to create and modify existing Purchase Orders
Delete Purchase Orders	Grants permission to delete Purchase Orders
Publish Purchase Orders	Grants permission to publish Purchase Orders to Vendor Portal
Receive Purchase Orders	Grants ability to manage Purchase Order Receives

Mobile Install	
Permission	**Function**
Publish Tasks	Grants permission to publish tasks to mobile installer portal.
Publish Service Orders	Grants permission to publish Service Orders to mobile installer portal.

Application	
Permission	**Function**
Application	Grants all Application Permissions
Manage Users	Grants ability to add/edit/delete/sign out Users and Project Resources
Modify Company Information	Grants ability to modify the Company Information settings

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QuickBooks	
Permission	**Function**
QuickBooks	Grants all QuickBooks Permissions
Import/Export Customers	Grants ability to import and export Clients to create Customers in QuickBooks
Import/Export Vendors	Grants ability to import and export Vendors to create Vendors in QuickBooks
Export/Sync Products	Grants ability to export products/labor from SI to create new Items in QuickBooks. Also grants ability to the Sync function to keep the two databases consistent
Export Estimates & Purchase Orders	Grants ability to transfer an project in SI to an Estimate or Purchase Order in QuickBooks

Notes

Roles

Project Resources (Users who aren't able to login) can be assigned/ tagged to Projects, Tasks and Service Orders. (Login users can be assigned as well.) Resources are also assigned to roles, which help to communicate what their involvement on a project is. Resources can be assigned to multiple roles for such things as designers, types of technicians or other staff you would want to assign to a project, task or service order.

Manage Mobile Installers

This tool can be used to buy additional mobile install licenses seats as well as to manage your mobile install users by making them active/ inactive, changing their role between Administrator and Installer, sending them an email with their login details and deleting mobile installers from the system.

Catalog

Manufacturers

- o This is where you can edit the list of Manufacturers in your database. Beware: if you delete a Manufacturer from this list you will also delete all the data!
- o This is mostly used for setting the case settings or spelling globally for your Manufacturer names, as well as a quick and easy way to purposely remove a manufacturer from your database entirely.

Categories

Categories are an essential (required) field in your D-Tools database. The category has wide sweeping influence over the way your data will be utilized within D-Tools in Visio, Proposal creation, database management, etc….

- o **Categories:** This allows you to add, edit and delete your D-Tools categories. Typically it is best for new users to stick with the standard categories. Beware - deleting a Category will delete all products within that category!

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- o **Sub-Categories:** These are used to help more specifically identify products within a category. There are many areas in SI where a uniform use of sub-categories will make database management much more effective such as Product Queries, Searches, Filtering, Mass Update utilities, etc. Here is an example:
    - ▪ Video Sources
        - — Blu-Ray, DVD, etc…
- o **Product Types:** the 4 types of D-Tools data govern the fields and behavior of an item. Database items inherit their properties from the category they are assigned to. More on this in our database course.
    - ▪ Equipment, Speaker, Wire, Labor
- o **Abbreviation:** The abbreviation gives you the ability to use an abbreviated category name in such things as the Component ID or Wire ID structure and is also used as abbreviations on Icon shapes in drawings.

Phases

Phases are used for both labor rates and stages in a project. All items in the database are attributed to a phase and thus a labor rate from that phase's settings. Phases consist of a base labor rate as well as additional labor "factors" of Miscellaneous, Management and Design Labor. Phases are very useful for filtering items in reports as well as identifying <u>when</u> a group of items ought to be installed, ordered, etc.

- • **Phase Names – (default D-Tools Phases)**
    - o Rough-in, Trim, Finish, Programming
- • **Base Labor Rates:** the labor rate billed for all equipment install hours assigned to products in the project.
    - o **Example:** If 1 labor hour is entered for a product in the labor hours catalog field, this is the rate which will be billed for that hour.
- • **Labor Factors:** Labor Factors use an added percentage of the total base install hours to calculate additional labor for the project. Look at the grid on the interface to see the net labor rates for the phase after calculating factors. Company stakeholders should discuss how these factors should be applied based upon your specific company methodology.
    - o **Misc. Labor:** Primarily used for non-billable time associated with the install. Breaks, drive time, etc.
    - o **Management Labor:** This can be used for project management as well as administration costs
    - o **Design Labor:** Engineering/Documentation labor

- • **Ignore Labor Calculations for Phase:** Ignores labor calculations for item labor assignments and assumes the use of labor line items to allocate labor into the project. You might use this option within a

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Project, for example, where you were not charging labor and only want to charge a client for the equipment within a particular Phase.

