

APPENDIX D – ADVANTAGE Multi-User Installation & Setup For New Users

HomeTech ADVANTAGE Estimating System Version 4.1

This document provides details for the added program features of HomeTech ADVANTAGE Estimating System version 4.1. This document is only concerned with the program features that are new to the HomeTech ADVANTAGE 4.1 version of the software, and does not include the program features that have remained unchanged since the HomeTech ADVANTAGE 4.0 version of the program. This document is meant to supplement the existing documentation for the HomeTech ADVANTAGE Estimating System version 4.0.

One of the most beneficial differences between HomeTech ADVANTAGE 4.0 and HomeTech ADVANTAGE 4.1 is that the HomeTech ADVANTAGE 4.1 has networking capabilities, allowing users to share both Estimate and CostBook data on a network or server. The HomeTech ADVANTAGE 4.0 is a Single-User version of the software, and has limited data sharing capabilities. The HomeTech ADVANTAGE 4.1 will be available in two (2) versions as follows: (1) Single-User Version – This version will have limited data sharing capabilities, and (2) Multi-User Version – This version will have networking capabilities.

Another important benefit of the HomeTech ADVANTAGE 4.1 is that users will be able access the HomeTechOnline.net web site, thereby allowing users to update their accounts and to receive program downloads and program updates while online. This will allow for more payment options, greater flexibility in obtaining the program or program updates via online downloads, and provide a higher standard of customer support to the user.

TABLE OF CONTENTS FOR APPENDIX D

NEW USER SETUP FOR ADVANTAGE MULTI-USER VERSION

A. Data Sharing Considerations	3
B. Installation & Setup	6
C. Updating Your CostBooks With The Latest LAMI	9
D. Change The Setup Configuration	10

NEW USER SETUP FOR ADVANTAGE MULTI-USER VERSION

Data Sharing Considerations

GENERAL CONSIDERATIONS

There are three areas for consideration in regards to program setup and sharing data files. How you install and access these files should reflect the needs of your company and its estimators. The areas to consider are as follows:

1. DESTINATION FOLDER

The Destination Folder is the program folder created during the install process. This folder is named "HomeTech41" and contains the program executable, amongst other files required for the program to function. The program itself is accessed and executed from this folder. This folder must be located on a local drive for each computer (Example: C:\ drive or D:\ drive). Each computer must have it's own destination folder on a local drive. By default the destination folder is:

C:\Program Files\HomeTech41

Unless you have specific preference to a different location for the Destination Folder, it is recommended you simply use the default location during installation. The location of the Destination Folder can be changed in the "Destination Folder" window during the installation of the program.

2. COSTBOOKS FOLDER

The CostBooks Folder is a folder that contains the data regarding the four HomeTech ADVANTAGE CostBooks (Remodeling & Renovation, Kitchen & Bath, Handyman, and Housebuilders). This includes any custom items and custom assemblies you have created in the databases, as well as any modifications you made to the default line items and default assemblies. The CostBooks Folder contains your client database, which saves all your client information. The CostBooks Folder also contains the forms from the Contract Writer, including any custom forms or modifications you have added.

During installation of the program, you will be prompted to choose the location on your network or server where you want to store your CostBook data. Having the ability to share the HomeTech CostBook data on a network or server will allow multiple estimators to simultaneously access the same group of cost data. By default during installation, the install routine will automatically search for and locate your server or network drive. If you want to change the location of the CostBook Folder, choose the CHANGE button. **Unless you have specific preference to another location, it is recommended you use the default location.**

NEW USER SETUP FOR ADVANTAGE MULTI-USER VERSION

The typical setup location for the CostBooks Folder accessed from the local drive of a computer (a setup where CostBook data is not shared) is as follows:

C:\Program Files\HomeTech41\CostBooks

Where the C:\ represents a local drive found on the computer.

The typical setup location for the CostBooks Folder accessed from a network or server (a setup where CostBook data is shared) is as follows:

Z:\HTData\CostBooks

Where Z:\ represents a network drive or server drive.

3. ESTIMATES FOLDER

The Estimate Folder is a folder that contains the data regarding any estimate(s) you may have created. The Estimates Folder also contains your Cover Page information, to include your default cover page as well as the cover pages for individual estimates. Also included in the Estimates Folder is a subfolder named EMAIL where, by default, estimates saved as text documents (Rich Text Format) are stored.

