

Instructions for Installation

Mitchell1

Mitchell1
Manager[™] **SE**

Mitchell1
ManagerPlus[™] **SE**



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Published in the USA

Chapter 1

Setup/Configuration

System Requirements

Before you begin installation, please make sure that the computer(s) you will be installing your Shop Management system software on meet(s) the minimum requirements below.

Minimum System Requirements

- 32-bit editions of Microsoft® Windows® XP SP3. 32 or 64-bit editions of Windows Vista™ SP2, Windows® 7 or Windows® 8
- Intel® Pentium® 4 CPU or equivalent
- Two Gigabytes (GB) Random Access Memory (RAM) is required for the computer running the Host/Server software. One Gigabyte RAM is required for any computer running only the Workstation software.
- 8 Gigabytes of available hard disk drive space
- 17" color monitor 1024 x 768 resolution
- Dual Layer DVD-ROM Drive
- Keyboard
- Mouse
- Inkjet printer or Laser Printer (Due to the large variety of printers available we cannot guarantee that every printer will be compatible with our software.)
- Internet Connectivity
- Internet Explorer® 8.0 or 9.0. (Note: IE 8.0 will automatically be installed if a supported browser is not present.)

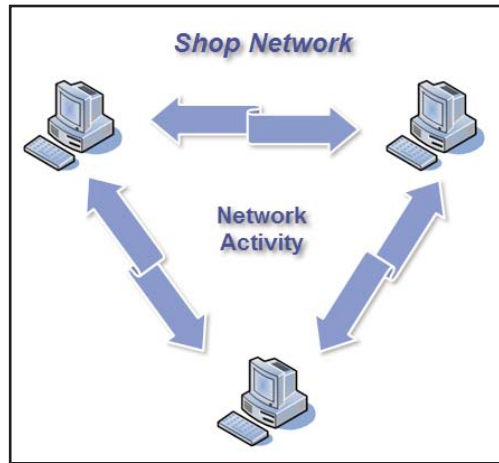
Optimum System Requirements

- 32-bit editions of Microsoft® Windows® XP SP3. 32 or 64-bit editions of Windows Vista™ SP2, Windows® 7 or Windows® 8
- Intel® Pentium® 4 CPU or equivalent
- More than two Gigabytes (GB) Random Access Memory (RAM) is highly recommended on the computer running the Host/Server software in a multi-computer environment. RAM may need to be increased on the Host/Server as the number of connected Workstations increases. Performance may be gained on individual Workstations as the RAM is increased above one gigabyte.
- 80 Gigabytes available hard disk drive space
- 19" color monitor 1280 x 1024 resolution
- Dual Layer DVD-ROM Drive
- Keyboard
- Mouse
- Sound Card and speakers (For training videos)
- Inkjet or Laser printer (Due to the large variety of printers available we cannot guarantee that every printer will be compatible with our software.)
- 2 GB USB Thumb Drive, Flash Drive or similar device to store daily database backups (USB memory drive must be configured with a logical drive letter.)
- A UPS (Un-interruptible Power Supply) is highly recommended.
- Broadband Internet Connection
- Internet Explorer® 9.0.

Networking Requirements

Network connectivity is required if you will be using your Shop Management system on multiple computers. For network setups with access to the internet, a commercial firewall and antivirus application is highly recommended. We also recommend the services of a professional network administrator in configuring your network environment.

- 32-bit editions of Microsoft® Windows® XP SP3. 32 or 64-bit editions of Windows Vista™ SP2, Windows® 7 or Windows® 8
- Commercial Grade 100 MB/sec or faster Network Card
- TCP/IP network protocol
- Wireless connectivity is supported using 802.11g or faster
- 5 or more concurrent users should consider a dedicated computer to host the database. Network domains are not supported.



Disclaimer: The minimum requirements listed above apply to the current set of applications. These requirements may not be compatible with future software releases.