- **Phase Specific Adjustments:** When you check the Override Project Defaults for this Phase box, these values will override the Global Adjustments for any of the 3 percentage settings under Product Price Adjustments Settings. Using these price adjustment settings on a per Phase basis gives you more control and accuracy than if you charge a percentage globally on all products in a project.
    - **Misc. Parts Adjustment %** - Adds a percentage on top of the Product price for a phase. Typically used for 'installation materials'
    - **Product Adjustment %** - Adds (Or subtracts) a percentage from the Product price for a phase. Typically used for increasing the selling price or applying a phase specific discount.
    - **Labor Adjustment % -** Adds (Or subtracts) a percentage from the Labor price for a phase. Typically used for increasing the selling price or applying a phase specific discount.

Notes

Phase Table Fields Overview

Field	Description
Cost/Hr:	How much labor costs you per hour. It is a good idea to consider the highest cost per hour you may incur. Labor costs impact the profitability analysis of a project and it's usually best to assume worst case scenario. It's useful to use a "loaded" or "burdened" cost per hour which includes things such as benefits, vacation time, taxes, etc…
Price/Hr:	How much you charge per hour of labor.
Margin (%):	The margin between Cost/Hr and Price/Hr
Factor (%):	The percentage of each Base Labor hour you are charging the client. This number is always 100% for the Base Labor but you will most likely vary the Misc., Mgt., and Design percentages. This will affect the number of hours used in calculations. For example a Design Labor factor of 25% would mean that you would include .25 hrs (15 minutes) of Design Labor for each 1.0 hour of Base Labor (Install Labor).
Difficulty (%)	This field is a multiplier for hours and it affects the Base and Misc. hours only. This number should be set to 100% by default but can be changed on a per project basis if you wish to increase the number of hours charged for Base and Misc. Labor. For example, if you change this number to 200% for the Rough-In Phase within a project, all products assigned to the Rough-In Phase would will double the existing hours. NOTE: Your default setting should always be at 100% and this multiplier should be used for projects that are outside the "norm".
Time Multiplier (%)	These numbers show the details of what is being multiplied.
Factored Cost/Hr:	Displays your Cost/Hr based on the number you enter for the Factor (%)
Factored Price/Hr:	This is your Price/Hr based on the number you enter for the Factor (%). At the bottom right corner you will see the net amount per hour you will charge the customer for every 1.0 hours of base labor added to the project after all of the factors have been accounted for as a result of that hour.

Notes

Implementation Tip

Ramifications of DELETING a phase

- Deleting a phase will cause all data assigned to that phase to become unassigned.

- These items will need to be manually reassigned or reassigned using the Mass Update utility.

- If you have deleted more than one phase, this may prove difficult as you can't "select all" and re-assign.

- All data downloaded from D-Tools is assigned to one of these core phases, deleting one of them will cause that data to come without a phase assignment when downloaded from D-Tools.

Ramifications of RENAMING a phase

- Editing one of the core phase names will negatively impact your data downloads from D-Tools. When you download an item from D-Tools it is looking for a matching phase name. If that phase name doesn't exist, the item will have a phase = "Unassigned". When an item has no phase, it will not charge labor when added to a project, thus it's essential that every item have a phase assigned. If you must rename a phase, just understand you'll need to assign phases after downloading from D-Tools.

I/O's

This allows you to edit the list of default I/O information available in the drop down lists. This setup table provides you the ability to identify your company standards for IO definitions. Every input or output terminal for a D-Tools product consists of 3 elements: Terminal, Signal and Label. These are leveraged into the product specifications and ultimately used in Schematic Drawings.

