



# INSTALLATION GUIDE

# Table of Contents

- OVERVIEW ..... 3**
- Server vs. Workstation Install ..... 3
- Required Software Applications ..... 3
- Supported Operating Systems and Software Versions ..... 3
- WHAT YOU WILL NEED..... 4**
- PREPARATION..... 5**
- INSTALLATION..... 6**
- Step 1 - Confirm or Install Prerequisites ..... 6
- Step 2 - Install Integrator ..... 6
- Step 3 - Obtain Software License ..... 6
- Step 4 - Create Connections ..... 7

# Overview

Event 1 Software provides services personnel to guide you through the initial installation process of Event 1 Integrator. There is certain information you must have available for this to be successful and there are also certain tasks that you should perform in advance.

The purpose of this document is to provide all of the information you will need in order to be prepared to engage a services representative on the day you will be installing Integrator. Please read this document, ask any questions you may have, and identify any items that could delay or prevent the installation.

## ***Server vs. Workstation Install***

A question that is commonly asked is whether Integrator needs to be installed on the server. It does not. It may be installed on as many workstations as needed, on a terminal server or Citrix server. You may wish to install it on a server only for the purpose of facilitating unattended/scheduled operation because a server will be running at all times and would accommodate a scheduled run off-hours. For that purpose, the target environment does not need to be a server but simply a computer that will be left on so that the scheduled task can run.

## ***Required Software Applications***

Any computer on which Integrator is installed must have the following applications installed and/or have access to the respective application databases:

- **Sage Timberline Office**

This must include, at minimum: Accounts Payable, Job Cost, and ODBC.

- **Meridian Prolog Manager**

This may be skipped so long as the SQLDMO component of SQL Server is installed by either installing Prolog Administrator or by installing SQL Client Tools from your SQL Server installation CD.

**The following applications are expected to be installed prior to the engagement of a services representative to assist you with installation. Failure to have these applications installed in advance can result in the need to reschedule your installation or increased time needed to complete the installation.**

## ***Supported Operating Systems and Software Versions***

Visit the Event 1 Software website for details regarding supported operating systems and specific versions of the above applications that are supported.

# What You Will Need

The following information is needed to proceed with installation. When working with your services representative, the absence of any of this information (or permissions) may result in a delay of your installation or additional time needing to be spent.

- **Windows/Network User name and Password**

The account that you use must have permissions to access each of the software applications (Sage Timberline and Prolog Manager) and any folders or files that those applications require access to according to their respective documented requirements.

- **Prolog Manager Serial Number**

This is required for downloading and installing the Meridian AI-SDK component.

- **Sage Timberline Office User name and Password**

It is recommended that you use an application administrator account during installation and implementation. A non-administrator account can be used if granted the following minimum set of permissions however specific workflow tasks associated with data being exchanged may be necessary beyond this list depending on your specific workflow:

- Common Tasks – Tools – Macros <sup>1</sup>
- Common Tasks – Tools – File Tools
- Job Cost – Tasks – Post Entries <sup>2</sup>
- Job Cost – Setup – Extras <sup>3</sup>
- Job Cost – Setup – Cost Codes <sup>3</sup>
- Job Cost – Setup – Categories <sup>3</sup>
- Job Cost – Tools – Import – Commitments
- ODBC – Read Access – AP Master files
- ODBC – Read Access – BL WIP files <sup>4</sup>
- ODBC – Read Access – JC Master files
- ODBC – Read Access – JC Transaction files
- ODBC – Write Access – AP Master files <sup>5</sup>
- ODBC – Write Access – JC Master files

<sup>1</sup> Required if intending to automate functions that send Contracts and Subcontract Cos from Prolog Manager to Sage Timberline Office such that files will not need to be manually imported

<sup>2</sup> Required if you intend to include posting of committed cost entries associated with Contracts and Subcontract Cos as part of a macro.

<sup>3</sup> Required if entries sent to Sage Timberline Office will result in the creation of new records.

<sup>4</sup> Required only if you intend to use Billing WIP records as the source of cost information flowing into Prolog Manager

<sup>5</sup> Required if you intend to allow Integrator to create or update AP Vendor records based on changes to Company records made in Prolog Manager

- **SQL Server User name and Password**

It is recommended that you use the built-in **sa** account (system administrator) or an account with system administrator rights during installation. As part of the initial setup of Integrator, an account named SDKUser will automatically be created and configured for you with the required permissions. Once this has been accomplished, you may use a non-administrator account so long as it is granted the following permissions at a minimum:

- Access to database named Integrator with the following role members:
  - db\_datareader
  - db\_datawriter
  - db\_ddladmin
- Access to each Prolog Manager database you will be integrating with the following role members:
  - db\_datareader
  - db\_datawriter
  - db\_ddladmin

# Preparation

A successful implementation of Integrator depends on having the ability to configure and test the integration before using it with live data. To accomplish this, we recommend that you create a copy of your Sage Timberline Office and Prolog Manager databases that can be used for this purpose. All configuration, training, and pilot-testing will be performed using these copied databases. At the point you are ready to begin using Integrator with your live databases, the configuration options you selected can be copied over to a connection that connects your live databases.