During installation of the program, you will be prompted to choose where you want to store your estimate data, either locally on the individual computer or on a network or server. During installation, if you choose STORE ESTIMATES ON LOCAL DRIVE the Estimates Folder on that computer will not be shared. Also, that particular computer will not be able to access any estimates stored on a network or server. During installation, if you choose STORE ESTIMATES ON SERVER, the Estimates Folder will be accessed from the network or server drive. With this setup, all estimate data regarding the Estimates Folder is saved to the user's network or server drive. All users wanting to share data amongst multiple computers should access their data from the same location on the network or server. With this configuration, the user will have access to estimates created from other computers (with the same setup). **Even though multiple computers may simultaneously have access to the same estimate data, only one user can open any given estimate at any given time.**

The typical setup location for the Estimates Folder accessed from the local drive of a computer (a setup where estimate data is not shared) is as follows:

C:\Program Files\HomeTech41\Estimates

Where the C:\ represents a local drive found on the computer.

The typical setup location for the Estimates Folder accessed from a network or server (a setup where estimate data is shared) is as follows:

Z:\HTData\Estimates

Where Z:\ represents a network drive or server drive.

NEW USER SETUP FOR ADVANTAGE MULTI-USER VERSION

SHARING SUMMARY

The HomeTech ADVANTAGE 4.1 Cost Estimator Multi-User software allows the user to share and access estimates, CostBook data, client information, and various documents from a network or server location. At the same time, a user is able to customize the settings of their HomeTech ADVANTAGE 4.1 Cost Estimator Multi-User program on their individual computer to meet their needs and estimating style. The following list summarizes the sharing capabilities of the HomeTech ADVANTAGE Cost Estimator 4.1 Multi-User program.

	AREA OF PROGRAM	SAVED IN	SHARE DATA ON NETWORK?
1	User Created Estimates	Estimates Folder	YES
2	HomeTech CostBooks	CostBook Folder	YES
3	Custom CostBook Items	CostBook Folder	YES
4	Assembly Database	CostBook Folder	YES
5	Client Information	CostBook Folder	YES
6	LAMI Areas & Data	LAMI Folder	YES
7	Contractor Information (Utilities pull-down-Setup)	NA	YES
8	Contract Forms (Custom & Default)	CostBook Folder	YES
9	User Created Division Titles	NA	YES
10	User Created Phase Names	NA	YES
11	Default Program Markups (Utilities pull-down-Setup)	NA	YES
12	Estimate Grid Layout	NA	NO
13	Program Preferences (Utilities pull-down-Setup)	NA	NO
14	Database Defaults (Utilities pull-down-Setup)	NA	NO

NEW USER SETUP FOR ADVANTAGE MULTI-USER VERSION

Installation & Setup

GENERAL CONSIDERATIONS

The process for installing the HomeTech ADVANTAGE Cost Estimator 4.1 Multi-User version is very similar to the installation process of the HomeTech ADVANTAGE Single-User version, and many other software programs available today. With the HomeTech ADVANTAGE 4.1 Multi-User installation the following exceptions should be considered:

You will be installing the program on multiple computers. You will setup each computer to read centrally located data files, therefore all computers will access and share the same data. This setup process can be accomplished during the installation of the program on each computer.

Prior to installation you will need to determine the best data sharing setup for your company. During installation, you will be prompted to choose where you want to install and access (1) The program folder on the local computer, (2) The Estimate Folder (either local or networked), and (3) The CostBook Folder (on the server or network). The needs of your company and estimators, as well as your style of estimating, should dictate the setup style that will work best for your particular company.

SYSTEM REQUIREMENTS

Please review the following system requirements. These are the minimum system requirements needed to install HomeTech ADVANTAGE Cost Estimator. These requirements apply to each computer the user will install the HomeTech ADVANTAGE program.

An IBM or 100% compatible personal computer or higher processor, running Windows 98, NT, 2000, ME, or XP.

Minimum of at least 400 MHZ CPU is recommended.

Minimum of 64 megabytes RAM.

Standard MPC compliant CD-ROM drive.

Hard disk with at least 40 MB of free space.

VGA (640 x 480 or higher) color monitor.

Windows compatible mouse.

Any printer supported by Windows.

NOTE: The HomeTech ADVANTAGE Cost Estimator 4.1 Multi-User program has been tested and functions properly with Windows 98 operating system. It should be noted that the "First Installation" of the HomeTech ADVANTAGE Cost Estimator 4.1 Multi-User program should NOT be on a computer using the Windows 98 operating system.