Head Ends

- When adding bulk wire to projects that is used as a "homerun" cable D-Tools provides the ability to assign a Head End designation for that wire to be run back to.
- The Head End designation is used predominantly for Rough-In or Prewire cabling.
- When running Wire Checklist reports for the Rough-In phase of a project, the report will give a "From" Location (the Location assignment of the wire in the project), and a "To" Location, which is the Head End.
- Head End assignments can also help to group wires together based on their purpose such as: Theater HE, Distribution Panel HE, Voice HE, Video HE, etc…

Notes

Tax Settings

There are 2 different ways of managing taxes in D-Tools:

- Assigning the same rates for all items in a project (those marked as taxable) – Labor and Equipment can have separate rates. This is the most common setting. The rate you select here for Products & Labor will serve as the default for new projects, although you'll be able to change it on each project.

- Assigning a different rate for each product/ labor item in a project. This is typically used by more complex tax codes requiring different rates for different types of items.

- Tax in D-Tools is always calculated based on the selling price.

Manage Taxes

- Once you have chosen which of these 2 choices you will use you can then setup your specific tax rates that are available for use. The **Manage Taxes** link allows you to build and name various tax rates that are available for use on your projects. These can represent different city, county or other types of taxes you might need to use.

- **Tax Groups:** A Tax Group allows you to bundle multiple taxes together. Once your rates are setup you can select your default rates for Products and Labor (if using option #1)

Wire Settings (Default Wire Length)

The default wire length is used for determining the typical length of a bulk cable run. Each D-Tools project can have a unique "default wire length" used to specify the length of bulk wire runs. Each bulk wire in a project can automatically use this length, or be set to use a different length manually for each "bulk wire".

Implementation Tip

o Think in terms of your most common or typical project. What is the "average" length of wire run from a room back to the Head End?
o You want your default wire length to represent what's happening "most of the time", knowing that on projects that don't meet the typical standards, the default wire length can be changed. You want your D-Tools setup to limit the amount of changes you have to make on each project you create.

Notes

Product Price Types

D-Tools SI has up to 12 unique price types that you can use to manage pricing in your database. Each one of them can be renamed here. For example if you have commercial and government clients you could have different price levels identified to manage the unique pricing for each type of client.

Implementation Tip

Only use price types if you clearly have distinct price rules for different types of projects/ customers. For example if you regularly price jobs at specific margin levels that would make sense to have a price type to meet those needs because you are regularly using those prices. Don't use a price type if your motive is to offer "discounted" pricing every once in a while. There are easier and more effective methods of doing this on a project by project basis.

Product & Labor Custom Fields

D-Tools has (14) custom properties that can be used to track additional data for your product and labor items. By editing the field names here, the custom fields will be referred to by that name in the catalog to help guide the data entry for those fields. The custom fields have designated data types and when you select a field it's important to select the proper type of field based on the type of information you want to have entered.

- Custom Fields 1-5 = Text Fields
- Custom Fields 6-8 = Numeric Fields
- Custom Fields 9-11 = Date Fields
- Custom Fields 12-14 = Long Text Fields

Implementation Tip

o Consider using custom properties sparingly at the start of your implementation unless you have a very specific field you need to track in order to mimic your existing processes. Don't feel like you have to identify these right up front, it's usually best to implement the software and learn as much as you can about the core capabilities before creating custom fields and work-arounds.

o Custom Field Example:
  - "Verified By": This field is used to place the initials of the user who has verified a particular database product as being accurate. Very useful for verifying engineering level data during the process of creating drawings. The next user knows that someone has already verified the data as accurate.

Notes

Projects

Project Settings

Project Settings give you the ability to set user preferences for various aspects of working with projects. You have access to change these settings from the Control Panel, but also inside the Manage Projects area and from inside the project editor as well. You will likely find that your preferences today may change when you are using the software more regularly. Typical user settings have been defaulted by D-Tools.

Automatic Save	
Setting	**Description**
Automatically Save project	True/ False setting to turn auto-save on or off.
Minutes Between Saves	Allows you to set the frequency that auto-save executes.

