Initial Installation, Configuration & Training

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FileMaker Installation

You will need to have FileMaker Pro, version 11 v4, installed on each computer on which you intend to run this system. Note: If you have purchased the latest version, FM12, you need to downgrade to FM 11.4. You'll have to pay FileMaker $5.00 for the downgrade. We will advise you when the FM12 version of **iProjects** is available.

Follow the installation instructions shipped with FileMaker. If you don't have v4, you can download it from: http://www.filemaker.com/support/downloads/?nav=support-downloads

If you are planning to run it on more than nine machines, you will need FileMaker Server installed on your server. (Theoretically, up to 9 machines can be linked, "peer to peer", on FileMaker's built-in network; however you will experience some slowdown with this many running peer-to-peer. We recommend not over 3).

For instructions on how to set up the peer-to-peer networking, see UserGuide 6.2: Small Office Systems.

For server installations, see UserGuide 6.3: Server-based Systems.

Plugins

Four "plugins" – files that modify FileMaker – are required to operate **iProjects**. You must have these plugins installed prior to opening iProjects, otherwise it will not open, or, depending on the plugin, will throw up error messages when you open it.

For PC users: The required plugins are xmCHART.fmx, Troi_File_Plugin.fmx, Kargas_DialogPlugin.fmx and Mailit.fmx. Download the plugins from:

http://iss.insightfulsystems.com.au/iprojects/iProjectsPlugins_Windows.zip

For Mac users: The required plugins are xmCHART.fmplugin, Troi_FileForMac.fmplugin, Kargas__DialogPlugin.fmplugin and Mailit.fmplugin. Download the plugins from:

http://iss.insightfulsystems.com.au/iprojects/iProjectsPlugins_Mac.zip

Installation: After installation of the FileMaker software, first expand (unzip) and then copy all plugin files into the Extensions folder in FileMaker, on each computer to run the **iProjects** software. If you are running **iProjects** on a server, install all four plugins into the Extensions folder of the FileMaker Server application as well.

Initial System Configuration

Double-click the **Open iProjects** file. If for any reason it does not open FileMaker, open FileMaker first, then open this file from FileMaker.

When the system opens, you will first see the license agreement. If you click "I Agree", next you will see the Login dialog box shown right.

Click on the arrow to the right of the Login name; you'll get a drop-down window with the name "User". Select "User" and type in the password "User"; then click the Login button. The system will open.

You will now see the "HOME" screen for the system. You will have one or more "sample" contacts listed under "My Contacts" and one sample project under "My Projects".

NOTE: The Registration screen is shown before the Login screen if the Registration details are invalid. Once valid Registration details have been entered, the Login screen will show.
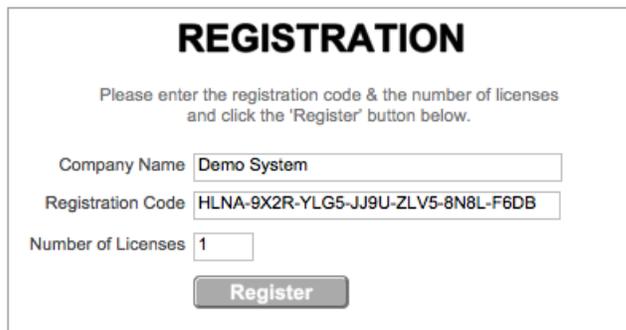
Registering your software

The next step is to register your software. To do that, Click on "Office Admin", just below the Contacts tab. You will see the registration window shown right.

There is other information for you to enter on this page; we'll return to that below. If you don't register the software, it will cease working after about two weeks.

It is important to enter firm name, etc., in these fields **exactly** in accordance with the pre-registered information that has been set up for you, and sent in an email to you. We suggest that you "cut and paste" this information from the email to avoid a problem. If there is any discrepancy between the two, you will not be able to use the software. When you have done that, click the "register" button, which will send the information you've entered to our Registration page.

Ensure that you are connected to the internet, so the connection can be made. The **iProjects** registration service will compare your details with the pre-set data, and log you in as a registered user, for the designated number of licenses, if the information matches. You'll get a confirmation of the registration.

Getting started

Note the set of buttons in the upper left of the screen, shown right. The four white buttons are on every system screen, and are your most basic navigation tool. The "house" icon is "Home" and clicking it always takes you to this screen. The left and right arrows move to the previous screen or the next screen, if you have moved back a screen. The [**?**] mark button takes you to the Help screens.

The *Contacts* and *Projects* tabs take you to those Modules, respectively.

Second, to introduce you to the core Module: Click on the *Contacts* tab, then click on *Find All* and then *Show List*. You'll see all the sample contacts in the system.

Pick any firm or person, and click on the red arrow to the left of the Firm or Person name. Now you are on their record. Note the little white star to the right of either the Firm name or the Person surname. Click that star – you will see it turn to yellow.
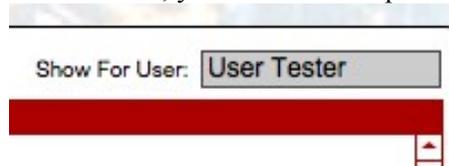
Now click the Home icon to take you back to the Home screen; Voila! – you now have that firm/person in *My Contacts*. Do this a couple more times; with both firms and people. This is your list of "favourites" – those you need to contact often.

