

# Installing the Is2 Onsite Version - HVAC Office System

This document describes the full onsite server installation of the Is2 database files, the database server, and the application server.

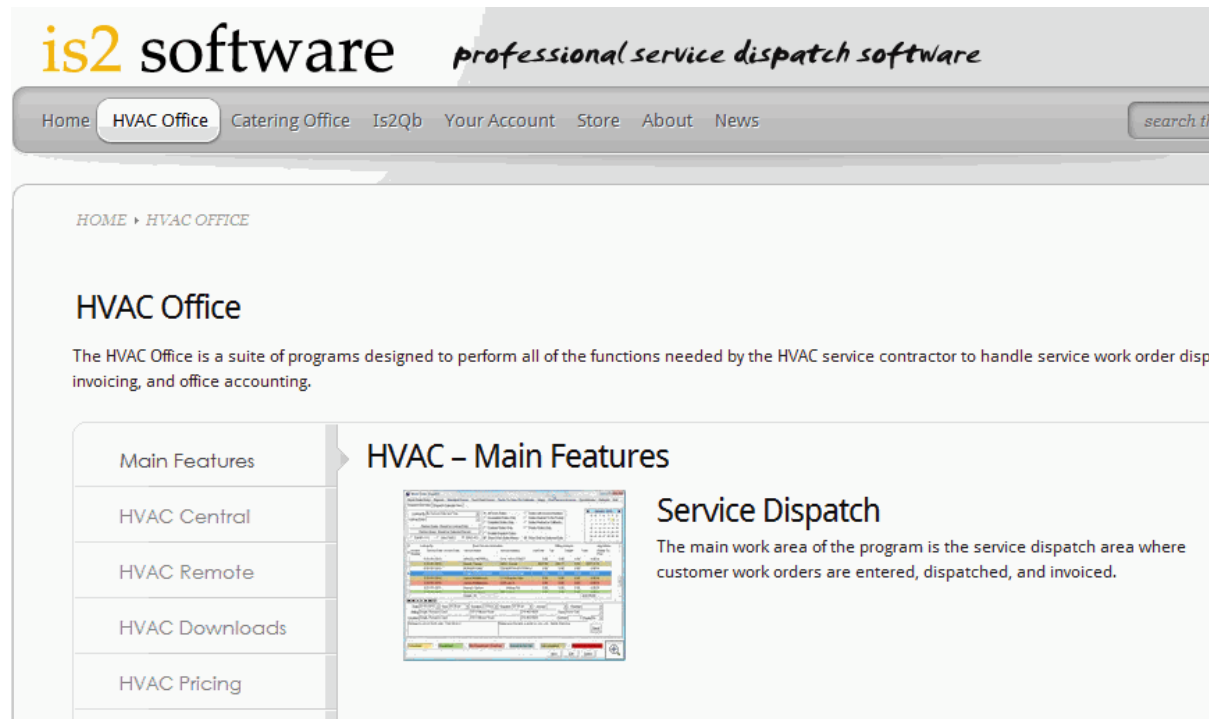
The full program installation consists of four downloads.

1. The HVAC Central Office program. This is the main dispatching and accounting program which the user sees.
2. The Application Server – runs as a service and handles communicates between the Central program and the database server.
3. The Database Server – this program which runs as a service on your main machine handles the database communications.
4. The HVAC company databases. The databases are where all data resides. Upon initial install, there will be a System and a Sample Company database. Usually, a new company database is then built to be used as the main company database, leaving the Sample database for training.

To download these files, go to this link:

<http://www.is2software.com/hvac-office>

You will be located on the HVAC Office Main Page. On the left side of the page, click on HVAC Downloads link.



The screenshot shows the website for is2 software, which is professional service dispatch software. The navigation menu includes Home, HVAC Office, Catering Office, Is2Qb, Your Account, Store, About, and News. The main content area is titled "HVAC Office" and describes it as a suite of programs for HVAC service contractors. A sidebar on the left lists "Main Features" including HVAC Central, HVAC Remote, HVAC Downloads, and HVAC Pricing. The main content area is titled "HVAC – Main Features" and includes a section for "Service Dispatch" with a screenshot of the software interface and a description: "The main work area of the program is the service dispatch area where customer work orders are entered, dispatched, and invoiced."

In the HVAC Downloads section, go to the HVAC Central Downloads area, and download and run the HVAC Onsite Install setup executable. Download the files listed to your local machine where the main installation will occur for the server operations.

determine if the programs fit your company's needs.

There is no time limit placed on the executables. The only limitation is that you will only be connecting with our datacenter in Dallas, Texas to the HVAC Sample company to access and store your data.

A word of caution. With your testing, you will be viewing and entering data that will also be viewed by other companies wishing to perform a trial test. So please do not enter sensitive data that you do not wish other companies to see.

HVAC Central Office Downloads	Version	
HVAC Central Office – Install	2011.8.9.1	Download
HVAC Central Office Update Program – Install	2009.9.10	Download
HVAC Central Office – Executable Only	2011.8.9.1	Download
HVAC Central Office Setup Manual		Download
<b>HVAC – Onsite – Full Install – Instructions</b>	2012.06.01	Download
<b>HVAC – Onsite – Full Install</b>	2012.06.01	Download

HVAC Remote Technician Downloads	Version	
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After running the Install Setup, you will have 4 setup executables extracted to your machine.

They should be located in the C:\Is2\Onsite Setup Files folder on your desktop or server machine.

The HVAC Central application program can reside on other desktops but the application server, database server, and databases must be installed on your main server or desktop which can be accessed thru your network or router by your other desktops.

The install should occur in the following steps:

1. Install the database files first. ( setup\_hvac\_databasefiles.exe )
2. Install the database server. ( setup\_sybase.exe )
3. Install the application server. ( setup\_applicationserver.exe )
4. Install the central office application. ( setup\_hvac\_central.exe ) ( if not already installed )

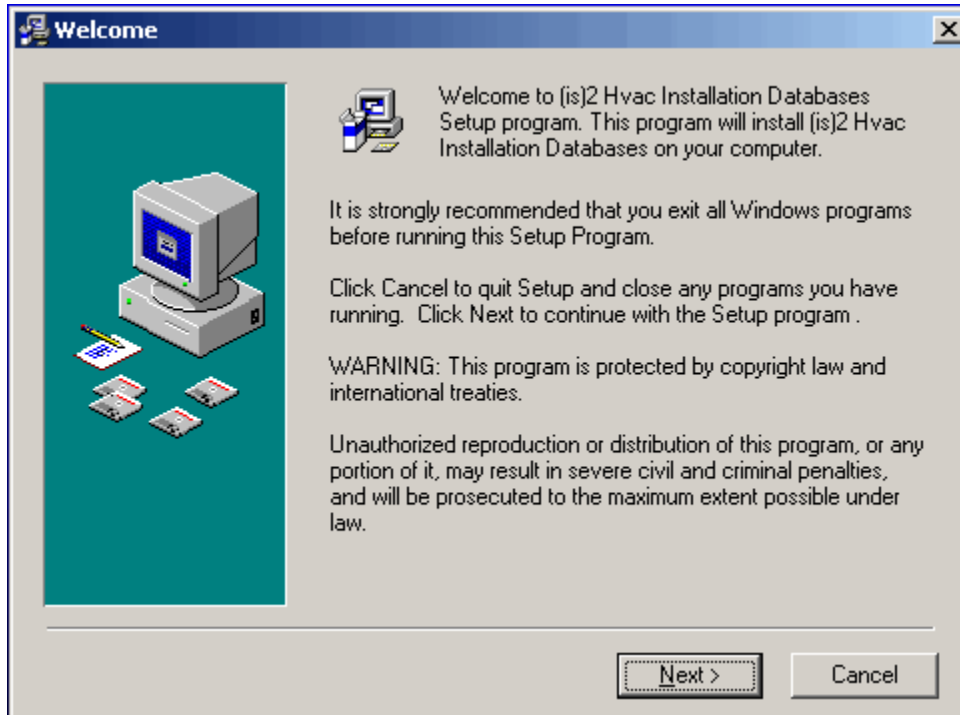
If problems arise during the install, the Is2 support team may ask to you use the Remote Control program ( TeamViewer ) that may be downloaded from [www.teamviewer.com](http://www.teamviewer.com) .

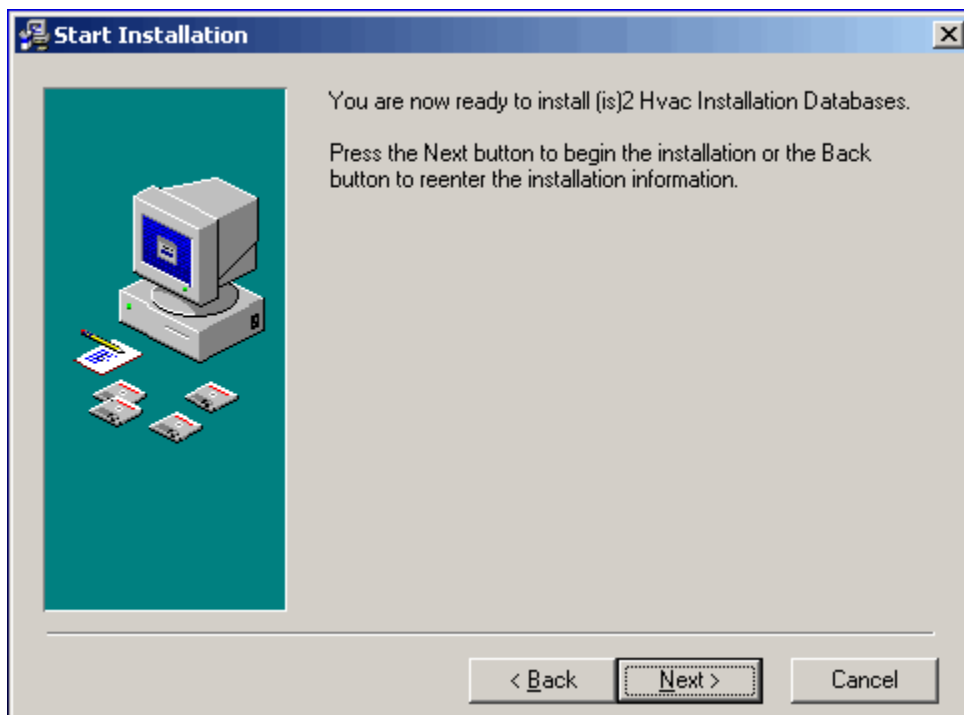
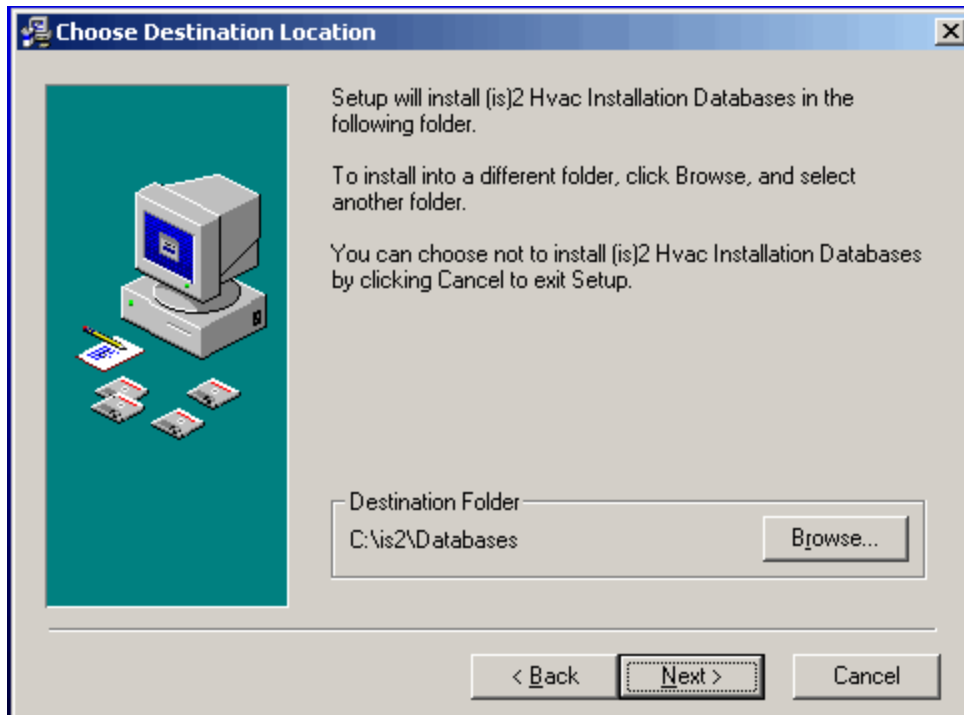
Again thank you for purchasing this Is2 Software product.