Drawing (Visio & AutoCAD settings)	
Permission	**Description**
Automatically open Project Editor on drawing open	Default value = True. If you do not wish to have the Project Editor open automatically, set this to False.
Paste Shapes and Blocks	When copying send pasting a shape or block, you can select what behavior you want to be the default action. • New: Prompted with Add dialog box • Clone: Clones copied item with no prompt • Alternate: item is pasted as an alternate shape for copied item. No new item is added.
Use company logo in title blocks on Visio drawings	Auto insert your company logo into Visio title blocks with 3 behavior choices: • Never: will not auto insert the logo • New: Only inserts on new drawings • Always: Will insert into any drawing you've created.
Save shape (or) block as default when dropped from shape/block tree	Default value = True. Automatically sets the selected shape as your default for whatever product you choose.

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Drawing (Visio & AutoCAD settings)

Permission	Description
Display schematic shapes top to bottom in drawings	Default value = True. This will display your I/Os for schematic shapes/blocks exactly as entered for each product. If you wish to invert them, set this to False.
Store Wire Terminals on Connection	Records wire terminals automatically when making connections in AutoCAD or Visio
Add accessory shape automatically when parent shape is added	When a parent shape is added to drawing page this controls whether accessories will also be added automatically.
Display line end images in Visio for start and end terminal on wire shapes	Controls whether the "connector images" are used at the start and end of wires in Visio.
Prompt to assign category when D-Tools shape/ block is dropped from shape/ block tree	Prompts user with a dialog box suggesting to assign a default category for the shape or block added.
Warn me when adding Optional or Alternate shapes to a drawing	True/ False setting for this warning to help avoid using optional/ alternate shapes in a drawing by accident.
Automatically drop connected products when a product shape is added to Visio	If a wire is connected to a product on one drawing page and the connected device is added to a different page, the wire will also come along.
Use Subcategory as layer name for wire shapes in Visio	This allows the subcategory to be used for wires to allow for more finite control of layers automatically.

Project Editor

Setting	Description
Update catalog when project item editor closed	Default Value = Never. Here you can also choose from Prompt or Automatically. Prompt will open the Update to Catalog form, which is the safest option after Never. Never requires a manual update using the 'Update to Catalog' feature.
Update I/O's to catalog when I/O studio is closed	Same 3 choices as above.
Prompt for alternates when adding products	True/ False choice for whether you want to be prompted for catalog managed alternate items.

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Project Editor	
Setting	**Description**
Prompt for wire length when adding bulk wire	Default Value = True. When a Wire product that is marked as "Bulk Wire" is added to a project, this setting will open a dialog asking for the Wire Length and Head End. Your Default Wire Length from your "Wire Measurements" setting will be auto-populated on the form.
Prompt for wire length when adding package bulk wire	Default Value = False. This setting allows you to pre-set your wire length in Packages. If you wish to be prompted for wire length for "Bulk Wire" in a package, set this to "True".
Prompt to check in project when project editor is closed	Default Value = False. If you want to be prompted to check-in projects to your SI Server when a project is closed, set this to "True".
Open Scope of Work RTF file in WordPad	Default Value= True. If false, it will open in Word or default word processing application.
Persist layout in items view for each project.	The user's selected layout for a project will persist each time you open that project.
Automatically update item install fields from tasks on project editor open	When utilizing the scheduling module in SI – the install fields (Installed (Yes/No), Install Date and Actual hours can be auto-updated from tasks into the project.

Revision	
Setting	**Description**
Display prompt for read only project when opening revision.	Turn the prompt on/ off per user preference.

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Task	
Setting	**Description**
Prompt to mark items on task as installed when task complete	When a task is marked as completed, you will be prompted (True) to choose whether to mark all of the items as installed with current date as installed date, or you will not be prompted and it will just be updated (false).
Include accessories in task when items are added to task.	Choose whether you want accessories to automatically be added along with parent items.

Wire Auditing	
Setting	**Description**
Prompt on wire connection conflict	Default Value = True. This will alert you when you are attempting to connect a wire to different device than the one it is connected to on another page/drawing in Visio/AutoCAD, or if you are trying to connect to a different I/O than what is already connected.
Store new wire connection in case of conflict	Default Value = True. This setting will automatically store the "new" wire connection when the same wire is connected to multiple devices. Note: This setting only applies if you set your "Prompt on wire connection conflict" setting to "False".
Automatically audit wire connections	Default Value = False. When a schematic page is opened in Visio or AutoCAD, when set to "True", will automatically audit all wire connections and disconnect any conflicts found. This is set to "False" to improve speed when working with drawings. You can always run an audit when you wish via a right-click option in Visio: D-Tools->Wire Option->Audit Wire Connections.