Next, we'll assign you a project. Click on the *Projects* tab. Probably the Demonstration Project will come up, but if it doesn't, click on *Find All* and *Show List*.
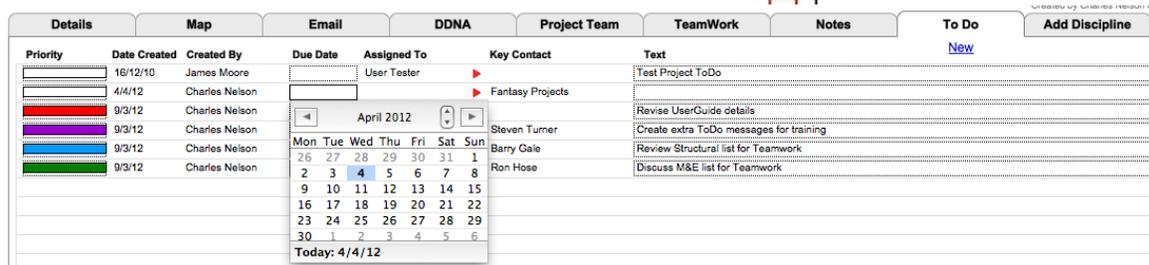
You'll see the Demonstration Project. Click the red arrow to its left, and you will get the *Details* page for the project. Note that to the right of the *Project Name* box there is a small white star, like the one in *Contacts*. Click this star, which turns yellow, and go back to your *Home* page. This project is now listed as your project, which means you can go to it instantly when you log on.

Finally, we will create a To Do item for you. Note the "Show for User" box on the right of the *ToDo* window. Click the "User Tester" field; you will see a dropdown panel, but the only name on it is "User Tester" – that's   you!

To create a To Do item, now   Show For User: User Tester   go to Projects>To Do, and click the New button   below the tab. You will see this layout:

Details	Map	Email	DDNA	Project Team	TeamWork	Notes	To Do	Add Discipline

Priority	Date Created	Created By	Due Date	Assigned To	Key Contact	Text
	16/12/10	James Moore		User Tester		Test Project ToDo
	4/4/12	Charles Nelson			Fantasy Projects	
	9/3/12	Charles Nelson				Revise UserGuide details
	9/3/12	Charles Nelson			Steven Turner	Create extra ToDo messages for training
	9/3/12	Charles Nelson			Barry Gale	Review Structural list for Teamwork
	9/3/12	Charles Nelson			Ron Hose	Discuss M&E list for Teamwork

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Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Today: 4/4/12

Select a Due Date (today's date is fine), assign a priority by using the drop-down panel at left, and enter some text in the "text" field. Using the drop-down under "Assigned to", click "User Tester".

Now return to the *Home* screen, and you will see that this item is now assigned to you. Clicking the red arrow against that item will take you back to the *To Do* screen for the Demonstration Project. At the moment, nobody else in the firm is registered. Once others are registered, you would be able to reassign the To Do to someone else on the project team.

Assigning system users

So far, you have been identified as "User Tester". It's time to tell *iProjects* who you *really* are! To do that, from *Home*, click on the *Office Admin* tab, then on the *Users* tab. You will see the following layout, but without the data on the right side. Click on Manage to the right of User Tester, and you will see all the data below (next page) on the right side.

First, click on the <u>New</u> button over the <u>Manage</u> column. This creates a new entry to the right, where you enter your full name, your Login name, your Password, and your initials. You need all of those. You are now in the system, and if you have your Internet on, the **iProjects** master system will record this information. The next time you log in, use this User name & Password.

However, you do not yet have any privileges. To assign privileges, click on the "Update" button to the upper right of the Privileges list. A popup window will ask if you want to update privileges for <user name>. Click "Yes". You are returned to the Firm Details tab screen. Just click back on the Users tab, and you will see that you have been assigned a full list of privileges, ready for editing.

Now look at the **Privileges** table. These are all the privileges available to any system User. As the Firm System Administrator, you need to leave all of these checked as they are – this gives you maximum access. Also check the two unchecked items – Edit Sample DDNA and Manage & See Restricted Email.

Now create a new user name and password for each person you expect to use the software. For now, make the name and the password the same – passwords can be changed later so that users can prevent others from seeing their password.

Full Name	**User Tester**	Assign To Contact
Login Name	User	
Password	User	
Initials	UT	
Office Location	YOUR FIRM NAME **GOES**	

☐ Notify when a new version is available   ☒ Sample?