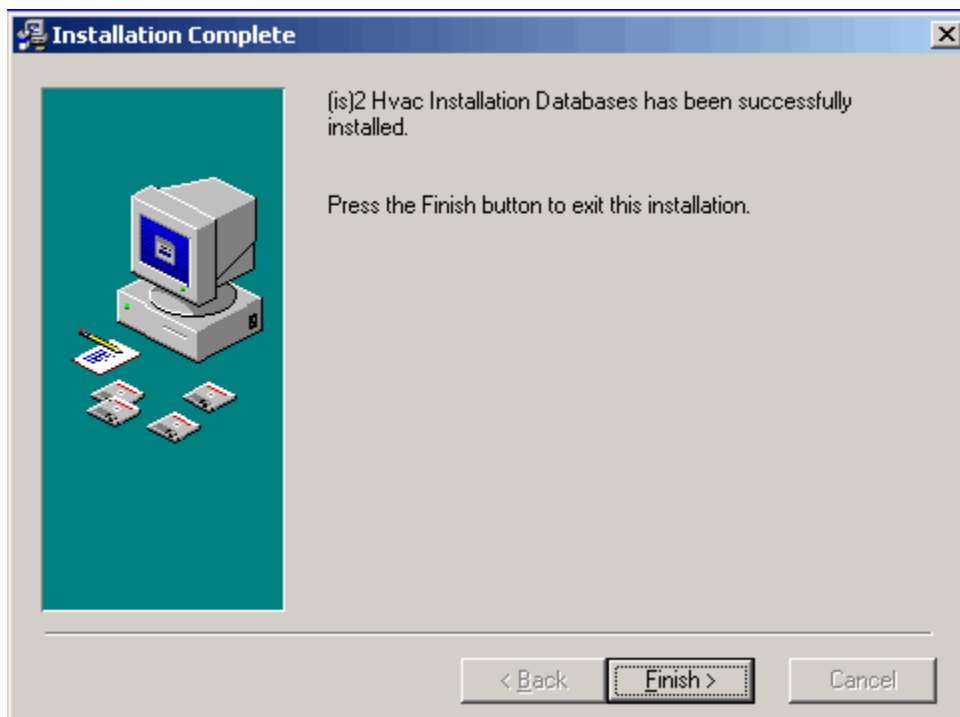
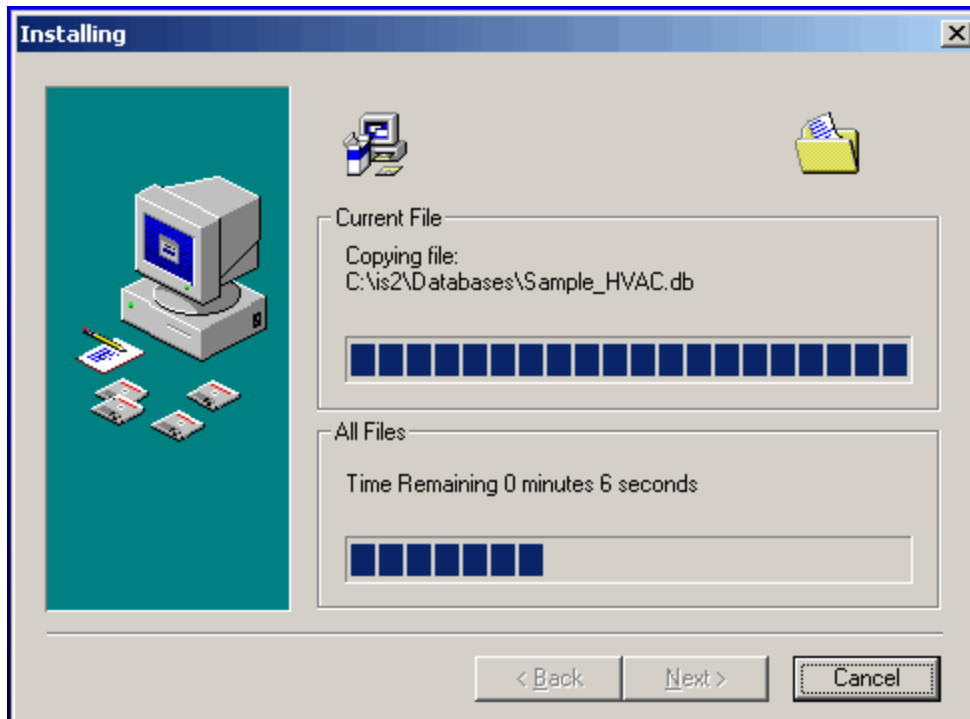
Thank you.  
The Is2 Support Team

## To install the setup database files:

1. Run the HVAC Database Files Setup after downloading.





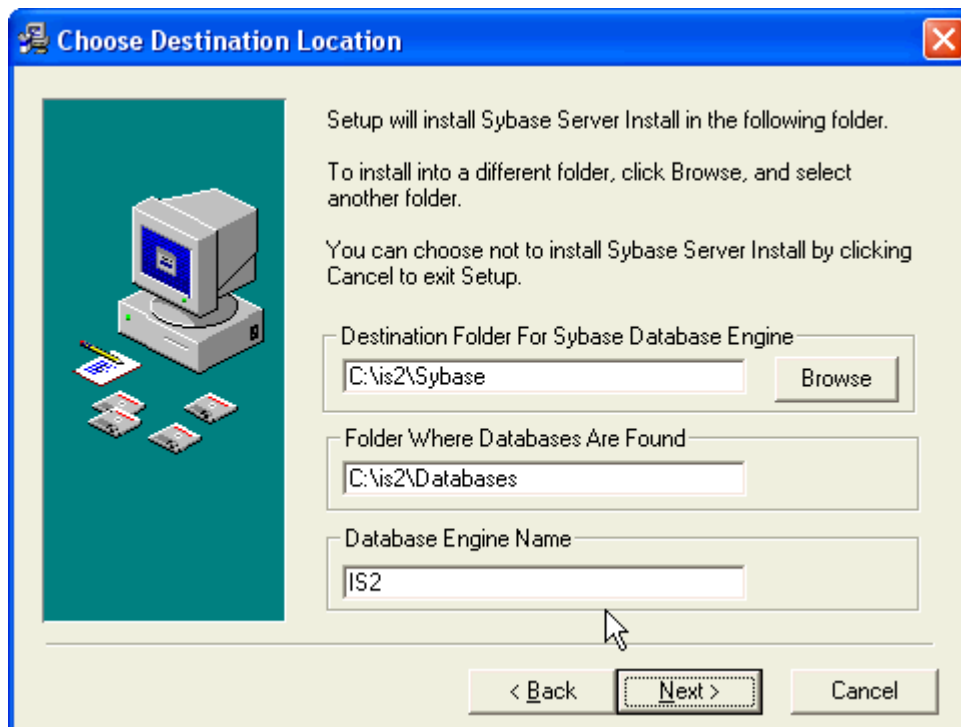
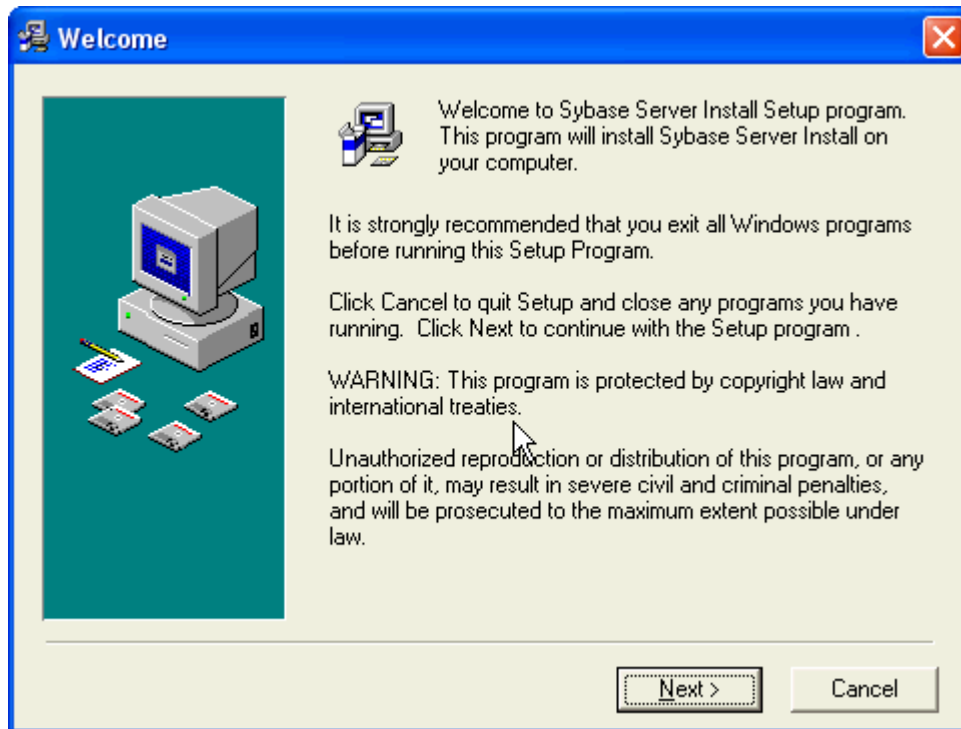


4. After installing the base database files, you are now ready to install the Sybase database server. There were two databases installed – the System database and the sample HVAC database. For production, you will create a new company database for your company or use one that has been created for you for the IS2 staff. If moving from the hosted environment, you will be sent your working database file for your company.

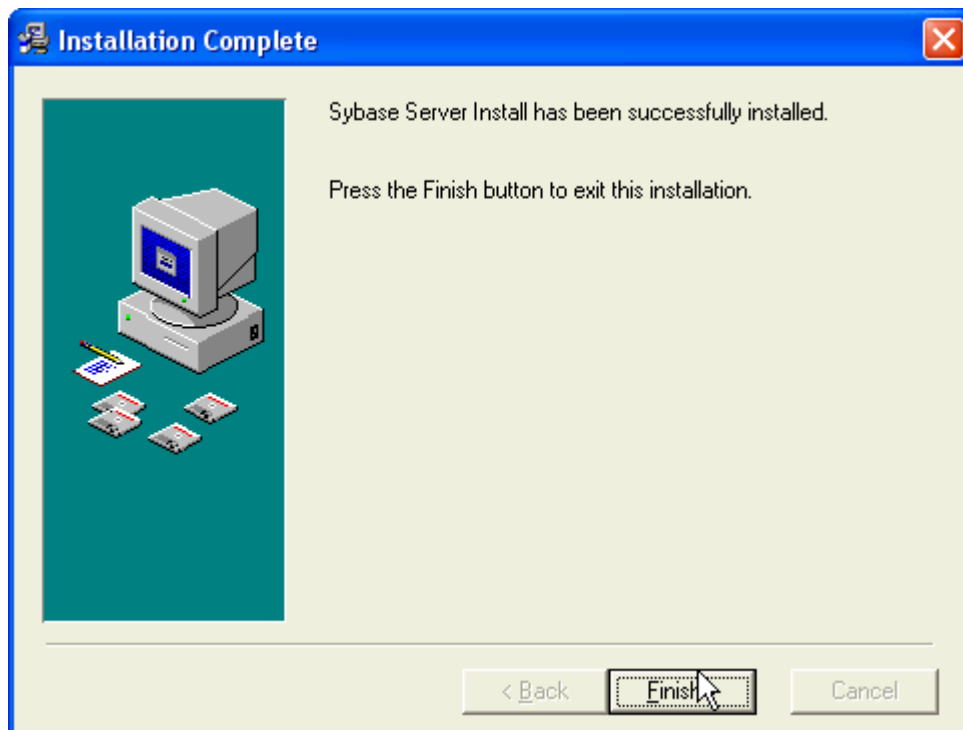
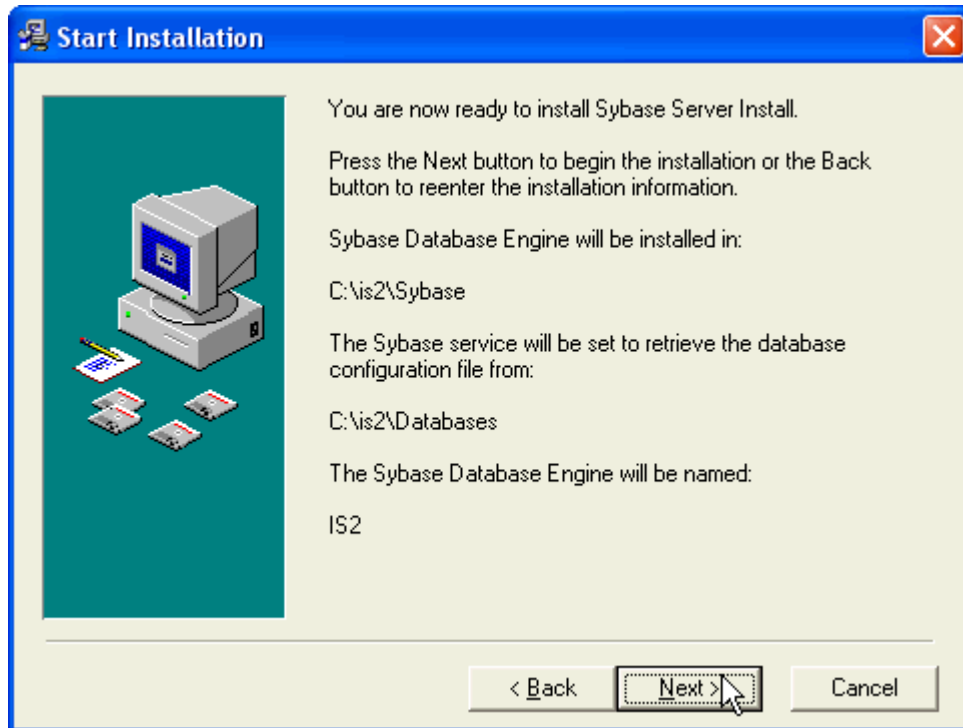
# Installing the Sybase Database Server

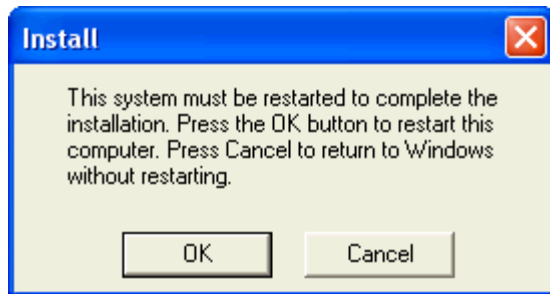
To install the Sybase Database Server engine:

Run the setup\_sybase program from where it was downloaded.