Notes

Projects Folder

This designates the location of your D-Tools SI LOCAL project folder. When projects are checked out to you, they are stored here. It is highly recommended to use the default projects folder and that this folder not be changed to another location. It's also recommended to keep all user local project folder locations consistent

o   The local projects folder must be a local folder on the host computer; it cannot be a network drive or removable storage like an external hard drive.
o   If considering moving the folder and you already have projects created, you will need to use the Move Projects feature from the Manage Projects portal.

Locations

The Locations setup is where you create default entries for Locations that can be used when setting up new projects. The Locations are added in a hierarchical style using a series of Locations & Sub-Locations.   Name defaults are categorized into "Groups": used to organize the different types of location names such as:

o   Areas/ Buildings
o   Floors
o   Rooms

When setting up projects you can use a series of locations and sub-locations to create a project location hierarchy up to 5 levels deep (see example below)
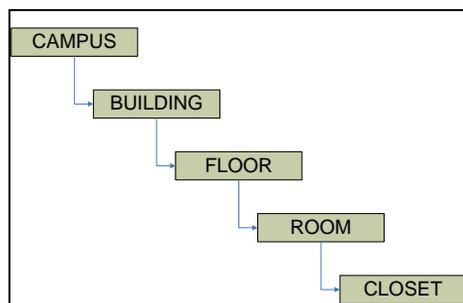
It's typically not recommended (and definitely not required) to have all 5 hierarchy elements used as it creates a fairly complicated setup and reporting scheme; however the capability is there for very large projects. You can have as few as 1 location type in your hierarchy.

Notes

Implementation Tip

When setting up your hierarchy, I prefer to keep it as simple as possible. This provides for ease of project setup as well as for proposal reports that are less complicated. Attempt to remove any layers in the hierarchy that aren't necessary to differentiate from another location in the project. For example, if there is only one floor in the project, do not add a location hierarchy element for floor, it's not useful information.

Locations List

The Locations list helps streamline project setup by providing you with a list of locations to choose from. The goal here is to populate this list with the most common location names so that you aren't typing in common location names on every project. This can be a big time saver. Each location consists of 3 elements:

- **Location Name:** This is the name of each location.
- **Abbreviation:** Enter an abbreviation for each location which can be used as part of a custom Component ID setup (unique number assigned to every item in a project). This can also be configured on a per project basis with the Room number from the CAD plans.
- **Group:** Used to organize the locations in the list for easier selection during project setup.
- **Description:** This is used to give a description for each location (optional). It's typically not used here in the setup as the location description is more of a project specific field.

Notes

Systems

Systems are simply another way of assigning items in a project. They provide you with an excellent way of grouping items in a project not only by their physical location, but also by which sub-system they are a part of. This is an excellent way to filter and group items in your project for reporting, project management, etc… Each system entry consists of two elements:

- o **System Name:** This is the name of each system.
- o **Abbreviation:** Enter an abbreviation for each system which can be used as part of a custom Component ID setup (unique number assigned to every item in a project).
- o **Description:** This is used to give a description for each system (optional). This can be looked at as a system specific scope of work statement, or description of what this system provides. It can be customized on a per project basis.

Implementation Tip

When setting up your systems, consider the naming conventions you have used on your website or on the side of your trucks. You want to be consistent in the way you are marketing and describing the services provided by your company. This provides a consistent messaging from your company to your customers.

Project Progresses

Project progresses define steps in the process of completing the project as it flows through the company. These fields can be very useful when reviewing the projects in your current pipeline by filtering the project explorer list of projects. It's helpful to identify at what point in the process all of your projects are currently at. The Project Progress list can be customized to represent your company's process.

Implementation Tip

There is a delicate balance between having too few and too many steps in your project progress list. Too few and it doesn't provide enough meaning. Too many and the status changes too frequently (and people are likely to forget to change it in the software).

