

# Dovico Planning & Timesheet v4

## INSTALLATION GUIDE

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# System Requirements

## Deployment Options

Either installed on your server or use Dovico's hosted application service.

## For all users (Hosted or Installed)

### Computer (End-User) requirements

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

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

## For Installed option only

### Operating systems

Compatible with Microsoft Windows 2003, Vista (Service Pack 1), Windows 7, Windows 8, Windows Server 2008, Windows Server 2008 R2, Windows Server 2012 and Windows Server 2012 R2

### Server Requirements

- .NET 2.0 and .NET 4.0 (included with Dovico for Windows 7 and Windows Vista installations)
- SQL Server 2005, SQL Server 2008, SQL Server 2008 R2 or SQL Server 2012
- 2 GB RAM
- 300 MB free hard drive space on the targeted partition (the destination the software will be installed)
- 250 MB free hard drive space on the operating system's partition

# NEW INSTALLATION

## Important Notes

1. This section of the guide is intended for **those installing** Dovico Planning & Timesheet – a new installation. If you are migrating from an existing version of Dovico Planning & Timesheet, then follow the instructions on page 6.
2. Dovico Planning & Timesheet requires SQL Express 2005, SQL Express 2008, SQL Server 2005, SQL Server 2008, SQL Server 2008 R2 or SQL Server 2012 as the database engine. SQL Express 2005 is included with the software, but you may use your existing SQL Express 2005, SQL Express 2008 or SQL Server installations.
3. During the Installation process, you may be required to reboot your server/computer.

## Preliminary Steps

1. IIS and .NET settings must be set or verified prior to installing the software. If installing on **Windows Vista** or **Windows 7**, these settings will be checked after the installation process.

### For Windows Server 2003

- a.  Launch **Add or Remove Programs**.
- b.  Select **Add/Remove Windows Components** in the left side pane.
- c.  Select **Application Server** in the Components list box and click Details..
- d.  Verify that **Internet Information Services (IIS)** is checked.
- e.  Select **Internet Information Services (IIS)** and click **Details**.
- f.  Verify that both **Internet Information Services** and **World Wide Web Service** are checked.
- g.  Select **World Wide Web Service** and click **Details**.
- h.  Verify that both **Active Server Pages** and **World Wide Web Service** are checked.
- i.  Click **OK**.

### For Windows 8

- a.  Launch **'Turn Windows features on or off'**.
- b.  Check the **.NET Framework 3.5 (includes .NET 2.0 and 3.0)** box.
- c.  Expand the **.NET Framework 4.5 Advances Services** option and check the **ASP.NET 4.5** box.
- d.  Verify that **Internet Information Services** is checked.
- e.  Expand **Internet Information Services**.
- f.  Expand **World Wide Web Services**.
- g.  Expand **Application Development Features**.
- h.  Verify that **ASP.NET 4.5** is checked.
- i.  Click **OK**.

### For Windows Server 2008

- a.  Launch **'Turn Windows features on or off'**.

The **Server Manager** is displayed.

- b.  If **Web Server (IIS)** is enabled, you will see Web Services (IIS) as a major item in the right side pane. If not installed, go directly to step c.  
Scroll down to **Roles Services** and verify that the following are all 'Installed'
- i.  ASP.NET
  - ii.  .NET Extensibility
  - iii.  ISAPI Extensions
  - iv.  ISAPI Filters
- c.  If **Web Server (IIS)** is not installed.
- i.  Select **Add Roles**.  
The **Add Roles Wizard** is displayed.
  - ii.  Select **Server Roles** in the left side pane, and check the **Web Services (IIS)** box.
  - iii.  Click **Next** until you get to **Role Services**.
  - iv.  Expand **Application Development** and verify that **ASP.NET**, **.NET Extensibility**, **ISAPI Extensions** and **ISAPI Filters** boxes are checked.
  - v.  Click **Next** until the Install button is enabled and then click **Install**.

For Windows 2012

- a.  Launch '**Turn Windows features on or off**'.
- Wait for the '**Add Roles and Features Wizard**' to appear.
- b.  Click **Next** until you get to the **Server Roles page**.
  - c.  Enable **Web Server (IIS) (Installed)**.
  - d.  Expand **Web Server (Installed)**.
  - e.  Expand **Application Development (Installed)**.
  - f.  Verify that **ASP.NET 4.5 (Installed)** is checked. You may be notified that dependent items were automatically checked.
  - g.  Click **Next** to get to the **Features page**.
  - h.  Expand **.NET Framework 3.5 Features** and check the **.NET Framework 3.5 (includes .NET 2.0 and 3.0)** box.
  - i.  Expand **.NET Framework 4.5 Features (Installed)** and check both the **.NET Framework 4.5 Installed** and the **ASP.NET 4.5** boxes.
  - j.  Click **Next** until the Install button is enabled and then click **Install**.
2.  If you are using SQL Server 2005 or higher, Dovico Planning & Timesheet requires **Mixed Authentication** configuration. Windows Only Authentication is not supported.