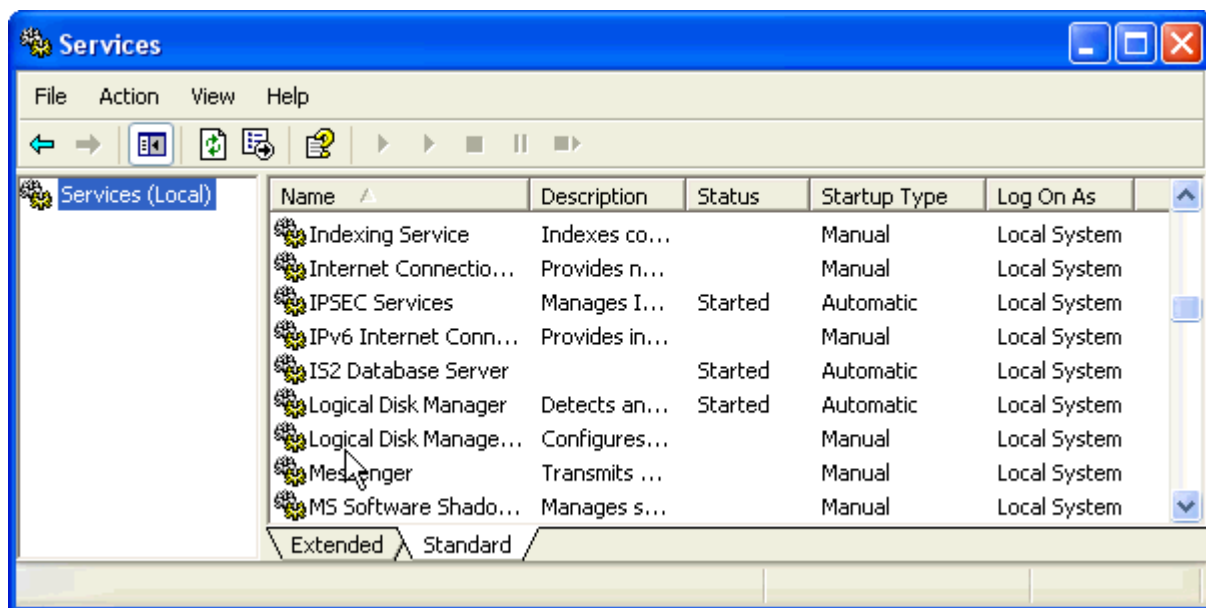


The engine name is defaulted to IS2. If multiple systems are installed on the SAME network, change the name of the database engine in order to be UNIQUE on the network.





Upon restarting the system, the database server will have started. This can be checked under the Services tab as the Is2\_Dbserver service. It should show started.

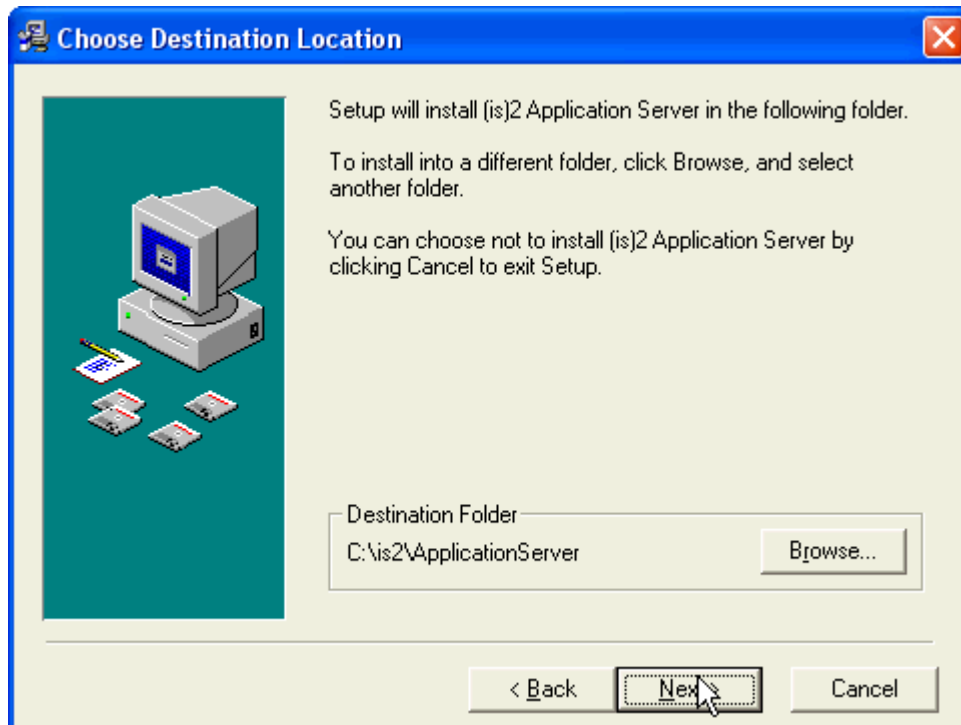
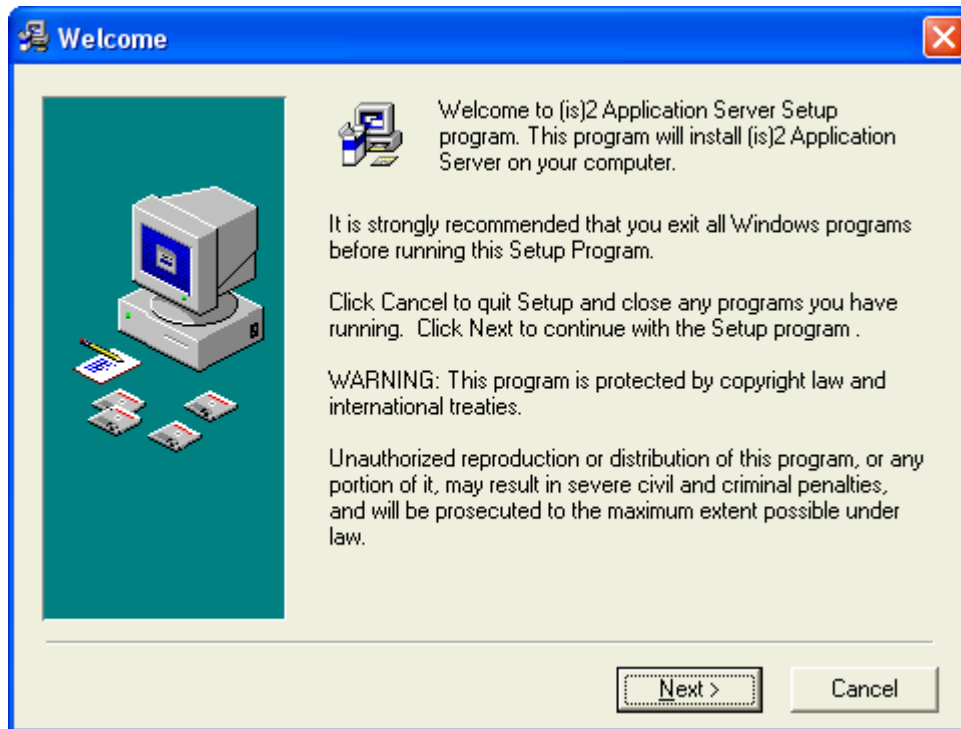


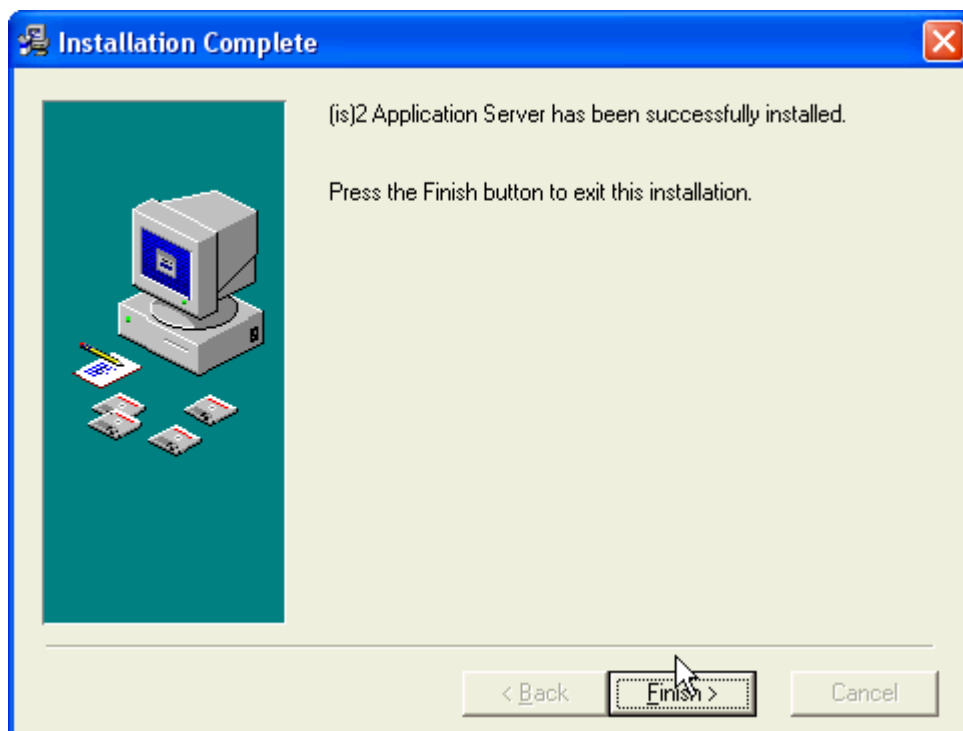
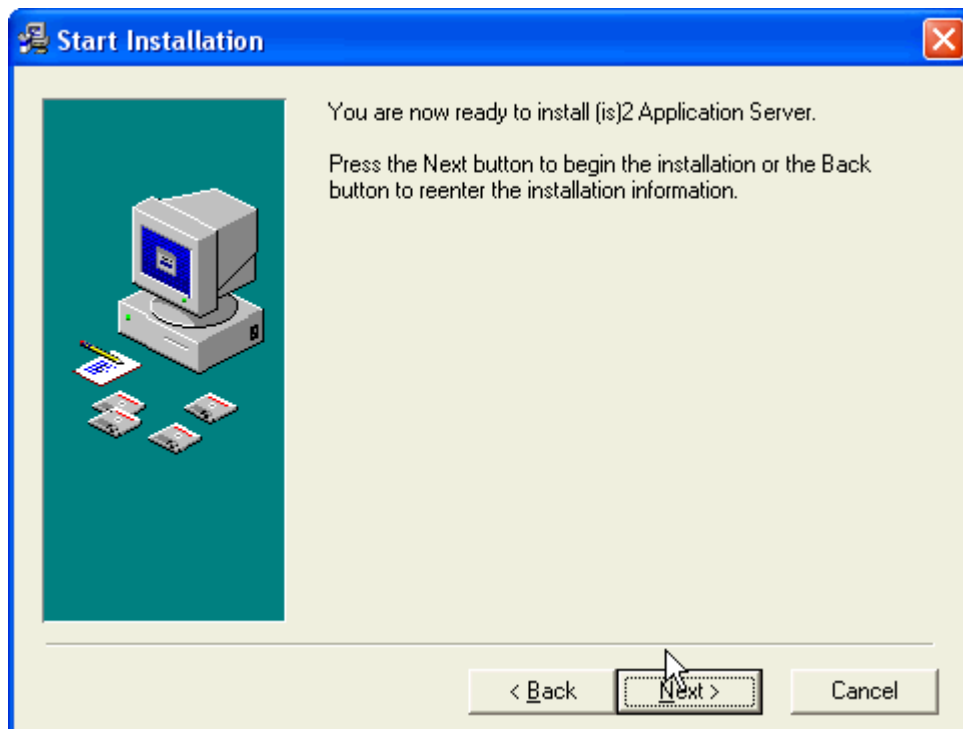


# Installing the IS2 Application Server.

**Note: The database engine must be installed prior to the application server.**

Run the **setup\_applicationserver.exe** program from where it was downloaded.

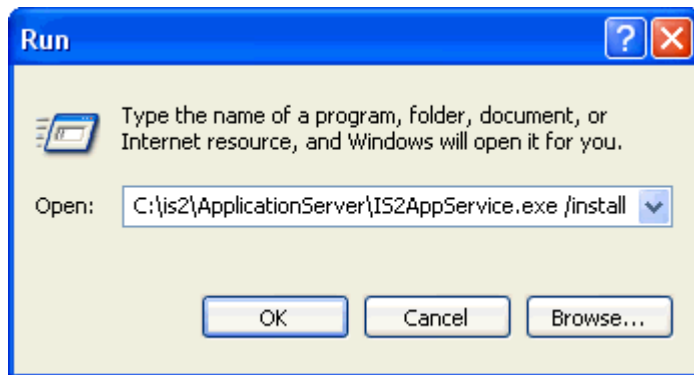




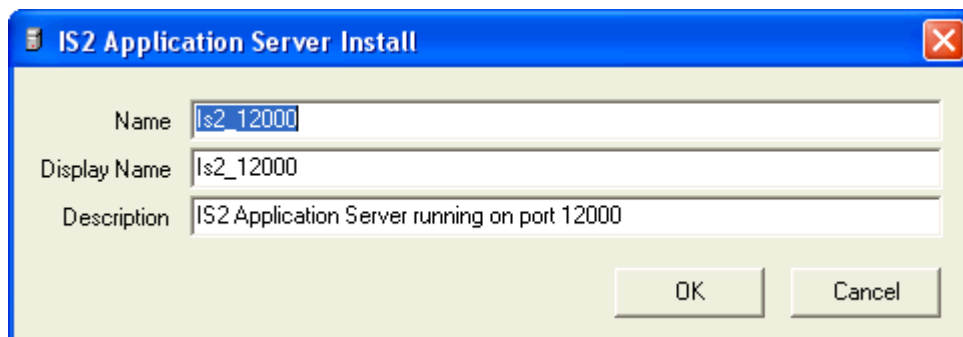
Once installed install the application server service by typing in

"C:\is2\ApplicationServer\Is2appservice.exe /install"

using the Command Prompt under Accessories or the Run dialog from the Start Button.