NEW USER SETUP FOR ADVANTAGE MULTI-USER VERSION

INSTALLATION

To install the HomeTech ADVANTAGE Cost Estimator 4.1 Multi-User version to your computer(s), complete the following procedure:

1. Close any open programs, and return to your desktop.
2. Disable any anti-virus software from running in the background.
3. Ideally, you will want to close any programs running in the background. From your Desktop, choose CTRL+ALT+DEL to display the Task Manager. From the Task Manager window, close as many programs as possible **except Explorer and Systray**. Once you have completed closing the programs, close the Task Manager window and return to your desktop.
4. Insert the HomeTech ADVANTAGE Cost Estimator version 4.1 CD-ROM into your computer's CD-ROM drive.
5. The CD should auto-run by itself. If not, choose START menu, choose RUN, choose BROWSE. Browse to your CD-ROM drive. Choose LAUNCH.EXE, choose OK in the "Browse" window, and then choose OK in the "Run" screen.
6. The "Welcome" screen will appear. Choose INSTALL THE HOMETECH ADVANTAGE COST ESTIMATOR.
7. This will display the "InstallShield Wizard" window. Choose NEXT to continue with the installation. Choose CANCEL to abort the installation.
8. Choosing next will display the "License Agreement" window. Read the license. If you agree with the terms and want to continue with the install, choose I ACCEPT THE TERMS OF THE LICENSE AGREEMENT. Choosing I DO NOT ACCEPT THE TERMS OF THE LICENSE AGREEMENT will not allow you to continue with the installation.
9. Choosing next will display the "Customer Information" window. Enter the User's Name, Company Name, Serial Number, and Key Code in the spaces provided. Once all information is entered, choose NEXT to continue.

NOTE: PAY PARTICULAR ATTENTION WHEN ENTERING YOUR SERIAL NUMBER AND KEY CODE. MAKE SURE TO DISTINGUISH "ZEROS" AND "OHS", "ONES" AND "ELLS", "FIVES" AND "ESSES", ETC. THERE SHOULD BE NO "OHS" IN THE KEY CODE; ALL SHOULD BE ENTERED AS "ZEROS".

NEW USER SETUP FOR ADVANTAGE MULTI-USER VERSION

10. This will display the “Destination Folder” window. The Destination Folder is the location where the program is installed on your computer. For the Multi-User version of the software, this destination folder can be, and usually is, a different location from the data files. To change the default location of this folder, choose the CHANGE button and select the new location for the Destination Folder. **Unless you have specific preference to another location, it is recommended you use the default location.** To accept the default location (recommended) and continue with the installation, choose NEXT.

11. This will display the “Database Folder” window. From this screen, the user can choose which data files are shared on the network or server, and the user can also choose the location of where these data files are saved. The user will need to choose either STORE ESTIMATES ON LOCAL DRIVE (The estimates will not be shared with other computers on the network or server), or STORE ESTIMATES ON SERVER (Estimates can be accessed and shared by all computers on the network or server with the same setup configuration). Next, to change the default location of the CostBook folder, choose the CHANGE button and select the new location for the CostBook Folder. **Unless you have specific preference to another location, it is recommended you use the default location.** To accept the default location (recommended) and continue with the installation, choose NEXT.

12. This will display the “Verify Setup Configuration” window. Check all information for accuracy. If all information on this screen is correct, choose NEXT to proceed with the installation. If any information is incorrect, choose the BACK button to recheck any entered information (In particular, your Serial Number and Key Code). If the information on this screen is still incorrect, choose CANCEL to cancel the installation, and then contact HomeTech Information Systems, Inc. – Software Department at 1-800-638-8292.

13. Choosing next will display the “Ready To Install The Program” window. Choose NEXT to begin installing the HomeTech ADVANTAGE Cost Estimator 4.1 Multi-User version to your computer.

14. Once the installation is complete, choose FINISH to return to the “Welcome” screen.

15. Choose EXIT to close the “Welcome” screen and return to your Desktop.

16. The HomeTech ADVANTAGE Cost Estimator 4.1 Multi-User version of the program is now installed on the first computer.

17. Complete this process for each computer on your network or server that you intend to use the HomeTech ADVANTAGE.

18. Proceed to *Section 2: Setting Up HomeTech ADVANTAGE* in the **Getting Started Manual** to load the Local Area Modification Index (LAMI), and to setup Authorized Users.

NEW USER SETUP FOR ADVANTAGE MULTI-USER VERSION

19. Once installation on all computers is complete, be sure to update each computer with the latest applicable program updates (For more information, refer to APPENDIX B – Using The HomeTechOnLine.net Website To Manage Your Account). Also, be sure to update the CostBook Folder with the latest quarterly LAMI update (For more information, refer to **APPENDIX B – Using The HomeTechOnLine.net Website To Manage Your Account**, and **APPENDIX D – New User Setup – Updating Your CostBooks With The Latest LAMI**).

NOTE: The HomeTech ADVANTAGE Cost Estimator 4.1 Multi-User program has been tested and functions properly with Windows 98 operating system. It should be noted that the "First Installation" of the HomeTech ADVANTAGE Cost Estimator 4.1 Multi-User program should NOT be on a computer using the Windows 98 operating system.