## Installation steps

1.  On the server/computer where the software will be installed, close all open applications, shut down any non-system critical services and stop all Anti-Virus/Anti-Spyware software. Failing to perform this step may cause installation problems.

2.  Run the installation file (PlanningAndTimesheetV4.exe). The installation file can be downloaded from <http://www.dovico.com/download.aspx>.
3.  If installing on Windows Vista or Windows 7, we may detect that you do not have .NET 4.0 and will install it automatically.
4.  You may be prompted to install a Crystal Reports 2008 Runtime service pack. The Crystal Reports wizard will guide you through these steps and then return to the Dovico installation process.
5. Typical prompt windows and questions are displayed during the Dovico installation. The following (5a - 5c) describes a few prompts and questions that are particular to Dovico Planning & Timesheet.
  - a.  On the Setup Type screen, select **Typical** and click **Next**. The Web Services API option installs additional components, which can be used by developers for custom programming.
  - b.  Configure Application Sharing (Windows Firewall): You may be prompted to open the **HTTP** port on the Windows Firewall. Select **Yes** and click **Next**. If you select No then no other users will be able to access the application.
  - c.  Upgrading from a previous version? Select **No** if prompted about upgrading from a previous version.
6.  On the **Installation Wizard Complete** screen, click **Finish**.
7. After a few moments, the **Installing/Configuring SQL Express** screen is displayed. From this point you have the option to **(A)** install SQL Express 2005 or **(B)** use an existing SQL Server or SQL Express 2005 installation.

**Option A:**

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

**Option B:**

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

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

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

**Notes:**

- ✓ You may be required to reboot your computer at this point.
- ✓ A .NET v4.0 update is available from Microsoft that eliminates issues for those using Internet Explorer 11. <http://support.microsoft.com/kb/2836939>

9. For **Windows Vista** or **Windows 7** installations only:
  - a.  Go to **Control Panel > Administrative Tools > Internet Information Services (IIS) Manager**.
  - b.  Open **ISAPI and CGI Restrictions**.
  - c.  All **ASP.NET v4.0** listings should be set to 'Allowed'. If not, then right click the item and select **Allow**.
10. For **Windows Server 2003** installations only:
  - a.  Launch **Internet Information Service**.
  - b.  Expand the **computer** and select **Web Service Extensions**.
  - c.  Verify that **ASP.NET v4.0** is set to **Allowed**.
11.  Before using Dovico Planning & Timesheet, each user's web browser **popup blocker** should either be disabled or have the site where the software is installed flagged as a safe site.
12.  When the installation is complete, select **Start > All Programs > Dovico Planning & Timesheet > Dovico Planning & Timesheet**.
13.  When you start Dovico Planning & Timesheet for the first time, the software will prompt you to create an **Administrator Account**. Take careful note of the User ID and Password you enter.


**IMPORTANT:** If there are difficulties with the installation, an alternative is to perform a clean/complete uninstall of the software (see page 12) and attempt the installation again.

# UPGRADE – from previous version

## IMPORTANT NOTICE

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

The following highlights the major changes. The full list is available on our website at [http://www.dovico.com/dovico\\_planning/documents/dpt4\\_whatsnew.pdf](http://www.dovico.com/dovico_planning/documents/dpt4_whatsnew.pdf)

- **Reports view**  
A new reporting engine and Reports view replaces the old Report Explorer view.
  - ✓ The old (legacy) Reports Explorer view and any custom reports you have added are still available by clicking the Reports Legacy icon  in the new Reports view's toolbar.
  - ✓ Security for individual reports is now applied in the Report Security view.
  - ✓ The new Reports view will not be automatically available to any user assigned to a **custom Security Group**. Review all your custom security groups and set Read/Write/Delete access to the new Reports view as required.
- **Reports:**
  - ✓ Custom built reports prepared for the legacy reporting view for previous versions of Planning & Timesheet may not work in the new version's legacy reporting view.
- **Planning & Timesheet:**
  - ✓ We added two new reports that can be quickly launched from the Project Planning toolbar. From the Project Scheduling tab, you can get a printout of the Gantt view. You can also print your resource utilization chart from the Resource Utilization tab.
  - ✓ You can now set a fixed Finish task to any task.
- **Project Assignments tab:**
  - ✓ Drag and Drop to create assignments is now available for all supported web browsers (Internet Explorer, Chrome, Firefox and Safari for Mac).