The application server install screen will appear. You may use the default values.



The application server configuration screen will appear. On this screen, add the IS2\_Dbserver under Dependencies by clicking on the green Dependencies checkmark. If the database engine name was changed, change the Engine Name.

The Is2\_Dbserver is the instance of the Sybase Database Server. If your database installation was not done with the Is2 Database Server installation setup, then the name may be

IS2 Application Server Configuration - Version 2003-09-18



Service Properties

Name **Is2\_12000**

Display Name

Description

Binary File

Load Order Group  Order within Group

Dependencies



Startup

- Automatic
- Manual
- Disabled

Error Control

- Ignore
- Normal
- Severe
- Critical

Database Properties

Version

User

Password

Engine Name

Server Params

Database

Client Params

Application Properties

Threading Model

- Single Session
- Pooled Sessions
- Persistent Sessions

Port

Compression

Encryption

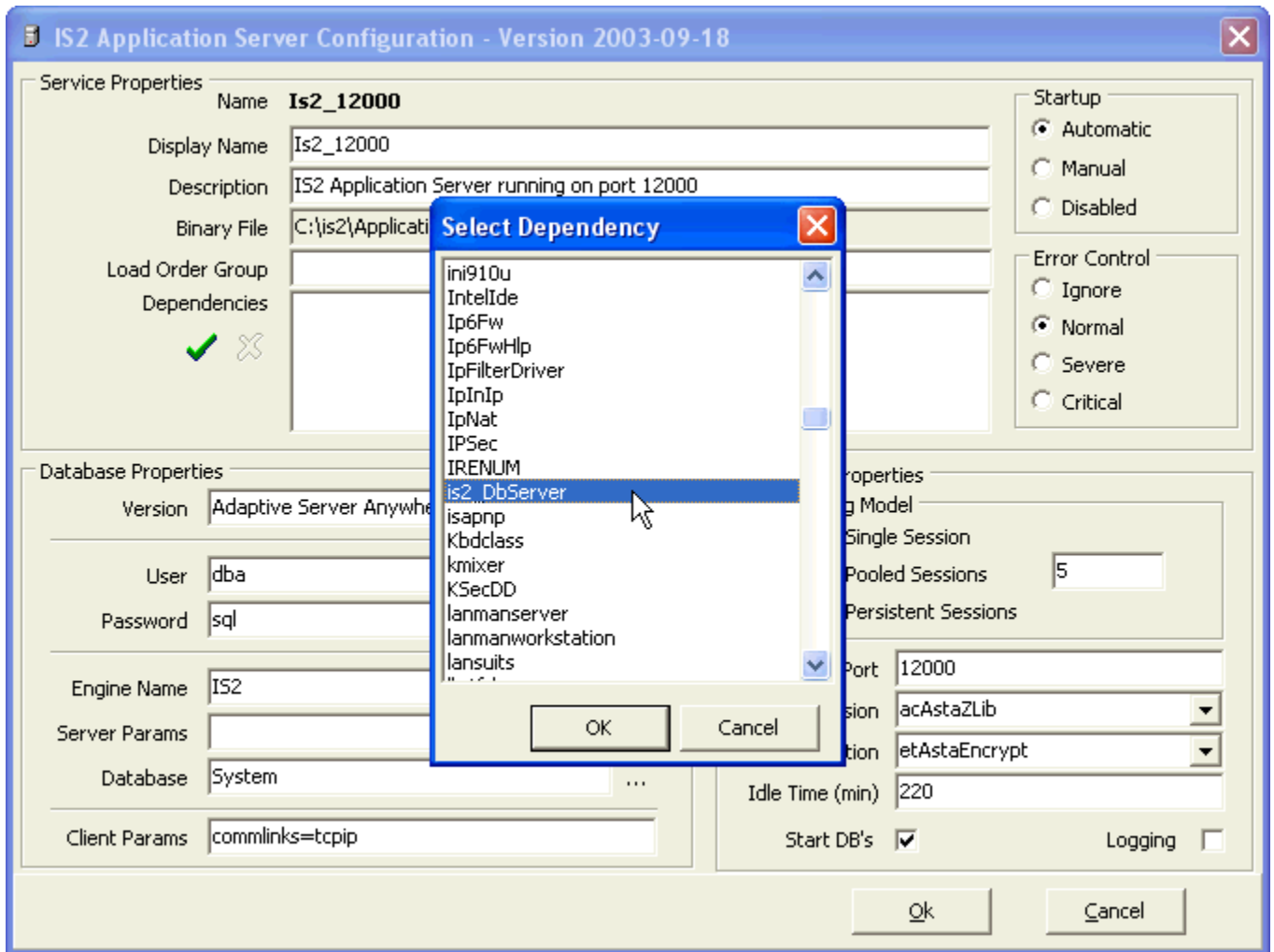
Idle Time (min)