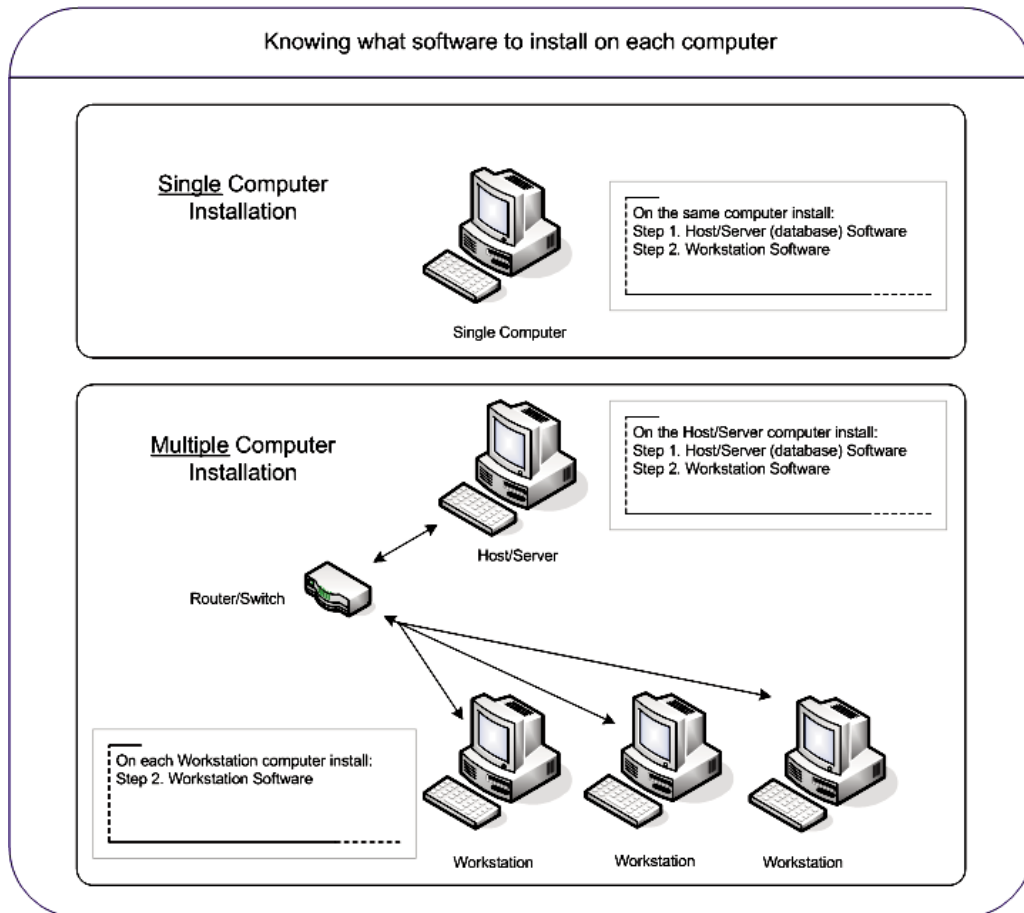
Quick Instructions for Installing Your Shop Management System Software

You may follow the quick instructions below to install your Shop Management system software on a single computer, or multiple computers, depending on your setup. If you would prefer step-by-step instructions please see the following section: "Detailed Instructions for Installing Your Shop Management System Software"

The Shop Management system software consists of two separate components:

- First is the Host/Server software component. This is the database software which will store all of your Customer Data, Repair Order History, etc.
- Second is the Workstation software component. The workstation software is essentially your window into the database and is what you will see on your computer monitor.

You will be installing these same two software components regardless of whether you are installing on a single computer, or if you are installing on multiple computers. What does change based on your setup is which of these two software components will be installed on each computer.



NOTE: If you are already a Shop Management system user, it is important to backup your existing Shop Management system database before installing this software. This is a critical step to avoid possible data loss in the event that the installation fails or is interrupted. The database migration during the upgrade process may take hours depending on the size of your existing database and the speed of your computer.



Quick Instructions for installing on a Single Computer

Step 1. First, insert the installation disc into your computer. Install the host/server (database) software by selecting the “Host/Server Installation” button.

Step 2. Second, install the workstation software on the same computer by selecting the “Workstation Installation” button.

NOTE: If the installation screen fails to appear (autorun) when you insert the disc into your computer, you can start the installation menu by browsing your DVD-ROM Drive and selecting the Autorun.exe file.

Quick Instructions for installing on Multiple Computers

Step 1. First, insert the installation disc into your host/server computer. Install the host/server (database) software on only the host/server computer by selecting the “Host/Server Installation” button. For best performance, the computer you choose to act as your host/server should be the highest performing computer in your shop.

Step 2. Second, install the workstation software on each computer you wish to use as a workstation by inserting this disc into each computer and selecting the “Workstation Installation” button.

NOTE: If the installation screen fails to appear (autorun) when you insert the disc into your computer, you can start the installation menu by browsing your DVD-ROM Drive and selecting the Autorun.exe file.