## For the person upgrading the software – Important Notes

- This section of the guide is intended for those upgrading from **Dovico Planning & Timesheet version 2 or 3**. If this is a new installation, then follow the instructions on page 2.
- A new registration key is required. Contact Sales to obtain a new registration key. [sales@dovico.com](mailto:sales@dovico.com)
- During the Installation process, you may be required to reboot your server/computer.
- Some users may experience problems related to cached files in their web browsers. Clearing the browser's temporary cached files normally corrects these problems.



# Upgrading from Dovico Planning & Timesheet version 2 or 3

## Preliminary Steps

1.  Any employees who are using the Offline Timesheet must return to **Online operation**, submit their time and not return to Offline mode until the upgrade is complete.
2.  Any employees who have used the Offline Timesheet, the QuickBooks or Import/Export Links should delete the contents of their 'Dovico Applications' folder (in \Documents or \My Documents) before using the upgraded version.
3.  Have your **new registration key** ready before you begin the upgrade as it will be required immediately after the upgrade is completed.

## Remove Dovico Planning & Timesheet

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

## IIS and .NET

IIS and .NET settings must be set or verified prior to upgrading the software. If upgrading on Windows Vista or Windows 7, these will be checked after the upgrade.

### For Windows Server 2003

- a.  Launch **Add or Remove Programs**.
- b.  Select **Add/Remove Windows Components** in the left side pane.
- c.  Select **Application Server** in the Components list box and click Details..
- d.  Verify that **Internet Information Services (IIS)** is checked.
- e.  Select **Internet Information Services (IIS)** and click **Details**.
- f.  Verify that both **Internet Information Services** and **World Wide Web Service** are checked.
- g.  Select **World Wide Web Service** and click **Details**.
- h.  Verify that both **Active Server Pages** and **World Wide Web Service** are checked.
- i.  Click **OK**.

### For Windows 8

- a.  Launch 'Turn Windows features on or off'.
- b.  Check the **.NET Framework 3.5 (includes .NET 2.0 and 3.0)** box.
- c.  Expand the **.NET Framework 4.5 Advances Services** option and check the **ASP.NET 4.5** box.
- d.  Verify that **Internet Information Services** is checked.
- e.  Expand **Internet Information Services**.
- f.  Expand **World Wide Web Services**.

- g.  Expand **Application Development Features**.
- h.  Verify that **ASP.NET 4.5** is checked.
- i.  Click **OK**.

For Windows Server 2008

- a.  Launch '**Turn Windows features on or off**'.

The **Server Manager** is displayed.

- b.  If **Web Server (IIS)** is enabled, you will see **Web Services (IIS)** as a major item in the right side pane. If not installed, go directly to step c.

Scroll down to **Roles Services** and verify that the following are all 'Installed'

- i.  ASP.NET
- ii.  .NET Extensibility
- iii.  ISAPI Extensions
- iv.  ISAPI Filters

- c.  If **Web Server (IIS)** is not installed.

- i.  Select **Add Roles**.

The **Add Roles Wizard** is displayed.

- ii.  Select **Server Roles** in the left side pane, and check the **Web Services (IIS)** box.
- iii.  Click **Next** until you get to **Role Services**.
- iv.  Expand **Application Development** and verify that **ASP.NET**, **.NET Extensibility**, **ISAPI Extensions** and **ISAPI Filters** boxes are checked.
- v.  Click **Next** until the **Install** button is enabled and then click **Install**.

For Windows Server 2012

- a.  Launch '**Turn Windows features on or off**'.

Wait for the '**Add Roles and Features Wizard**' to appear.

- b.  Click **Next** until you get to the **Server Roles page**.
- c.  Enable **Web Server (IIS) (Installed)**.
- d.  Expand **Web Server (Installed)**.
- e.  Expand **Application Development (Installed)**.
- f.  Verify that **ASP.NET 4.5 (Installed)** is checked. You may be notified that dependent items were automatically checked.
- g.  Click **Next** to get to the **Features page**.
- h.  Expand **.NET Framework 3.5 Features** and check the **.NET Framework 3.5 (includes .NET 2.0 and 3.0)** box.
- i.  Expand **.NET Framework 4.5 Features (Installed)** and check both the **.NET Framework 4.5 Installed** and the **ASP.NET 4.5** boxes.
- j.  Click **Next** until the **Install** button is enabled and then click **Install**.

## Installation steps

1.  Download the installation file from <http://www.dovico.com/download.aspx>.
2.  Close all open applications, shut down any non-system critical services and stop all Anti-Virus/Anti-Spyware software. Failing to perform this step may cause installation problems.
3.  Run **PlanningandTimesheetV4.exe** and follow the setup instructions.
4.  You may be prompted to install a Crystal Reports 2008 Runtime service pack. The Crystal Reports wizard will guide you through these steps and then return to the Dovico installation process.
5. Typical prompt windows and questions are displayed during the installation. The following (5a - 5c) describes a few prompts and questions which are particular to Dovico Planning & Timesheet.
  - a.  On the Setup Type screen, select **Typical** and click **Next**. The Web Services API option installs additional components, which can be used by developers for custom programming.
  - b.  Configure Application Sharing (Windows Firewall): You may be prompted to open the **HTTP** port on the Windows Firewall. Select **Yes** and click **Next**. If you select No then no other users will be able to access the Dovico Planning & Timesheet application.
  - c.  Upgrading from a previous version? Select **Yes** if prompted about upgrading from a previous version.
6.  On the **Installation Wizard Complete** screen, click **Finish**.