You can complete the following tasks prior to the date of your installation of Integrator. Your services representative can assist you with these tasks just prior to installation if needed.

**Keep in mind that in order to make copies of databases, all users must first log out. This may therefore need to be performed during off hours or coordinated with your staff in advance.**

## 1. Make a copy of your Sage Timberline Office database

- The easiest way to accomplish this is to use the File Tools application within Sage Desktop. This is found in the **Tasks** list under **Sage Timberline Office – Common Tasks – Tools – File Tools**. Use the **Copy** option to create a copy of all (or selected) data files in a separate folder.
- If you require assistance, your support representative may be able to help you or you may wish to contact your Sage Timberline Office support representative or consultant.
- Once the copy has been created, confirm that you can access the copied data folder when you open a Sage Timberline Office application.
- For clarity, we recommend that you go to **File – Company Settings** and change the name of the company in the copied data. This will make it clear to other users that this is not your live database.

## 2. Make a copy of your Meridian Prolog Manager database

- The easiest way to accomplish this is to use the **Backup Database** and **Restore Database** options within Prolog Administrator (found under the **Database** menu). Alternatively, you can use the Backup and Restore tasks within SQL Management Studio.
- If you require assistance, your support representative may be able to help you or you may wish to contact your Prolog Manager support representative or consultant.
- Once the copy has been created, confirm that you can access the copied database when you open Prolog Manager. Note that you will need to create a new connection profile by clicking the Setup button in the **Open Database – Logon** window.

# Installation

The installation process consists of four steps as follows. Your services representative will guide you through this process via an online session:

1. Confirm or Install Prerequisites
2. Install Integrator
3. Obtain Software License
4. Create Connections

## ***Step 1 - Confirm or Install Prerequisites***

1. **Confirm that Sage Timberline Office is installed.**
2. **Confirm that at least one of the following is installed.**

Note that (b) and (c) would only apply if you do not intend to run Prolog Manager on the same workstation where Integrator will be installed.

- a. Meridian Prolog Manager
- b. Meridian Prolog Administrator
- c. SQL Server – Client Tools

This can be installed from your SQL Server installation CD by selecting “Client Tools Only” during the installation process so that a new SQL Server instance is not installed on the target machine.

3. **Confirm that the AI-SDK is installed.**

This would be shown in the **Add or Remove Programs** window as **Application Integration SDK**. If not found, download the version that matches the version of Prolog Manager using the SupportLink page on the Meridian Systems website. You will need your Prolog Manager serial number to access this page:

<http://support.meridiansystems.com/login.aspx>

## ***Step 2 - Install Integrator***

1. **Download the software.**

Use the download link provided to you to download the software. The file that you download is a self-extracting WinZip file.

2. **Extract the installation program.**

Run the file that you downloaded to extract the installation program. The default location for the installation program will be C:\Event1

3. **Follow the installation instructions.**

Upon extracting the installation program, a set of installation instructions will be displayed in your default web-browser. Follow these instructions to complete the installation of the software.

## ***Step 3 - Obtain Software License***

1. Click **Start**, then **Programs**, then **Event 1 Software**, and then **Integrator**
2. Upon initial startup you will receive a prompt about creating a connection. Click **No** to dismiss this.
3. Click the **Help** menu, then **License**, and click **Licensing**
4. In the **Company Name** box, type your company name as it appears in the email you received from Event 1 Software with your license information.
5. In the **Select** column, check the box for **Event 1 Integrator**
6. In the **License ID** column, type (or copy/paste) the License ID that appears in the email you received from Event 1 Software with your license information.
7. Click **Next**, click **Online**, and click **Next** again
8. When the communication with the License Server completes, click **Next**
9. Confirm that the value in the **Status** column is “**Good**”
10. Click **Close** and then Restart Integrator

## **Step 4 - Create Connections**

You should create at least two connections:

- **Setup and Training**
  - Identify your copied Prolog Manager and Sage Timberline Office databases
- **Integrated Projects** (or a name of your choosing)
  - Identify your live Prolog Manager and Sage Timberline Office databases
  - After all configuration, training, and pilot-testing is complete, you may delete this connection and recreate it by copying the Setup and Training connection.

You may wish to (or need to) create additional connections if there is more than one Prolog Manager or Sage Timberline Office database being integrated.

To create a connection, click the **File** menu and click **New Connection**. Documentation about the steps of creating a connection can be found at:

[http://www.event1software.com/products/integrator/help/tools\\_filenewconnection.htm](http://www.event1software.com/products/integrator/help/tools_filenewconnection.htm)

Note - The first time a connection is created, Integrator will notify you that the Integrator database does not exist on the server yet and confirm that you wish to create it. Click Yes to proceed. This database will reside on the same server as your Prolog Manager database and will contain all of the configuration choices you make during your implementation process.

**Assuming that the above connections are successfully created and can connect to their respective databases, the installation is complete and you are ready for your first implementation session with a consultant!**