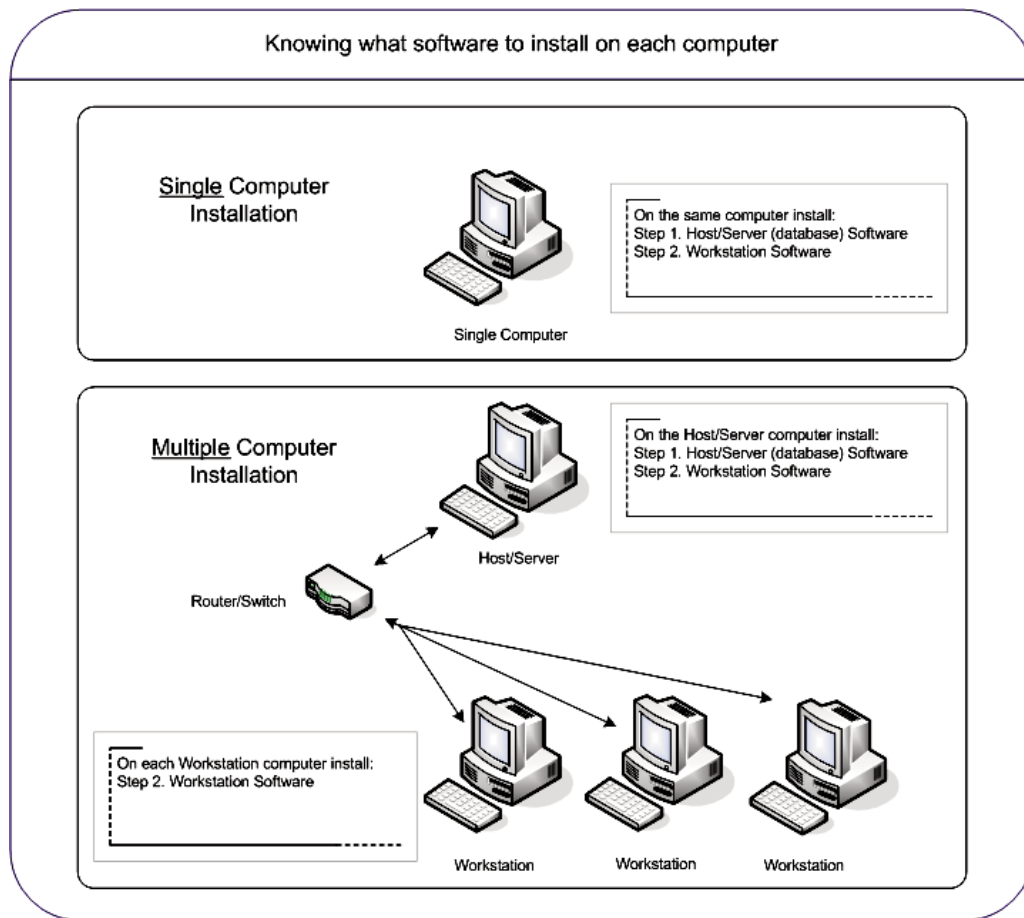
Detailed Instructions for Installing Your Shop Management System Software

You may follow the detailed instructions below to install your Shop Management system software on a single computer, or multiple computers, depending on your setup. If you would prefer brief instructions please see the previous section: "Quick Instructions for Installing Your Shop Management System Software"

The Shop Management system software consists of two separate components:

- First is the Host/Server software component. This is the database software which will store all of your Customer Data, Repair Order History, etc. This software is installed as the first step.
- Second is the Workstation software component. The workstation software is essentially your window into the database and is what you will see on your computer monitor. This software is installed as the second step.

You will be installing these same two software components regardless of whether you are installing on a single computer, or if you are installing on multiple computers. What does change based on your setup is which of these two software components will be installed on each computer.



NOTE: If you are already a Shop Management system user, it is important to backup your existing Shop Management system database before installing this software. This is a critical step to avoid possible data loss in the event that the installation fails or is interrupted. The database migration during the upgrade process may take hours depending on the size of your existing database and the speed of your computer.