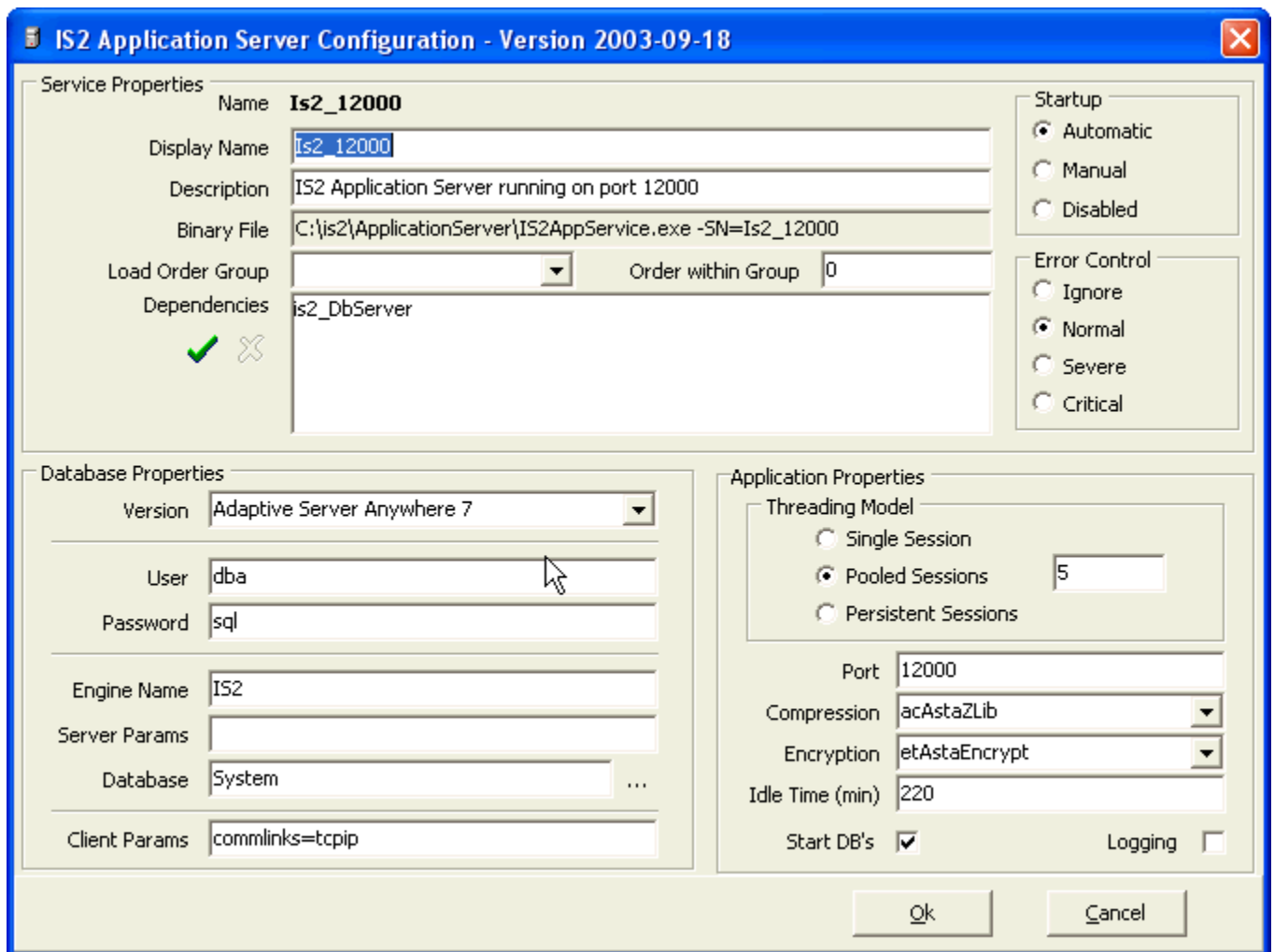
Start DB's

Logging

Ok

Cancel

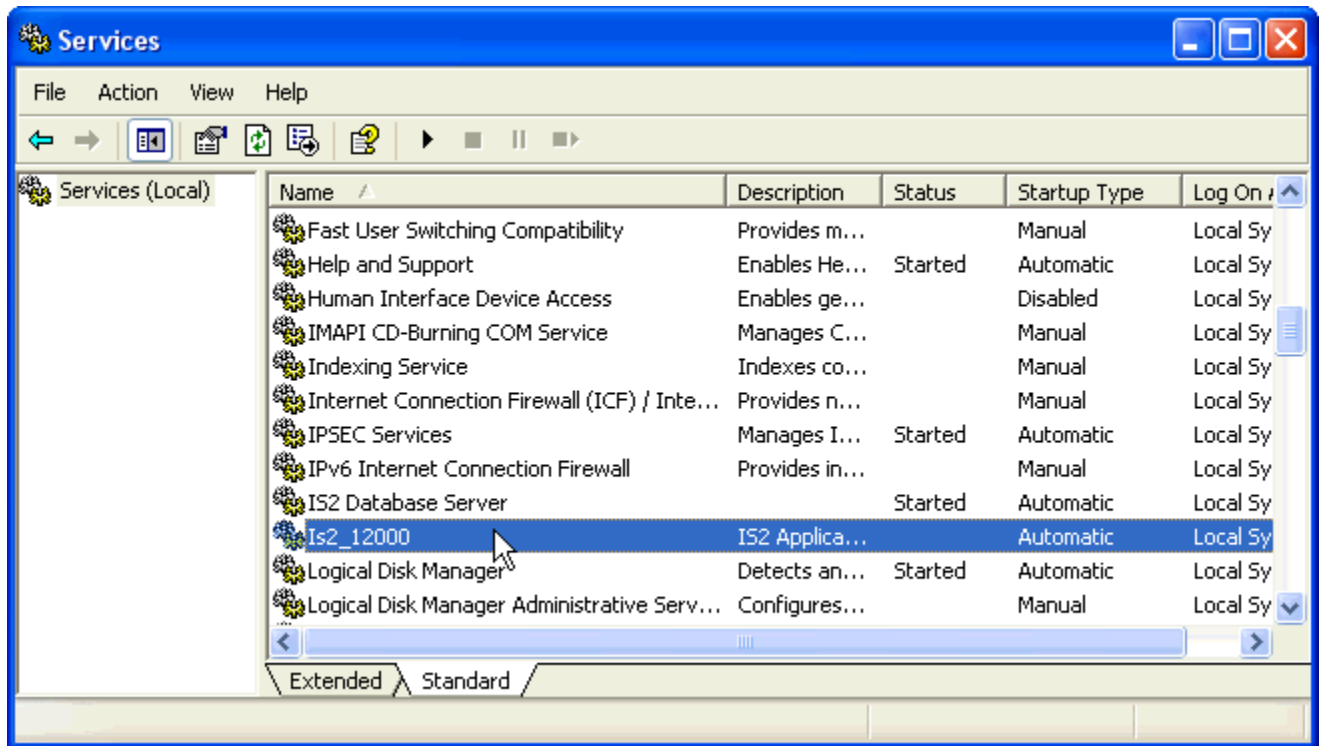




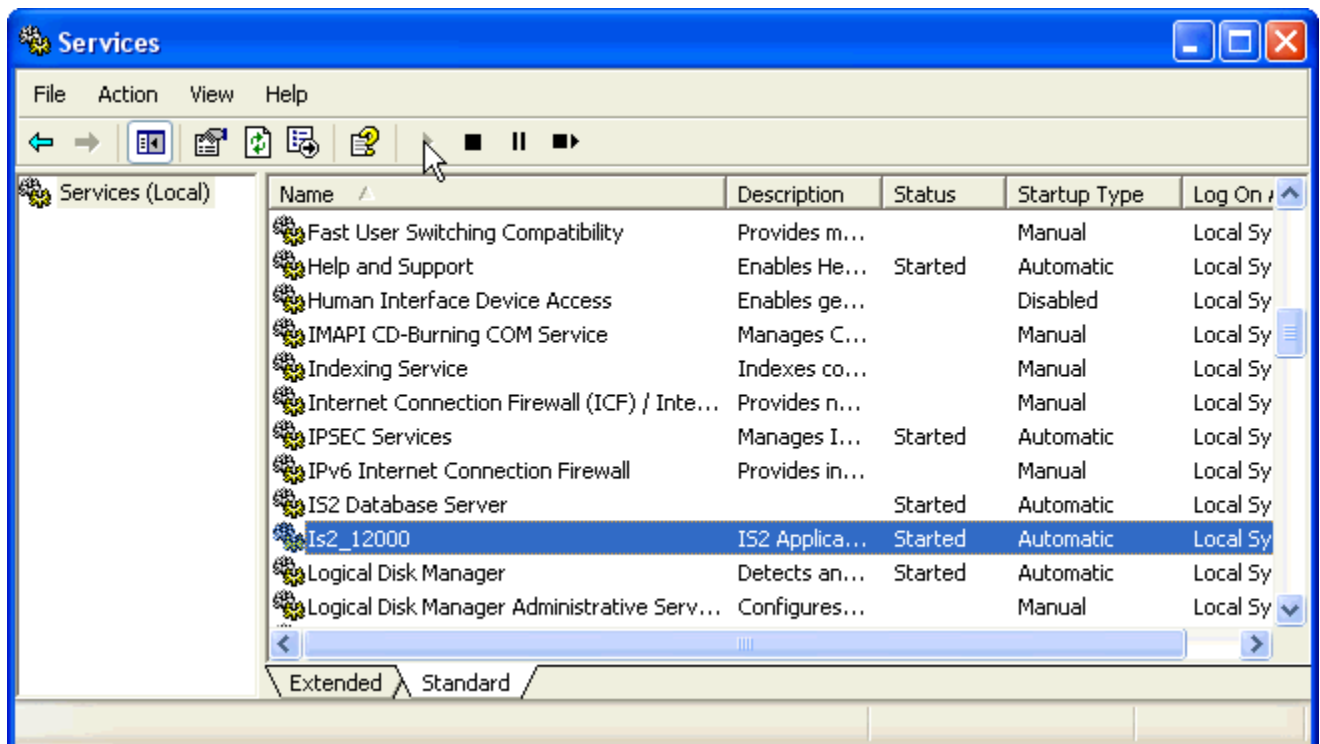
Make sure the is2\_Dbserver has been added to the Dependencies list and that your Engine name is correct. The configuration is defaulted to port 12000, 5 pooled sessions, and set to start automatically each time the computer reboots.

Click the Ok button to save the configuration.

Start the Application server service on your computer. This can be done by rebooting your computer or manual starting the service under the Control Panel | Administrative Tools | Services dialog.



Choose the is2\_12000 service and then click on the Start button to start the service.







**FYI: If you have already installed the Central Office application in a trial period, you do not have to reinstall.**

## **HVAC Central Office Program - How To Install**

Installing the HVAC Central Program

Follow these steps to install the program on your Windows computer. This consists of three parts.

1. The first process will be to download the setup file from the [www.is2software.com](http://www.is2software.com) website or from the links that were sent to you in your purchase email.

Download your file to a directory on your machine and please remember the directory in which you stored the setup file. A good practice is to setup a \Download directory on your machine for all downloads and create subdirectories for the different programs, etc. that are downloaded.

2. The second process will be to run the program setup executable ( Setup\_Hvac\_Central.exe ) on your workstation to install the software.

The application software will be installed on each workstation in your office. The Hvac Central program connects to either our hosted site or in your office to where your data is stored. If you are signed up for the hosted version, the program will attach to our application server here in Dallas, Texas. If you are running the onsite version, the program will attach to data stored on your own server, provided the database server and application server have been installed.

3. After installation, once you start the program a login screen will be presented. If you have purchased, you will be sent your login information by email.

**The base login parameters are:**

### **User Information**

User Name: **admin**

User Password: **admin**

Place checkmarks on both Save Passwords and Check for Update.

### **Connection Information**

Host Address: **is2software.net** ( or your server address if an onsite install )

Host Port: **12000**

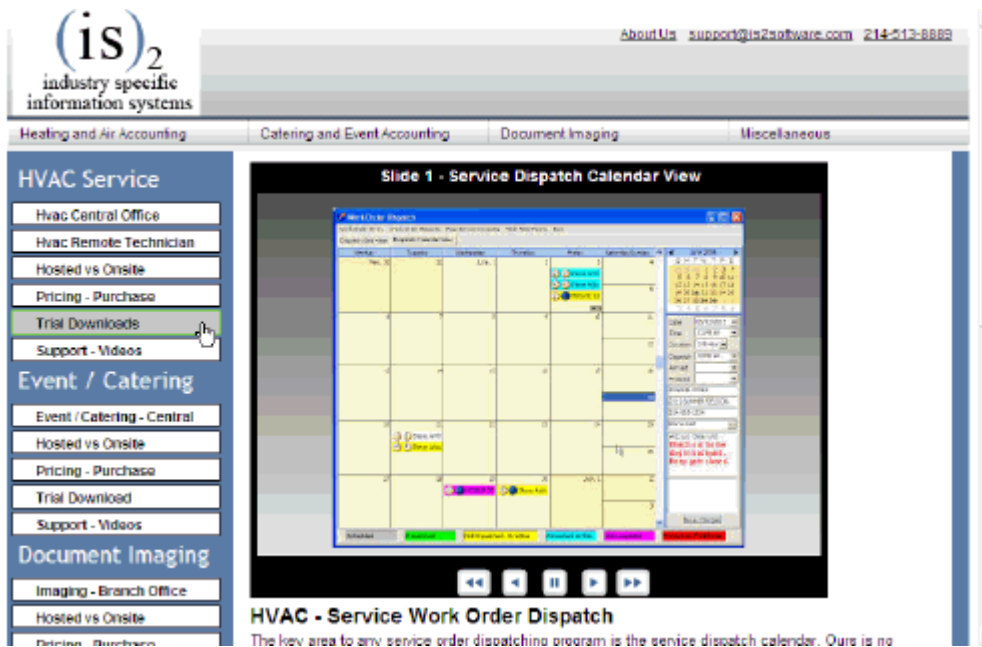
### **Company Information**

Leave fields blank. Make sure Hosted Account is unchecked.

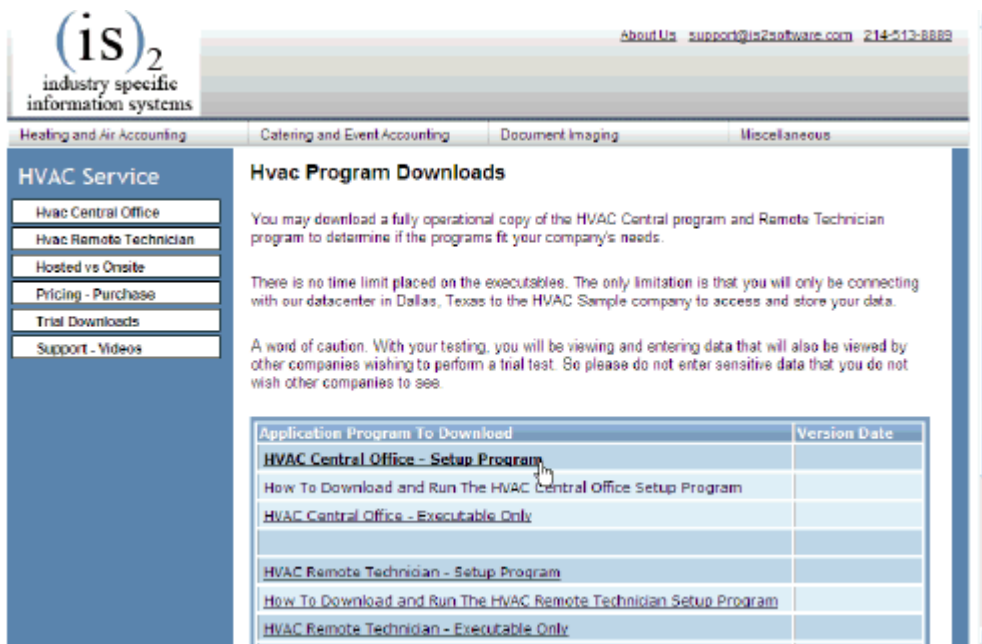
Updates for the program are periodically made available as modifications and additions to the program take place. An update availability screen is shown when first entering the program if a new update is available.

**To install the HVAC Central Office software:**

1. Download the HVAC Central setup program from the [www.is2software.com](http://www.is2software.com) website. At the homepage, choose the Hvac Service - Trial Downloads link on the left side of the home page.

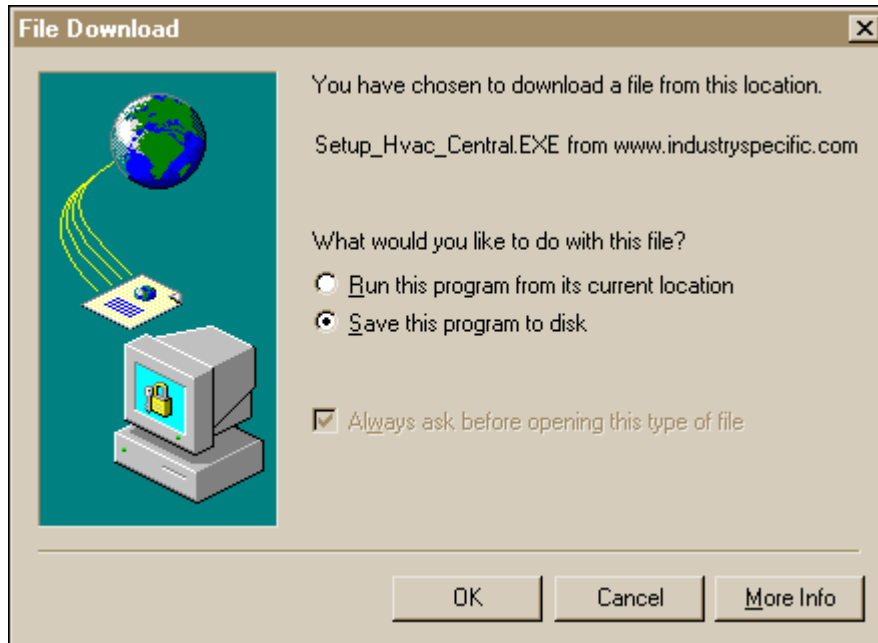


2. You will be directed to the Hvac Accounting downloads screen. Click on the Hvac Central Office - Setup Program link.

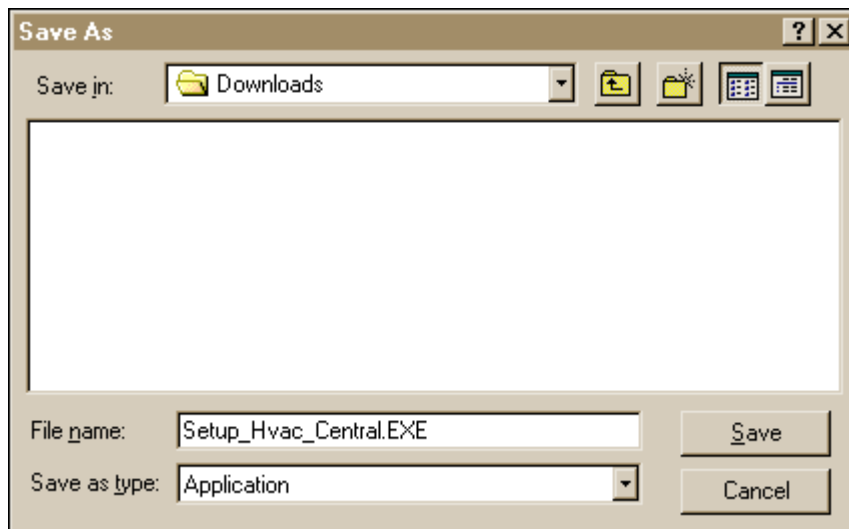


3. Choose the Save This Program to Disk option on the File Download dialog. Follow the onscreen directions to download the program setup file. The options shown are different between the multiple versions of Windows. Choose the Save option. Do not check the option to close the dialog box after the

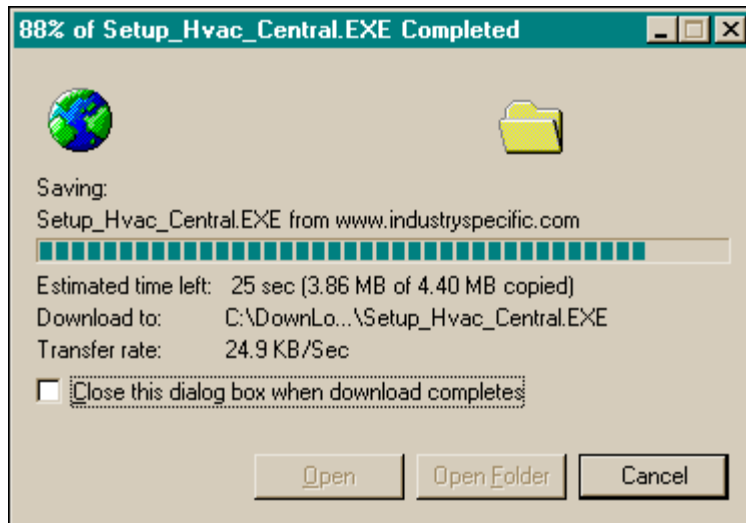
download completes if this option is available. If it is checked, you will not be able to continue without finding the downloaded file on your drive. Remember where you download the setup file. Best practice is to create a \Downloads directory on your Drive C or Drive D and download all install setup programs into that directory where you will know where to find them. Do not save setup files onto the computer desktop.