### Notes:

- ✓ You may be required to reboot your computer at this point.
  - ✓ A .NET v4.0 update is available from Microsoft that eliminates issues for those using Internet Explorer 11.  
<http://support.microsoft.com/kb/2836939>
7.  Check to see if the **Job Scheduler** has **restarted**. If not, then restart it. (in Administrative Tools > Services).
  8. For **Windows Vista, Windows 7, Windows 8, Windows Server 2008 and Windows Server 2012** installations.
    - a.  Launch **Internet Information Services (IIS) Manager**.
    - b.  Open **ISAPI and CGI Restrictions**.
    - c.  All **ASP.NET v4.0** listings should be set to '**Allowed**'. If not, then right click the item and select **Allow**.
    - d.  Expand the **computer/server** in the left side pane and click on **Application Pools**.
    - e.  Select the **DovicoTimesheet** application pool.
    - f.  Right click and select **Basic Settings**.
    - g.  Set the **.NET Framework version** to **4.0** and set the **Managed pipeline** mode to **Classic**.
    - h.  Click **OK**.
  9. For **Windows Server 2003** installations only:
    - a.  Launch **Internet Information Services (IIS) Manager**.
    - b.  Expand the **computer** and select **Web Service Extensions**.
    - c.  Verify that **ASP.NET v4.0** is set to **Allowed**.
    - d.  From the left side pane, expand **Web Sites > Default Web Site**.
    - e.  Right click on **DovTimesheet** and select **Properties**.
    - f.  Check that the **ASP.NET version** is set to version **4**.
  10.  Select **Start, All Programs, Dovico Planning & Timesheet, Dovico Planning & Timesheet**.

11.  Dovico Planning & Timesheet will detect your previous database and display a message stating that the database must be upgraded, choose **OK**.
12.  If your database does not appear, login into the **Database Manager** and review the database's Status column. Use the **synchronize database.config** function to reconnect the database(s) (Maintenance > Synchronize database.config).
13.  Log into the database and **register the database** using the new registration key.
14.  Verify the database's **Regional Setting**. (Menu > Setup tab> Database Options> General tab).
15.  Repeat step 13 and 14 for each available database.

**IMPORTANT:** If there are difficulties in upgrading using the steps described above, an alternative is to perform a clean/complete uninstall of Dovico Planning & Timesheet (see page 12), install Dovico and manually restore/attach the databases.

## MIGRATE – from Dovico Timesheet

If migrating from **Dovico Timesheet version 12**:

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

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

If migrating from **Dovico Timesheet version 11**, follow the Upgrade instructions that begin on page 7.

# Performing a clean un-install of Dovico software

## Remove Dovico Timesheet (or Dovico Planning & Timesheet)

1.  **Backup** all Dovico databases to a **safe location** on your computer or server. This safe location **CANNOT BE** in Dovico's default installation directory (\Program Files x86\Dovico Software) as this folder will be deleted in upcoming steps.
2.  Go to Start > Control Panel > Administrative Tools > Services and **stop** the **Dovico Job Scheduler** service (if applicable).
3.  Login to Dovico's **Database Manager** and delete all Dovico databases.
4.  Select **Start > Control Panel > Programs and Features (Add or Remove Programs)**.
5.  Any Dovico Service packs must be removed first. They must be removed in the reverse order in which they were installed (e.g. Service Pack 3 first, Service Pack 2 second, etc...).
6.  Un-install **Dovico Timesheet** (or **Dovico Planning & Timesheet**)

## Remove Dovico shared instance of SQL Express 2005

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

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

## Remove Dovico folders

1.  Go to `\inetpub\wwwroot` and delete the **dovtimesheet** virtual directory.
2.  Go to the Dovico installation directory (by default C:\Program Files x86\)) and delete the **Dovico Software** folder.

## Cleaning up left over registry entries

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

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

1.  Select **Start, Run**, type `regedit` and click **OK**.
2.  Navigate to the following registry key.  
HKEY\_CURRENT\_USER\Software  
➤ Right click on any **Dovico** folder and select **Delete**.
3.  Navigate to the following registry key.  
HKEY\_LOCAL\_MACHINE\Software  
➤ Right click on any **Dovico** folder and select **Delete**.

# Technical Support, Resources and Documentation

## Dovico Technical Support

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

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

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