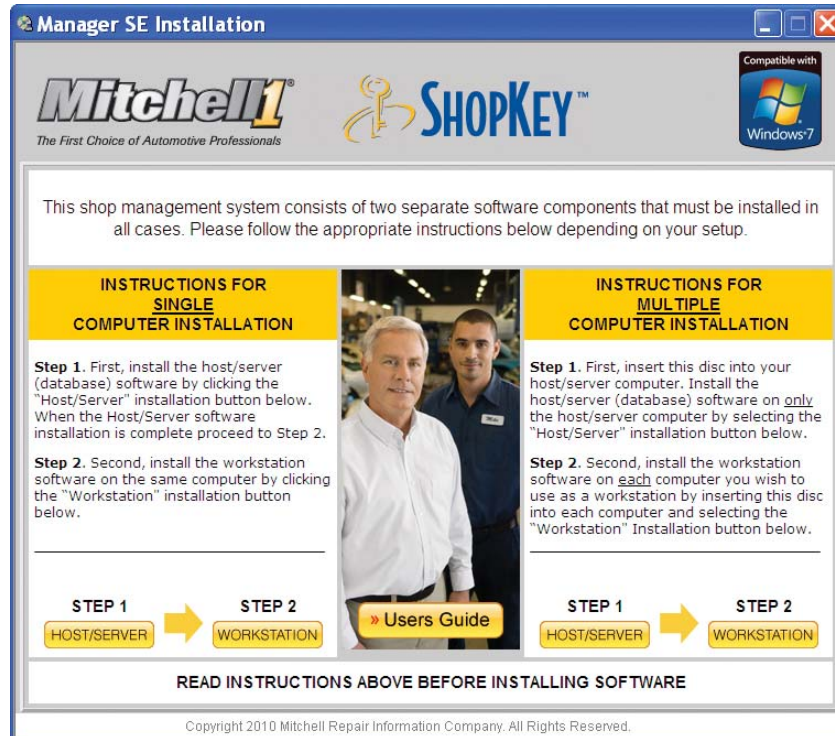
Step 1: Host/Server Installation

Single Computer Setup: If you have a single computer you will be installing the host/server software on your computer as the first step. It is critical that the host/server software installation is completed before moving on to the installation of the workstation software.

Multiple Computer Setup: You will be installing the host/server (database) software on only one host/server computer as the first step. For best performance, the computer you choose to act as your host/server should be the highest performing computer in your shop. It is critical that the host/server software installation is completed before moving on to the installation of the workstation software on any of your computers.

To Install the Host/Server software

1. Begin by inserting your installation disk into the DVD-ROM drive of your computer. The Installation menu should display automatically. Select STEP 1: HOST/SERVER INSTALLATION to continue.



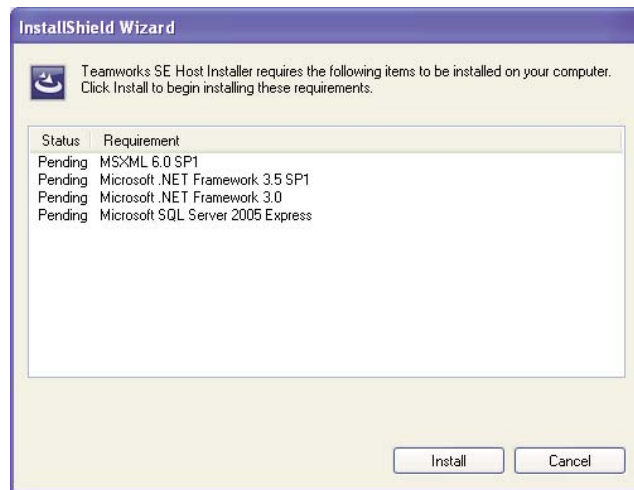
Manager SE Installation Menu

NOTE: If the installation screen fails to appear (autorun) when you insert the disc into your computer, you can open the installation menu by performing the following:

Windows XP: Select the START menu > select MY COMPUTER > Select your DVD drive > Select AUTORUN.EXE

Windows 7/Vista: Select the START menu (Windows Icon) > select COMPUTER > Select your DVD drive > Select AUTORUN.EXE

2. The installation program scans your computer for existing Windows components and presents a list of those components it will need to install. Click INSTALL to continue.