Updating Your Cost Books With The Latest LAMI

GENERAL CONSIDERATIONS

If you are sharing the HomeTech ADVANTAGE CostBook data on a network or server, there will be an additional step required to update the CostBook data with the quarterly LAMI updates. By default, when running/unzipping a LAMI update (Example: 2004LAMI.exe), the location the update files are being unzipped to is on the local drive (Example: C:\Program Files\HomeTech41\CostBooks). You will need to change this default location to the location on your network or server drive where you have setup and saved the CostBooks Folder (Example: Z:\HTData\CostBooks). You will only need to update one (1) computer since all computers sharing the CostBook Folder access the same data.

Make sure to close the HomeTech ADVANTAGE program from all other computers prior to beginning the LAMI Update. (For more information, refer to **APPENDIX B – Using The HomeTechOnLine.net Website To Manage Your Account**).

NEW USER SETUP FOR ADVANTAGE MULTI-USER VERSION

Change The Setup Configuration

GENERAL CONSIDERATIONS

Should you ever want to change the data sharing setup configuration after the program has been installed, there are two options available to the user. These options include the following:

1. UNINSTALL & REINSTALL THE ADVANTAGE PROGRAM

This option is probably the simplest to complete. **It is highly recommended that you complete a system backup for the HomeTech ADVANTAGE Cost Estimator 4.1 immediately prior to uninstalling the program.** This system backup can be completed from within the program (Data Backup), or manually make a copy of the CoskBooks Folder and Estimates Folder located on the network or server (Example: Z:\HTData\CostBooks and Z:\HTData\Estimates).

2. MANUALLY MODIFY THE HTCLIENT.INI SETUP FILE

The other option in regards to modifying the program setup would be to manually modify the setup file (HTClient.ini). This must be completed for each computer on which you want to change the setup configuration. Or you can copy a modified HTCLIENT.ini file and use the modified file to replace the existing file on another computer. By default, the HTClient.ini file is located in the following location on your computer:

C:\Windows\HTClient.ini

The HTClient.ini file can be opened in NotePad by double-clicking on the file itself (or right-click on the file and choose OPEN). Once open in NotePad, make any desired changes and then save the changes (Choose the FILE pull-down menu, then choose SAVE).

To locate the file yourself, do a search for the file. To search for a file, complete the following procedure:

Choose the START menu from your Desktop.

Choose FIND or SEARCH.

Choose to search for ALL FILES AND FOLDERS.

Once in the "Search" window type in the name of the file (HTClient.ini) you want to search for in the provided box. Choose to search your local drive (Example: C:\).

Choose SEARCH to begin your search.

Once the file is located, double-click on the found file to open it.

NEW USER SETUP FOR ADVANTAGE MULTI-USER VERSION

SAMPLE HTCLIENT.INI FILES

Below you will find two (2) sample forms of the HTClient.ini file as follows:

1. LOCAL DRIVE SETUP

In this example both the Estimate Folder and CostBook Folder are accessed from the local drive only. In this configuration, neither the Estimate Folder nor the CostBook Folder is shared.

```
[Client Network]
ClientData=C:\Program Files\HomeTech41\
[HT Databases]
HND=EC:\Program Files\HomeTech41\CostBooks
Serial=12345
HTH=EC:\Program Files\HomeTech41\CostBooks
BTH=EC:\Program Files\HomeTech41\CostBooks
HTR=*C:\Program Files\HomeTech41\CostBooks
MultiUser=Yes
Version=4.1
KeyCode=7Z7X-Q7QZ777X7
[HT Configuration]
HomeDir=C:\Program Files\HomeTech41\
EstimateDir=C:\Program Files\HomeTech41\
```

2. NETWORK OR SERVER SETUP

In this example, I have chosen to save both the Estimate Folder and CostBooks Folder on my network or server in a folder named "HTData". In this case, both the Estimate Folder and the CostBook Folder are being shared with other computers with the same configuration.

```
[Client Network]
ClientData=Z:\HTData \
[HT Databases]
HND=EZ:\HTData\CostBooks
Serial=12345
HTH=EZ:\HTData\CostBooks
BTH=EZ:\HTData\CostBooks
HTR=*Z:\HTData\CostBooks
MultiUser=Yes
Version=4.1
KeyCode=7Z7X-Q7QZ777X7
[HT Configuration]
HomeDir=C:\Program Files\HomeTech41\
EstimateDir=Z:\ HTData
```

NOTE: Pay attention to the Estimate Directory path and/or the CostBook Directory path when modifying these path names. **Notice that the Estimate Directory path does not include the Estimate folder in the path name. The CostBook Directory does include the CostBook folder in the path name.**