Privileges

Access?	Title		Update
☒	**System**	11	Delete
☒	Access Office Admin	7	Delete
☒	Access System Admin	122	Delete
☒	**Contacts**	8	Delete
☒	Access/Find Contacts	14	Delete
☒	New Contact	15	Delete
☒	Delete Contact	16	Delete
☒	Delete Sample Contacts	9	Delete
☒	Approved For	21	Delete
☒	**Projects**	1	Delete
☒	Access/Find Projects	10	Delete
☒	New Project	12	Delete
☒	Delete Project	13	Delete
☒	Create Tasks when empty	2	Delete
☒	Create Form when empty	3	Delete
☒	Manage Checklist	4	Delete
☒	Rename Tasks	5	Delete
☒	Rename Actions	6	Delete
☒	New ProjectTeam	17	Delete
☒	Delete ProjectTeam	18	Delete
☒	New DDNA	19	Delete
☐	Edit Sample DDNA?	22	Delete
☒	**Email**	123	Delete
☒	Access/Find Email	124	Delete
☐	Manage & See Restricted Email	126	Delete

Each time you create a new User name, that name will appear on the dropdown Login panel. Only the person (you) or another person with "Access Office Admin" privileges can see the passwords – so you want to <u>uncheck</u> that item (2nd on the list) for all **but** those people you want to give access to everything. That should be two or three people, no more than three.

Note that four items on the list are **bold**: **System, Contacts, Projects** and **Email**. These four are headings and must be left checked for all users.

All of the rest are up to you: you can give each staff person a different set of privileges, simply by checking/unchecking features to which they have access.

You can change these privileges at any time, on an as-needed basis, to give senior staff more control over how they interact with the system.

It is better to err or the side of caution, and restrict access until you are familiar with the system, and know that your staff understand it.

We will go through each of these items in the *User Guides -* but for now, we suggest that you provide the set of privileges shown at right for all but the 2 or 3 selected system administrators who have full access.

Sample data

The system includes sample data to help understand the system: A number of contacts, and a sample project "Demonstration Project". You may well find yourself and your firm listed.

You can delete this sample data at any time, but we suggest it is better to leave it in for a while to help familiarise your staff with the system. Better they muck around with a fake project than a real one!

Note that if you delete sample contacts, *Contacts* will be empty unless you have entered contacts either manually or by batch. The two Excel files in your setup folder are used for batch entry of

contacts from your present contact system; a section in the *User Guides* will describe how to do that.

NOTE: iProjects contains a great deal of *content* – checklists and other data. We give you complete freedom to change this content to suit your practice. However, if you change the content, and we issue a new release with new content (for example when we revise checklists because of a new standard form of contract), the potential is there to over-ride your changes. There is no easy answer to this issue. There are only two choices: (1) We update your master system without changing any of your content – and provide you with a separate list of new content for you to insert, or (2) We update both your system and your data, which will over-ride your changes.

After much consideration on this, we will proceed as follows:

♦ We will issue updates with content, but will identify all content changes with blue text for additions (previously advised changes will be displayed in black), and advise on deletions;

♦ If you choose to revise content, you need to leave the original "Architecture" DDNA intact, and make a copy of it, which you can call "Architecture 2" or anything you want. Make your changes in that copy.

♦ When we issue an update, it will update the master copy and leave your revised copy intact.

♦ You can compare the "blue text" revisions to your revisions, and make your own decision about what to incorporate from the update. You could either update your version by cutting and pasting, or create a new copy of the master, and update it with your revisions by cutting and pasting – whichever was less work.

Customising printable forms to your firm identity

This is really easy, provided you can live with the standard space we have provided on typical forms. Just open Office Admin, you will see three fields under the first tab:

Type your firm name, address, phone numbers, etc., into the "Office name and address" field. You can use any combination of fonts, sizes and colours as long as you stay within the edges of the box.

If you have a separate firm long that will fit within the outside "Firm logo" box, copy and paste it into the box.

Finally, enter your Firm name in the "Home screen header" box, replacing Building Technology Pty Ltd (unless this field is blank). Then, go back to the Home screen, then to Projects > Details, and click on any of the Tools or Checklists. You should see the data you have just entered.

Scroll feature on your mouse

FileMaker™ uses the scroll feature on a mouse to move through a list, for example to display the contents of records in an inventory list. If scrolling is enabled on your mouse, as you move the mouse around, FileMaker will scroll through projects – as each project is a record in FileMaker™.

This feature can be a problem if you use the same mouse for other applications that require you to have scrolling enabled, for example Revit™. If this is your situation, you have two options:

❖ Turn off scrolling before you start using the mouse with **iProjects**, or

❖ Get another mouse, so you use one for **iProjects** and the other for the other application.

Help

Now it is time to start exploring **iProjects**. When you get stuck, see if there are other User Guides on the website that will help you – just go to the "**?**" mark in the header of any page and you'll go there. We are working on these User Guides; it will take us a while to get them all checked and up on the website.

If doing that still leaves you frustrated, CALL US! Ring Elina or Charles, at 03 9686 3846.

Training

iProjects mirrors the design process itself – which is complex. Ergo, **iProjects** will seem complex until one gets used to it. *There is a learning curve*. Your staff will get up that learning curve far faster, and feel much less frustrated, if they receive training in using the system.

Accordingly, we make training available at a modest cost. Contact us on 03 9686 3846 for a training quote.