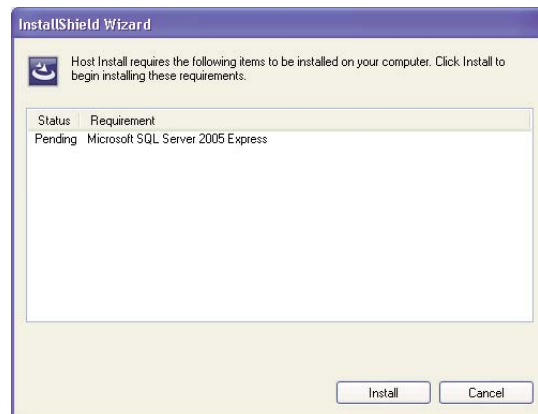


Installation Components

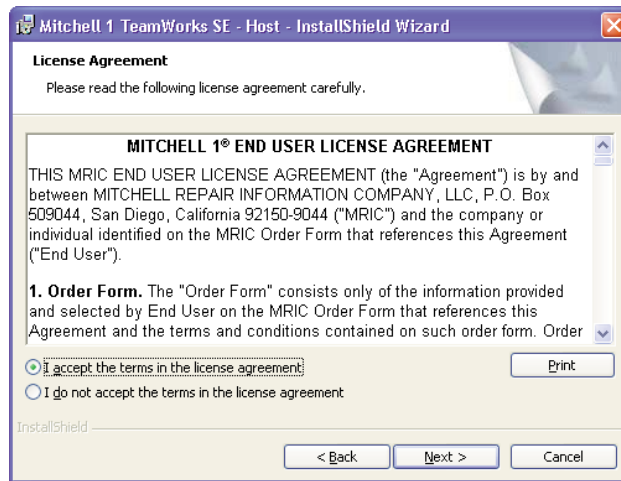
3. After components are installed, you will be prompted to reboot your computer. Select YES to continue.



4. After your computer reboots you will be prompted to continue installation. Select INSTALL to continue.

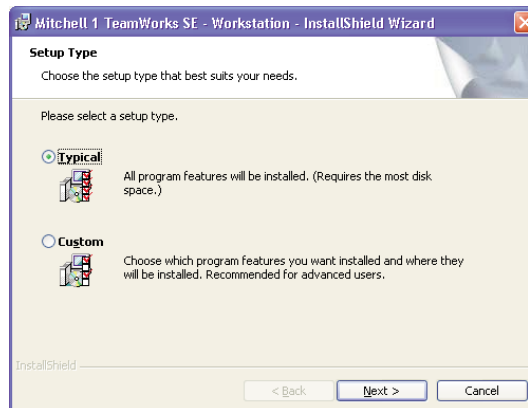


- When the License Agreement displays, you must select "I accept the terms in the license agreement", then click NEXT to continue.



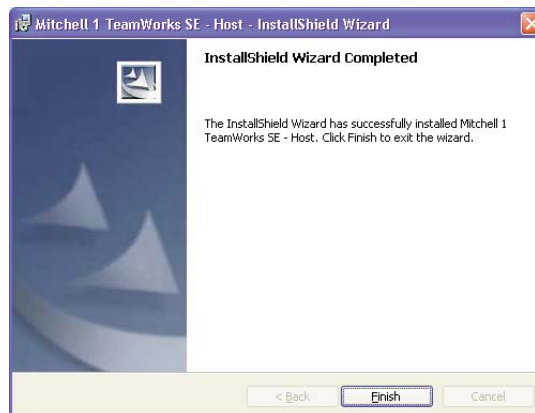
End User Licensing Agreement

- You are prompted to choose between a Typical and Custom installation. Most users will want to choose the Typical (default) option. Click NEXT to continue.



Setup Type

- The Host/Server installation is now complete. Click on FINISH.

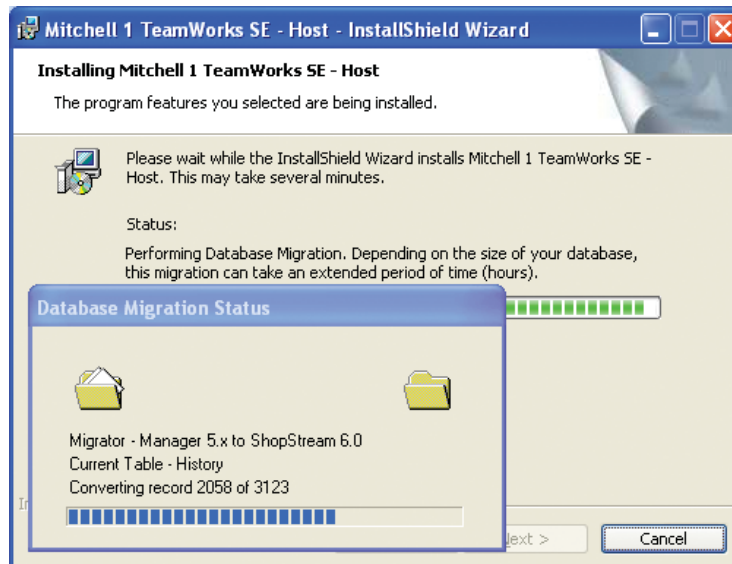
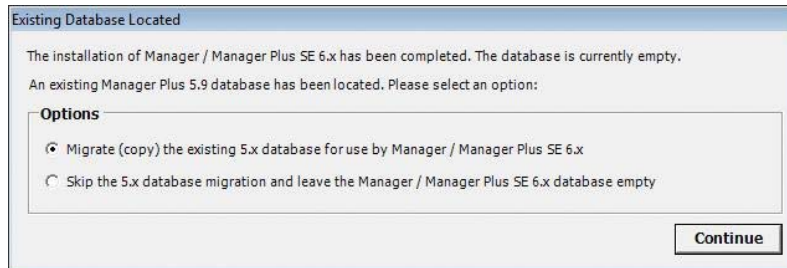