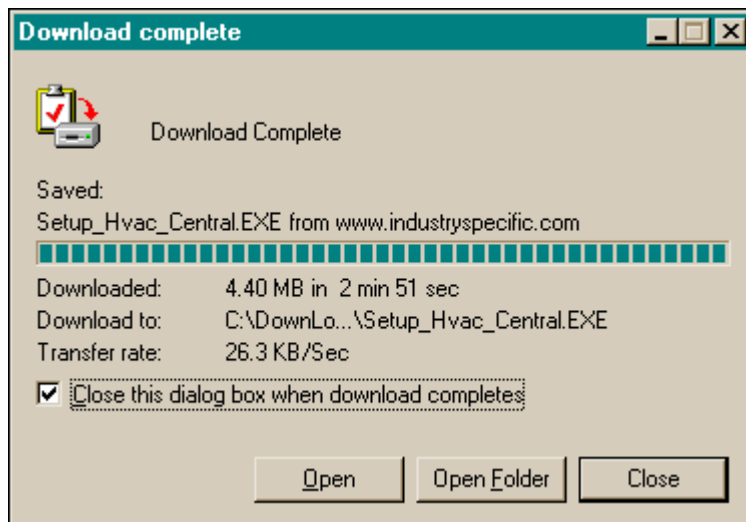
4. Save the file into a folder on your computer where you can find it. Example: C:\Downloads. You may have to create a new directory for your downloads.



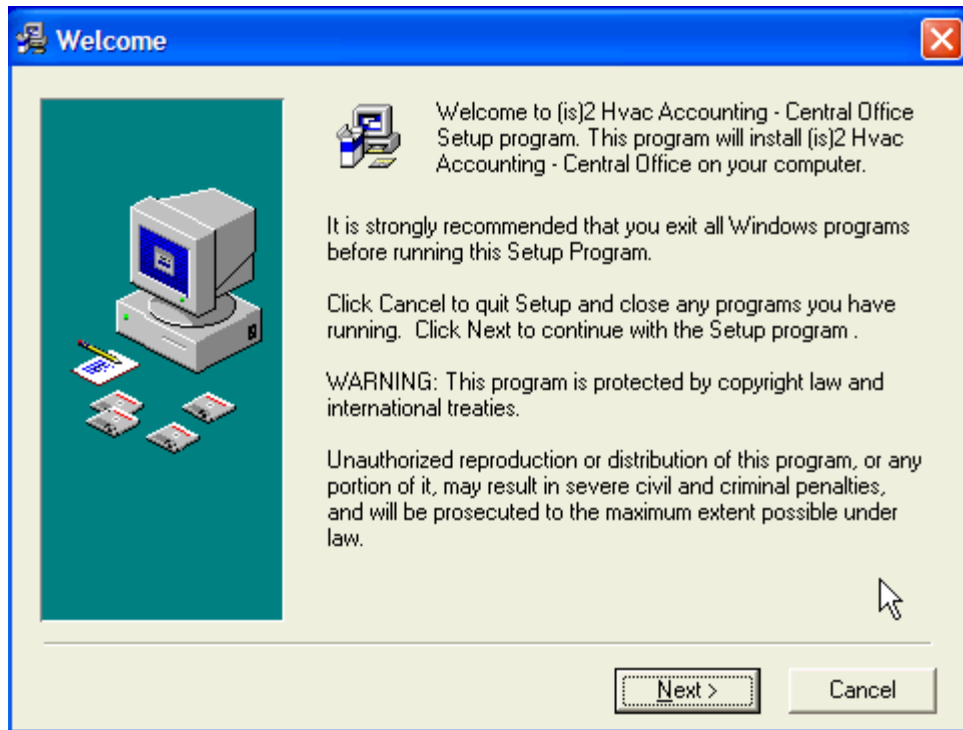
5. The transfer screen will show the progress of the file download. While transferring, make sure the "Close this dialog box when download completes" is not checked, if this dialog box shows on your screen. It makes the install simpler if you can run the setup program immediately after you download.



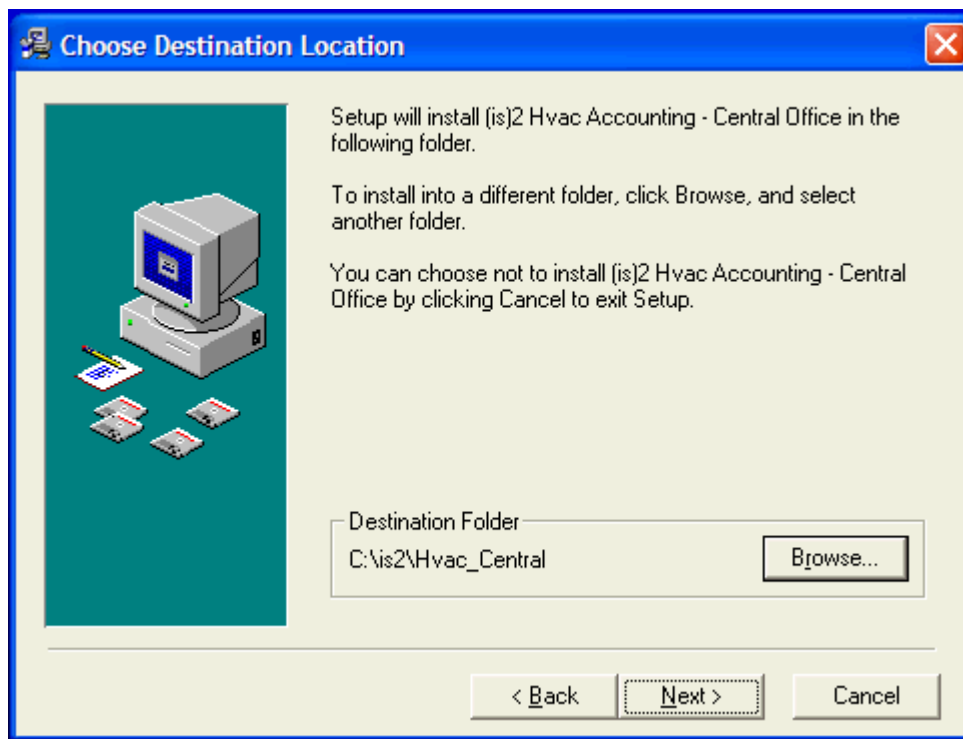
6. When the download is complete, click on the Open button to start the installation program. Some browser download dialogs do not show the Open button. If the Open button is not shown, remember where you downloaded the setup file, and then go to that directory to run the setup executable.



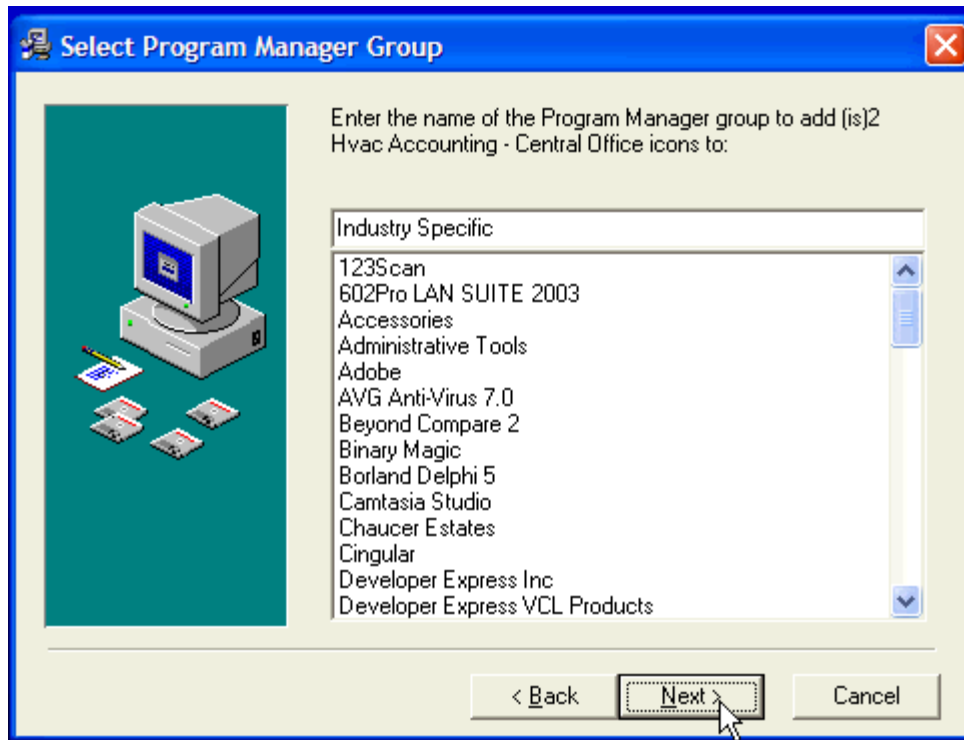
7. The install program will guide you along the software setup process.



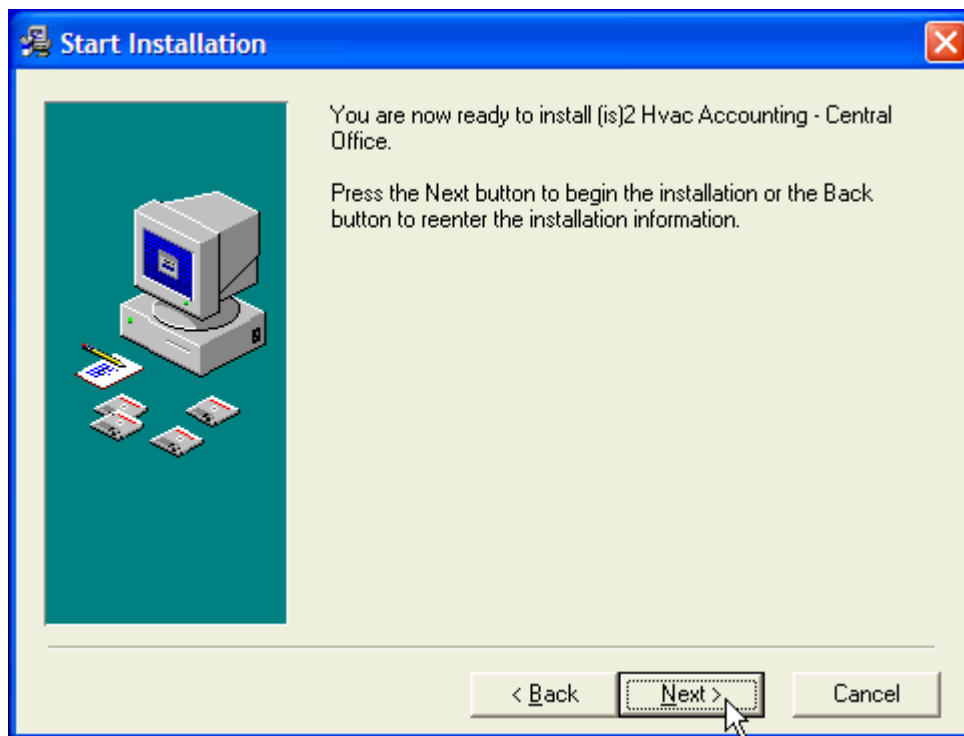
8. Choose where you wish the Hvac Central Office software to be installed. The default is "C:\is2\Hvac\_Central" directory.

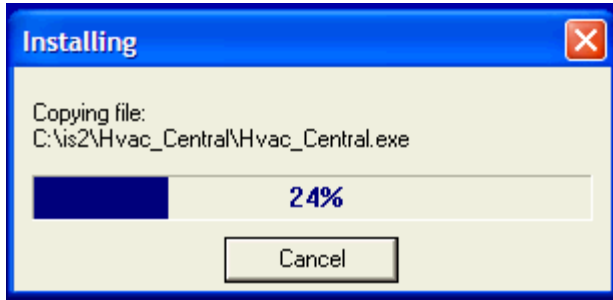


9. Now choose the Program Manager Group that you wish to find the Hvac program when you look under Programs off the Start button.

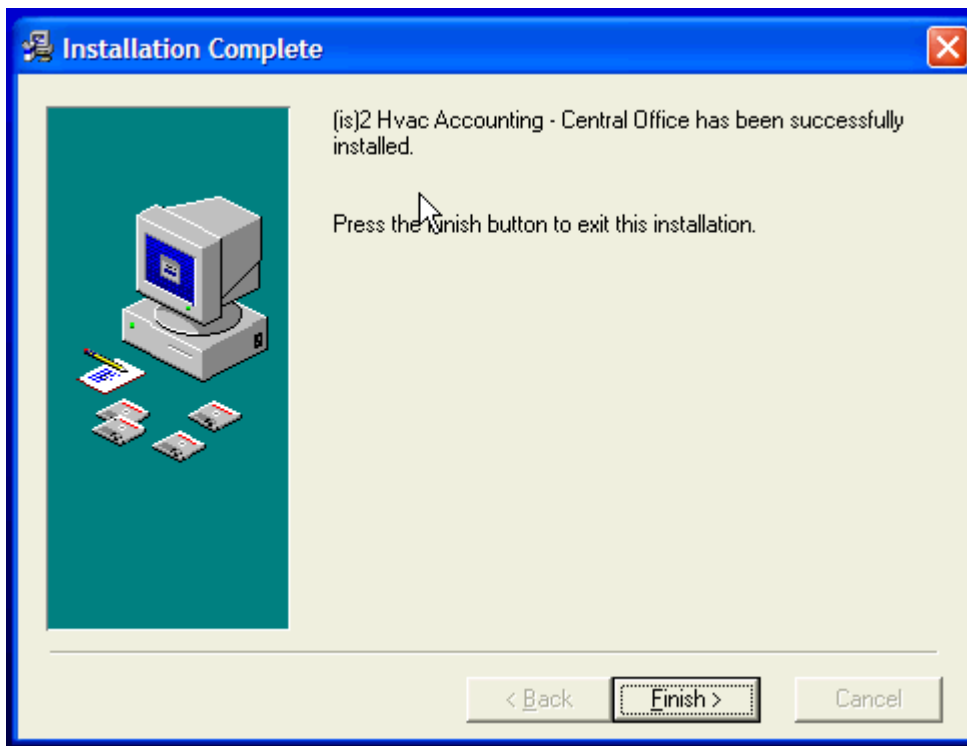


10. The files for the program will now be installed to the designated directory.





11. When finished, the system is ready for you to begin using.




12. From your computer's Start button, select the Programs menu, go to Industry Specific, and then choose the Hvac Central Office program. Or just choose the desktop shortcut that was created.