Notes

Order Statuses

The Order Status List allows you to customize the drop down menu for the project specific field for items called "Order Status". Examples are: Not Ordered, Order, and Received, Back Ordered, Long Lead Time, etc.

Contract Payments

This represents the default contract payment schedule that will be used when you open a new project. This payment schedule is used on the D-Tools contract reports to automatically calculate the payment amounts. The contract payment schedule is customizable for each individual project, but this setup establishes the default for all new projects.

- **Payment Name:** This name shows up in payment schedule on contract report
- **Use Fixed Amount:** If you prefer to enter a fixed payment amount for your contract payments, check this box. (Note – all payments must be set to this option, can't be hybrid)
- **Billing Percentage:** Percentage of total project dollars used for payment schedule calculation
- **Fixed Amount:** Amount to be charged to the customer for each payment.

Project Custom Fields

D-Tools has (10) custom properties that can be used to track additional data for your projects. By editing the field names here, the custom fields will be referred to by that name in the project information to help guide the data entry for those fields. The custom fields have designated data types and when you select a field it's important to select the proper type of field based on the type of information you want to have entered.

- Custom Fields 1-8 = Text Fields
- Custom Fields 9-10 = Long Text Fields

Implementation Tip

- o Consider using custom properties sparingly at the start of your implementation unless you have a very specific field you need to track in order to mimic your existing processes.
- o Don't feel like you have to identify these right up front, it's usually best to implement the software and learn as much as you can about the core capabilities before creating custom fields and work arounds.

Notes

Project Number Format

Customizing the project number format can be very useful in having a consistent numbering schema for your projects. Various project fields can be used as well as project custom properties. Each element of your custom numbering format has 3 elements:

- **Format Type**
  - o Field = database field
  - o Text = any text value you want to enter
- **Value:** Database field or text entry
- **Length:** maximum length that can be used in the Project Number for each entry.

Component ID Format

The Component ID is a unique number assigned to every item in a D-Tools project. It helps to uniquely identify each item, including wires. This is where your wire numbering comes from. Component ID formatting have been separated for Wires and Products so that each has its own unique format capability. Customizing the component ID format gives you the ability to select how the ID's are generated. A custom format can be a great thing to communicate valuable project information. Be careful to keep the length of the ID minimal as long ID's can hinder the performance of project throughputs (wire checklists, labels, etc…) when they are too long!

- **Format Type**
  - o Field = database field
  - o Text = any text value you want to enter
- **Value:** Database field or text entry
- **Length:** maximum length that can be used in the Component ID
- **Separator:** Allows you to choose what symbol is used between each element of the ID string. Hyphen, Colon, Backslash or Period.
- **Number of Digits:** Allows user to input how many digits to use on the number portion of the ID's
- **Start Number:** Dictate which number to start with for the numbering.

Notes

Price Settings

Price Settings gives you the ability to choose which of your 'Price Types' will be used as the default price type when setting up a new project. The default for each project can always be changed; this just establishes which is used as the default.

Price Adjustments (Global)

Product Price Adjustments give the user the ability to mark up (or down) the price of products & labor in the project. The price adjustments can be made more specific if configured at the phase level as covered earlier in the course. Note: These are global factors and will be used as the default setting for every new project. There are three types of price adjustments available:

- **Misc. Parts Adjustment %** - Adds a percentage on top of the Product price for a phase. Typically used for 'installation materials'
- **Product Adjustment %** - Adds (Or subtracts) a percentage from the Product price for a phase. Typically used for increasing the selling price or applying a phase specific discount.
- **Labor Adjustment % -** Adds (Or subtracts) a percentage from the Labor price for a phase. Typically used for increasing the selling price or applying a phase specific discount.

These are globally applied factors unless a phase specific override has been applied in phase settings.

Notes

Mobile Quote

Mobile Quote Settings

This provides the admin the ability to setup various Mobile Quote behaviors for your users including.

- **Price**
    - **Price Type:** Select your labor price type to be the default for mobile quote prices.
    - **Labor Price/ Hr.:** Type a labor price per hour or select from the settings
    - **Tax:** Choose a default tax to be applied against the mobile quote budgets. Doesn't distinguish between product and labor taxes on the mobile quote.