Host Install Program Completed

You are now ready to begin the second step, which is the installation of the Workstation software component. Please continue to the following section titled: "Step 2: Workstation Installation"

NOTE: Existing Shop Management Users - When upgrading from Mitchell 1 / ShopKey Shop Management version 5.7 or above, you will be presented with a database migration screen. You may choose to make a copy of your existing version 5 database for use by the version 6 software (This process will leave your existing version 5 database intact), or you may choose to skip this step and start with an empty version 6 database.

It's important to note that the migration utility transfers a copy of the version 5 database into the version 6 database and overwrites any existing data in version 6. Therefore, the migration utility cannot be used to combine a version 5 and a version 6 database. If you wish to transfer your database from version 5 into version 6 you must complete the transfer before you begin to use version 6 or all your newly entered version 6 data will be overwritten by the migration.



Many configuration settings are transferred between the two systems during the database migration process. However, after the migration is complete and you have installed the Workstation software you will need to review the Setup areas of your new version 6 system to ensure that the product is configured as expected. This includes:

- Standard Descriptions
- Standard Tables
- Shop Data Setup
- Technicians Setup
- Vendor Setup
- Packages & Discounts
- Tire Packages
- Brake Packages
- Lube, Oil, & Filter Packages
- Parts Kits
- Canned Jobs

There are a number of settings that cannot be transferred during the database migration process due to design differences between the version 5 and version 6 systems. You will need to configure these settings in your new version 6 system:

- The User and Program Security lists have been merged into a single common list in the version 6 system and will need to be recreated.
- A printer will need to be selected for each workstation
- Reports will need to be selected in the End-of-day print list

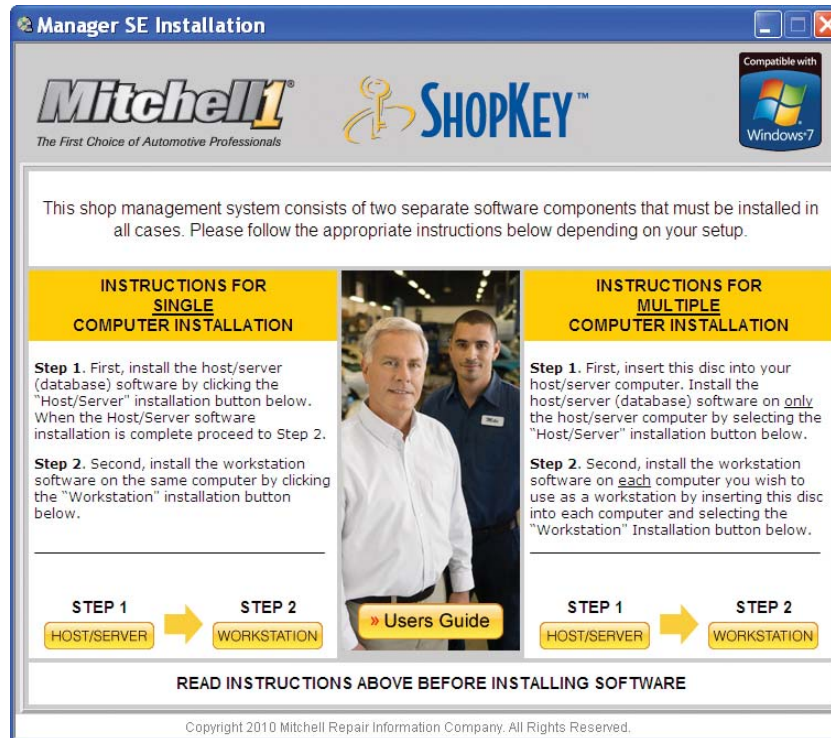
Step 2: Workstation Installation

Single Computer Setup: Now that you've completed the installation of the host/server software on your computer, your second step is to install the workstation software on the same computer.

Multiple Computer Setup: Now that you've completed the installation of the host/server software on one computer, the second step is to install the workstation software on each computer. You will need to insert the installation disc into each separate computer, and on each of these separate computers follow the same steps for the workstation install.