14. When the Hvac Central program starts, a login screen will appear. The first time you login, you will need to fill out the User Information and Connection information tabs. If you are a hosted client, then you will need to fill out the Company Information tab. This login information will be sent to you in a separate email after your purchase or hosting signup.

After your login information is filled in, click on the Ok button to save the login setup information and start the login process.

Log On to Hvac



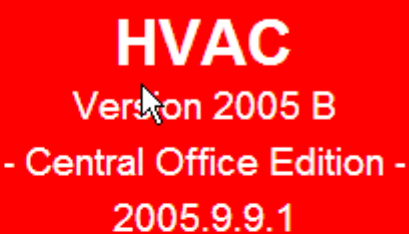
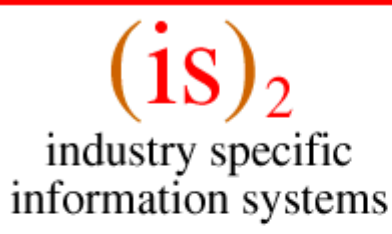
User Information | Connection Information | Company Information

User Name: hvacguest

User Password:  hvacguest

Save Passwords  Check For Update

Log On to Hvac

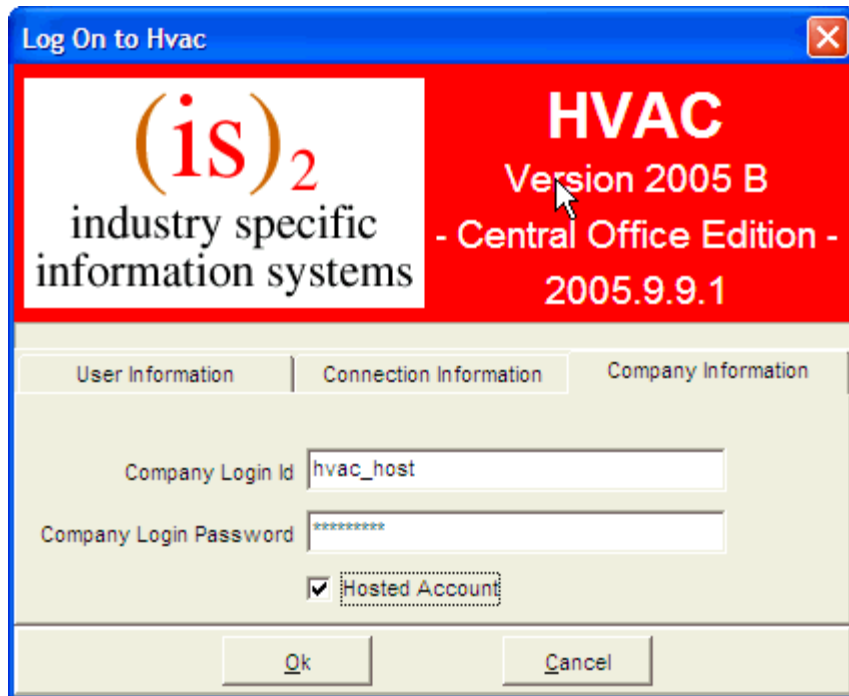


User Information | Connection Information | Company Information

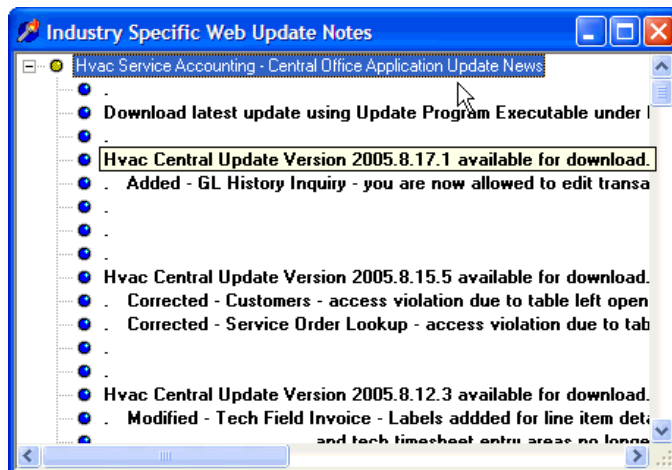
Host Address:

Host Port:

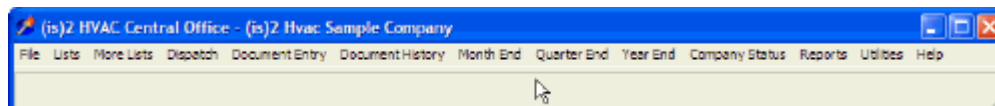




14. If an update is available for the application, then a update notification screen will appear. To do the actual updating of the executable, go to Update Program Executable under Help on the main menu after the program starts.



15. The main menu will appear for the Hvac Central program.



16. If the main menu appears, the program should be functioning properly.

# Database Files Installation

A sample set of the HVAC sample databases are available on the web server for download.

There are now three database files.

System - which has all login users and company menu rights for each user and login activity.

Sample\_Hvac - which has sample customers, vendors, employees, dispatch service orders, etc.

HVAC\_Setup - which is a base set of startup data such as chart of accounts, terms, customer types, etc that can be used to setup any new companies.

Instructions are below.

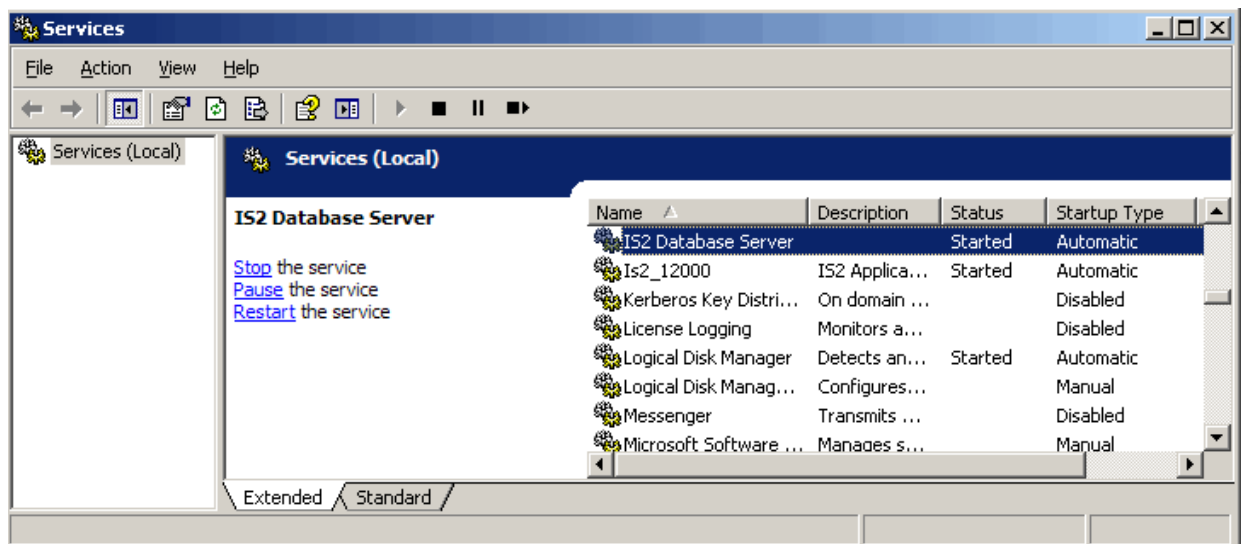
The base login to these sample database will be:

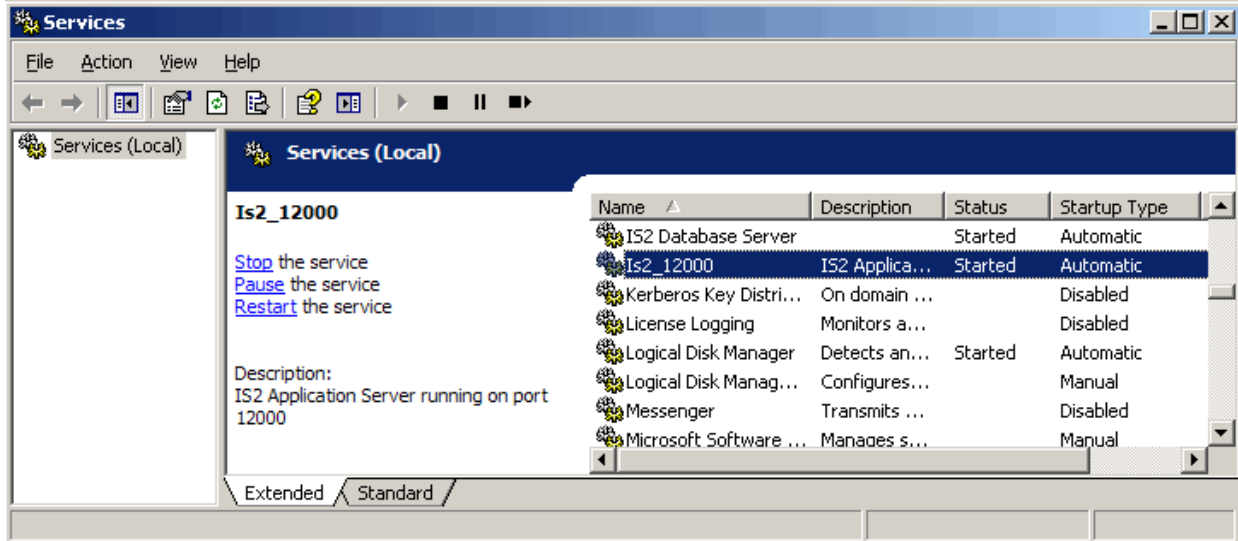
User Name: **admin**

User Password: **admin**

## To install this new set of database files:

1. First, you must stop the Is2\_12000 and Is2\_DbServer services on your server machine. Select the service and then click on the Stop button to stop each service. This will allow us to then overwrite the existing database files.