- **Payment**
    - Show Deposit (True/ False): This allows you to show a deposit being due after confirming the details of the mobile quote with the client. You may also set the deposit percent here.
    - Use Contingency (True/ False): This allows for a contingency range ie: plus or minus xx% - as the mobile quote is really designed to come up with a "budget" for the project to get the client's acceptance to move forward with the complete detailed and specific system design, this contingency provides a buffer for a "budget range" based on a percentage.
- **Permissions:** choose whether to allow users to adjust their settings or not.
- **Presentation:** Upload a PowerPoint presentation which can be presented from the app.

Schedule

Schedule Progresses

Customize the Schedule progress list here. These progresses allow you to identify the "stage" at which a particular task or service order is currently at. For those managing many service orders, customizing this list may prove very helpful to manage the status of all the service department's activities. The default progresses are: Not Started, In Progress & Completed. A useful addition is "Scheduled".

Notes

Purchase Orders

Number Settings

Number Settings give you the ability to set user preferences for the generation of purchase order numbers. SI can automatically generate PO numbers with a predefined prefix and starting at a specific number. You can also choose to enter a PO number manually when created.

Shipment Preferences

Shipment Preferences give you the ability to maintain a simple list of shipping methods such as "UPS Ground", "FedEx", or "Freight" and choose one of these options when creating a purchase order.

Reports

Report Settings

Report Settings give you the ability to set user preferences for various aspects of working with reports. You have access to change these settings from the Control Panel, but also inside the Manage Reports area and from inside the project editor as well. You will likely find that your preferences today may change when you are using the software more regularly. Typical user settings have been defaulted by D-Tools.

The Report Settings are reviewed in their entirety during the Reporting course.

QuickBooks - QuickBooks Settings

QuickBooks Settings give you the ability to set user preferences and configure the QuickBooks integration to function with your company file. You have access to change these settings from the Control Panel, but also inside the Project Editor. The details, specific process and best practices for these settings are covered in the D-Tools & QuickBooks course. QuickBooks Desktop and QuickBooks Online are supported.

Server - Server Manager

The Server Manager gives you the ability to backup and restore your D-Tools server and files. You must login to the SI Server Manager with a user assigned to the Administrators group to use these functions. If you want

Notes

custom Reports to be backed up in this archive, you must Export your custom Reports to the SI Server prior to running the backup. You can do this in the Standard Report Designer via the "Publish and Export to Server" feature, or you can do this via the Export button in the Report Explorer. (Covered in the Reporting courses)

Backup

- o **In** the SI Server Manager, click the [Backup SI Server] button.
- o You **will** be prompted to confirm that all users have checked-in their Projects and are not currently working in the SI Client. Confirm and click [Continue]
- o On the next form, browse to your backup location to be created and click [Backup SI Server]
- o Scheduled Automated Backups is covered here: http://support.d-tools.com/010_SI_2016/Administrator_Guide/06_Backup_Restore/Scheduling_Backups

Restore

- o In the SI Server Manager, click the [Restore SI 20XX Server] button.
- o You will be prompted to confirm that all users have checked-in their Projects and are not currently working in the SI Clients. Confirm and click [Continue]
- o On the next form, browse to where your backup is located and click [Restore SI 20XX Server]

Cleanup

- o Remove Orphan image files from SI server: removes images which aren't linked to any items.
- o Remove tasks and service orders on your mobile install account which are not part of SI.

Server - Legacy Data Conversion Utility

The Legacy Data Conversion utility converts your Si5 database and settings and transfers them to your SI 2015/16 Server.

1. Select your SI 5 SQL Server Database Name
2. Select the location of your SI 5 Products folder.
3. You have 2 choices on how to deal with duplicate items during the conversion:
    a. Convert the last updated product
    b. Export duplicate products to CSV.

Notes

Quick Setup

The Quick Setup Tool is designed to direct a new user toward critical setup tools that will help them to create their first project more quickly. Advanced and non-critical setup features are not included in the Quick Setup so a new user can focus on those setup features that will impact their use immediately.

Drawing Add-Ins Manager

These tools are used to add the D-Tools drawing add-ins when Visio or AutoCAD has been installed after D-Tools was installed or the add-ins weren't installed correctly during the installation.

Notes