To Install the Workstation software:

1. Begin again on the Installation menu screen. This time click the STEP 2: WORKSTATION INSTALLATION button.



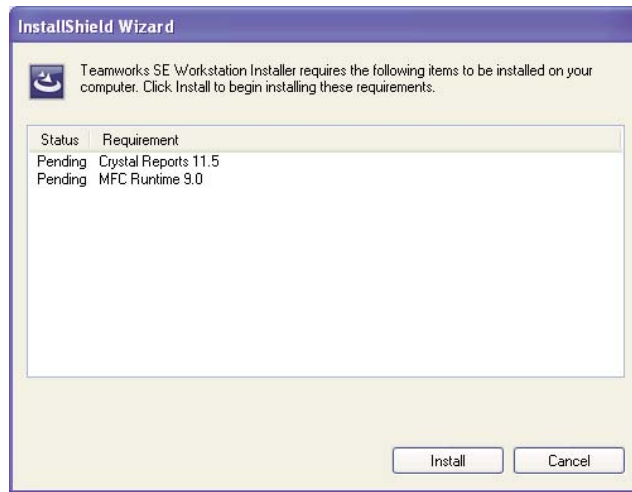
Manager SE Installation Menu

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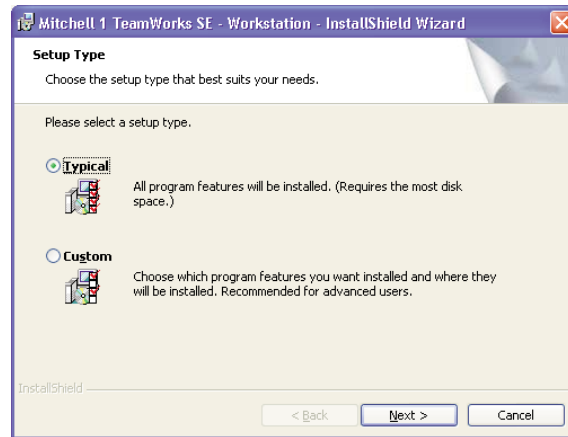
Windows7/Vista: Select the START menu (Windows Icon) > select COMPUTER > Select your DVD drive > Select AUTORUN.EXE

2. The installation program scans your computer for existing Windows components and presents a list of those components it will need to install. Click INSTALL to continue.



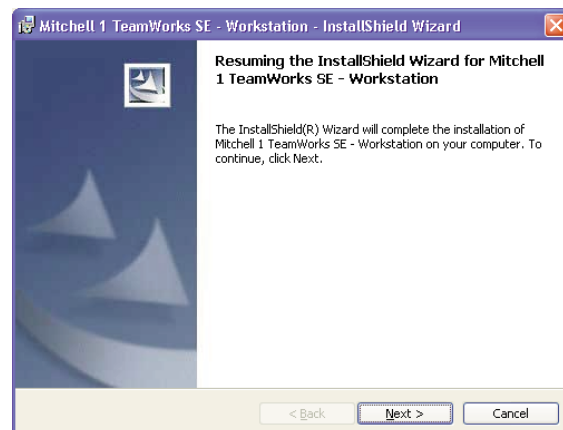
Install Components

3. You are prompted to choose between a Typical and Custom installation. Most users will want to choose the Typical (default) option. Click NEXT to continue.

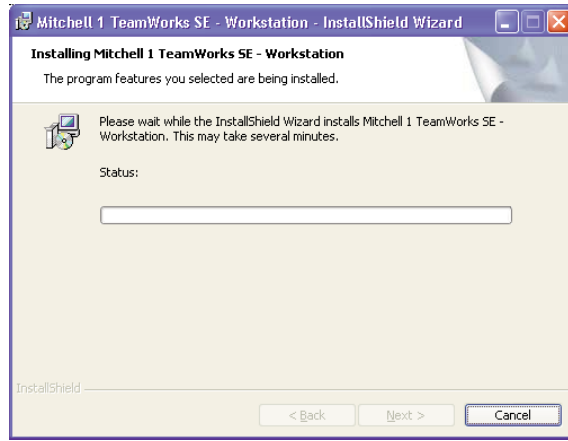


Select Setup Type

4. You will be informed of installation progress. Depending on the components being installed, you may be prompted to resume setup. Should this happen, click Next to continue.