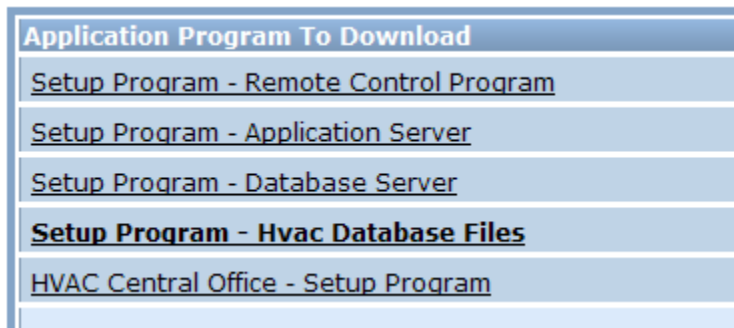


2. Now download the new setup file for the databases.

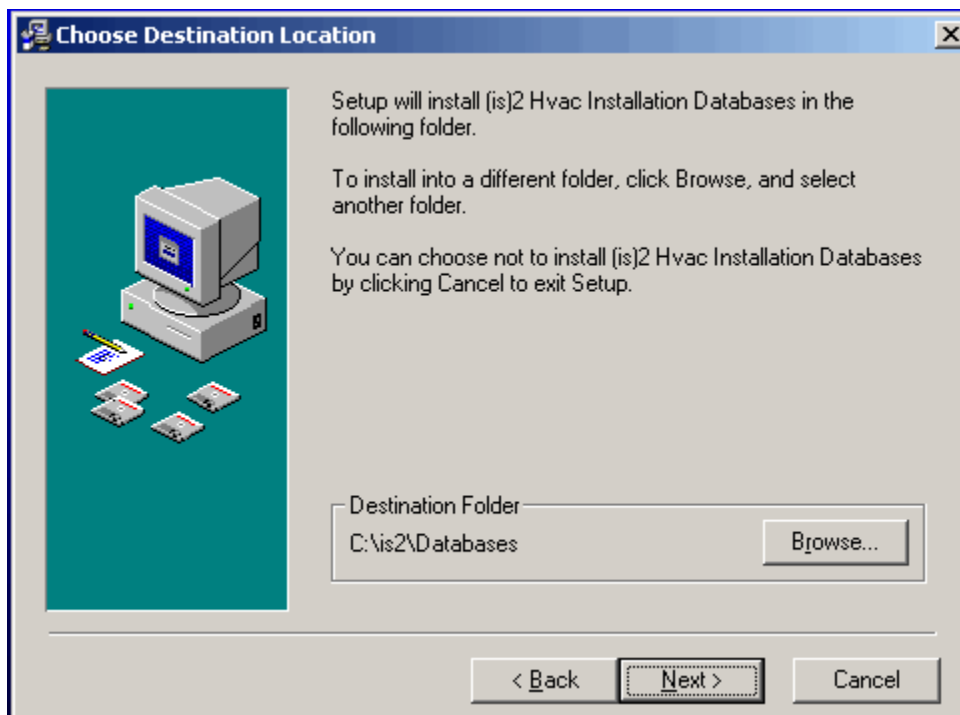
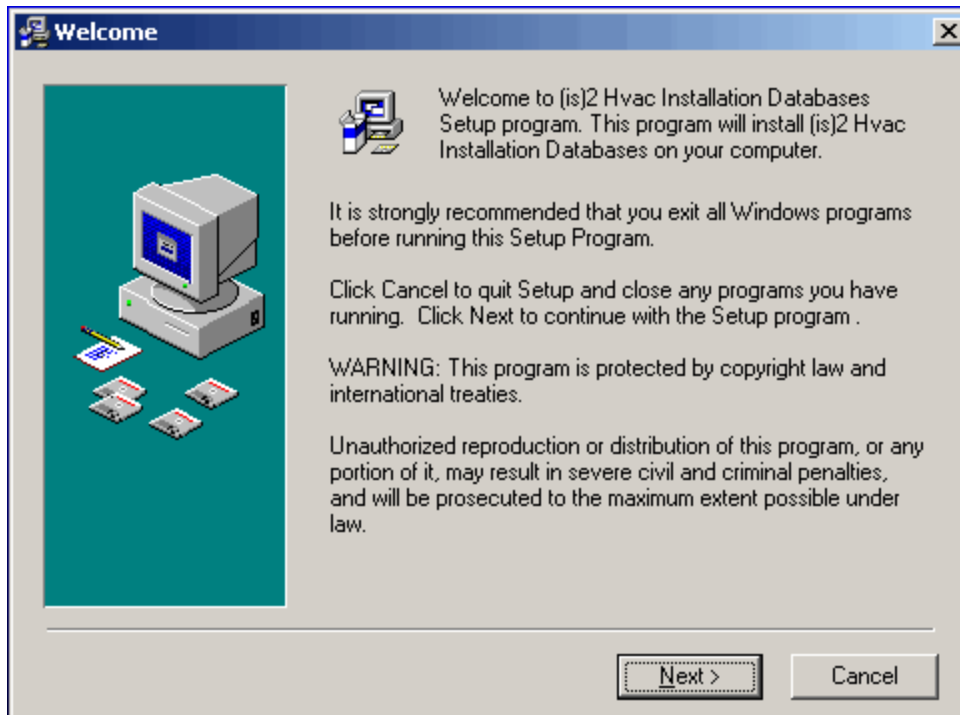
To download these files, go to this link:

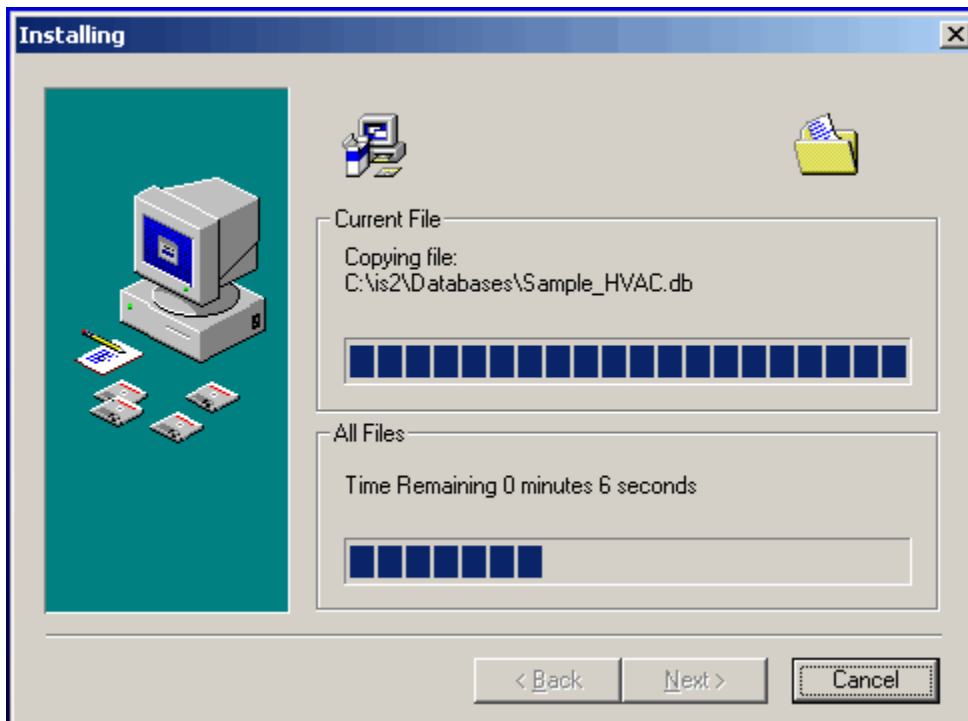
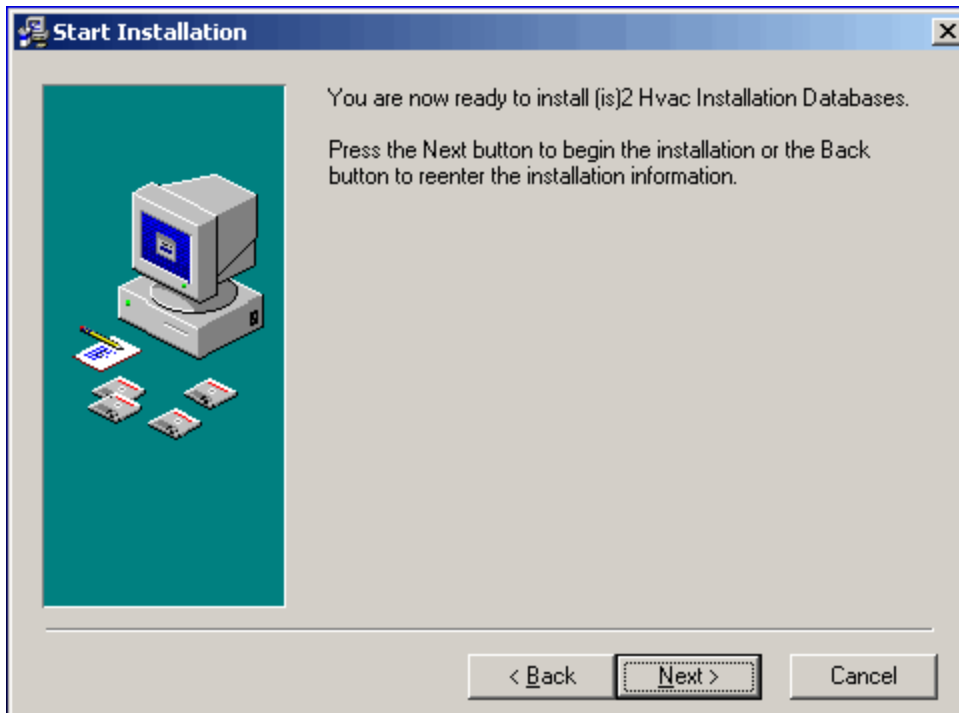
[http://www.is2software.com/hvac\\_install\\_downloads.shtml](http://www.is2software.com/hvac_install_downloads.shtml)

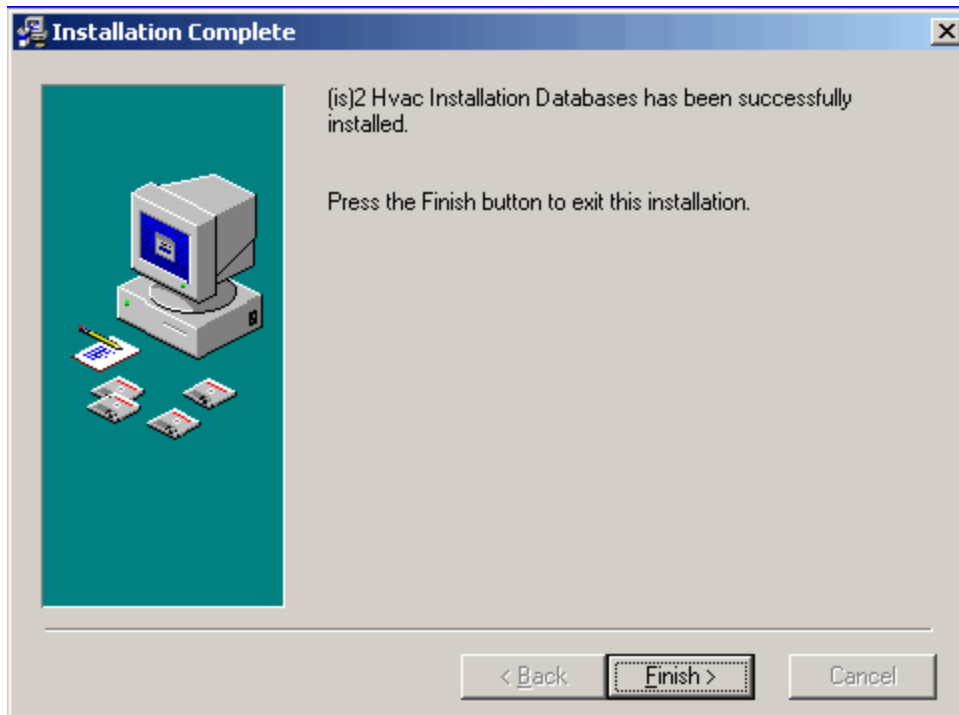
From the web page, download only the HVAC Database Files setup install.



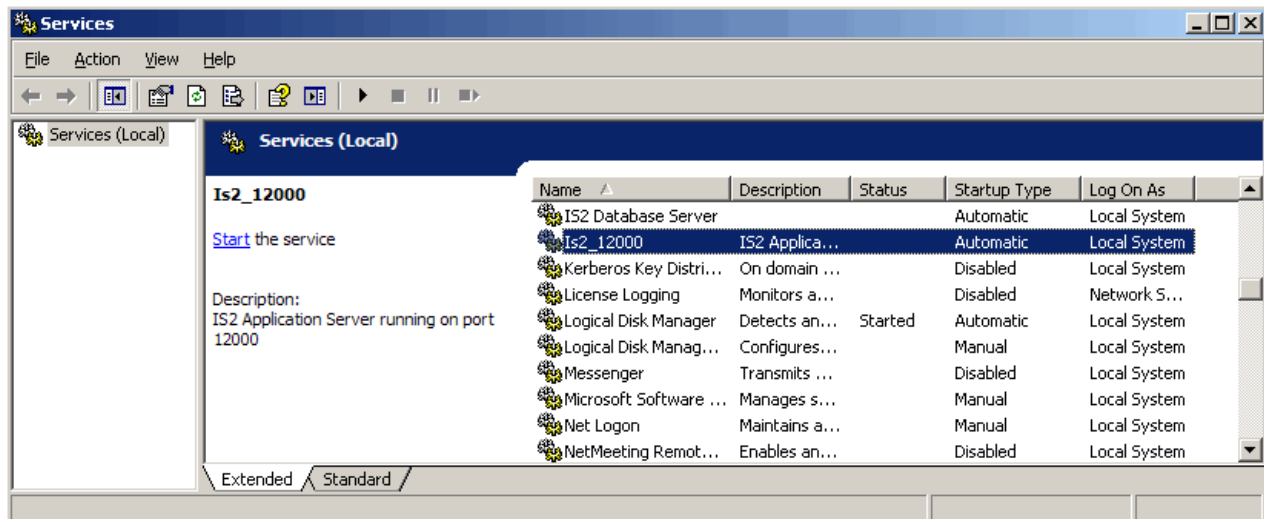
3. Run the HVAC Database Files Setup after downloading.

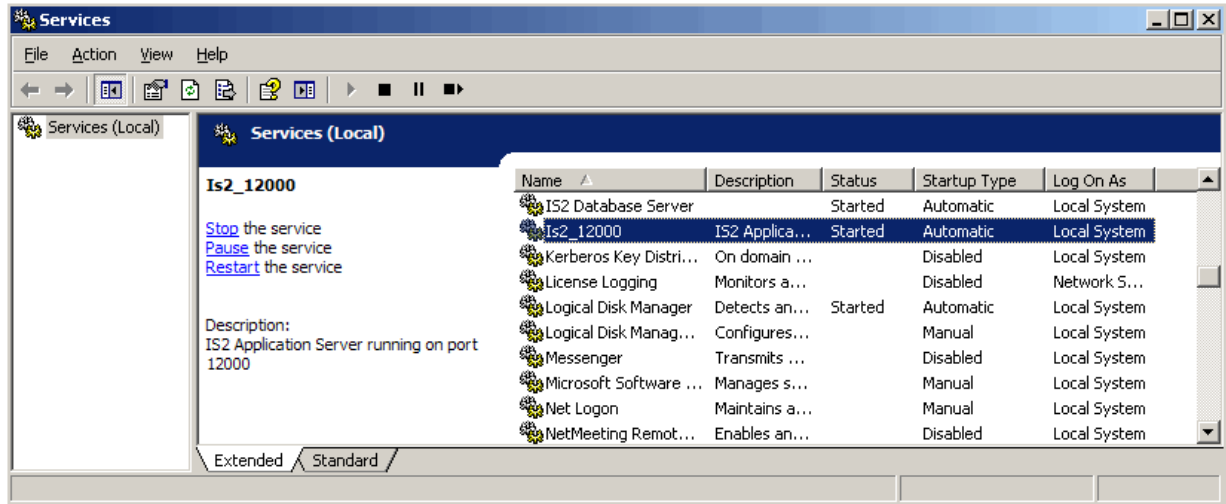






4. After installing the new database files, you must now restart the Is2\_12000 and Is2\_DbServer services to start the database operations again.





Both services will show started.

You are now ready to log into the HVAC Central program again.