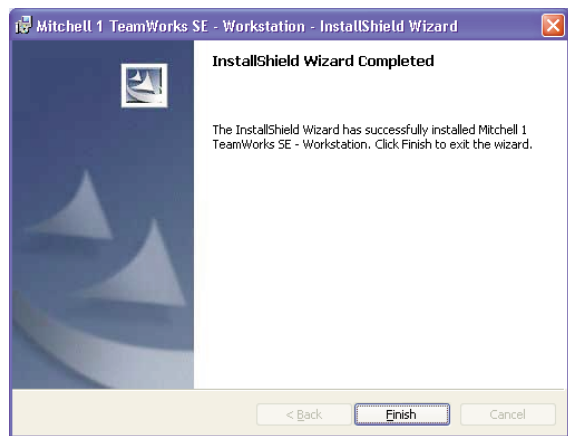


Resume Setup



Workstation Setup Progress

5. Once Workstation setup is complete, you will receive a notification. Click on Finish to complete.



Workstation Setup Complete

Congratulations, you've finished the installation process! (Remember, if you're installing on multiple computers you must make sure to install the workstation software on each computer). Now that you've completed the installation process you'll need to activate your subscription. Continue to the next section for instructions.

Chapter 2 Getting Started

Overview

Your TeamWorks SE software is a set of integrated programs, or components, which provide a comprehensive solution for automotive service shop management, estimating, and parts ordering. This chapter describes how to activate your Shop Management system and provides a brief introduction to each of the components. For more detailed information on a particular component, refer to the Help section for that component.

Starting your Shop Management System

Your Shop Management system software is started by double-clicking the program icon on your desktop. The application opens.



Opening Screen

The first time you open the system, you will be prompted to enter your shop and account information. Fill out these screens carefully. If you wish to access the program in Demo mode, there are special steps for setup and activation. Please refer to the section on Demo Setup below.

Activating Products

You must activate your products before working with the Shop Management system.

1. You are prompted to activate your product the first time the program is started. Click the forward button to continue.



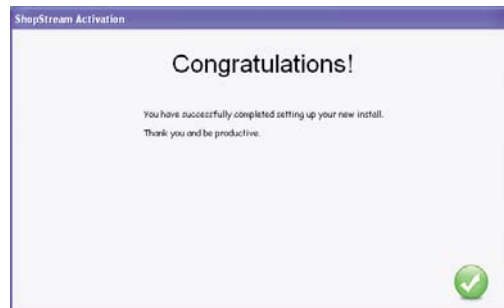
Activate Products

2. You are prompted to enter your Customer Account Number. Enter your Customer Account Number and click the forward button to continue.



Enter Account Number

3. At this point the application connects to the Internet and activates your subscription. When your subscription is validated you are informed that activation is complete.



Activation Complete

NOTE: If you have installed the Workstation software on multiple computers, only the first workstation opened will display the activation screens. Subsequent workstations will not require the Account Number activation process.

Demo Mode

It is possible to install a limited-functionality demo version of the Shop Management software. You will need to go through all the same steps as a normal install but when the Account Number activation screen is displayed you will need to follow the instructions outlined in the companion document title "Instructions for Activating Demo Mode."

Component Overview

The Shop Management component provides the organization and structure for the suite of management tools. Additional components are available for accessing repair and estimating information. Depending on your subscription, a combination of some, or all of the following Components are available.



Shop Management

Shop Management is where you create orders, store your customer information, view your work in progress, and essentially manage your business. Choose the W.I.P. icon to open the Work In Progress screen and view your active work orders.



Repair Information

Selecting this button opens OnDemand5.com/ShopKey5.com Repair and Estimating information just as if you had entered into OnDemand5.com or ShopKey5.com through a separate Internet window. The vehicle you have selected in the Shop Management system is transferred over and preselected in OnDemand5.com/ShopKey5.com

NOTE: Selecting the Repair Information Component as explained above is one of the two ways that you can access OnDemand5.com/ShopKey5.com through the Shop Management software. The “Repair,” “Estimator,” “TSBs” and “Maint.” buttons within the Shop Management screens are direct links to the corresponding Repair, Estimator, TSB, and Maintenance tabs in OnDemand5.com/ShopKey5.com. These buttons allow for direct access to the desired OnDemand5.com/ShopKey5.com tab for the vehicle already selected in the Shop Management screen. This setup allows you to quickly navigate to Estimator or Maintenance, select the desired data, and transfer that data back to the Shop Management system.

Getting Detailed Help

To access Help or User Documentation:

Shop Management - At the opening screen, or while working in the Management Component, choose “Help Files Index” from the Help menu to browse available subjects. Also, the Shop Management Software features context-sensitive help. Click [F1] on your keyboard while viewing any screen or dialog box to get help specific to the area of the program you are working in. Click User Guide from the Help menu to open the User Guide.

Repair Information - Click on the Repair Information Component button to open OnDemand5.com/ShopKey5.com. Click the Help link at the top right corner of the inner window to access online help for OnDemand5.com/ShopKey5.com.

