

# QUICK START GUIDE

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FTVersionTrak

Version 1.9.x

**FasTrak**  
SoftWorks, Inc.

[www.fast-soft.com](http://www.fast-soft.com)

262.238.8088

This is a Quick Start guide, not a comprehensive manual. Its purpose is to get you started, and many features are not mentioned. For detailed descriptions of the features, refer to the FTVersionTrak help system.

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# FTVersionTrak Client Requirements

The following is required to install the FTVersionTrak client:

- Operating systems supported:
  - Windows XP Professional Sp1A or later
  - Windows Vista (Business or Enterprise)
  - Windows 7 (Professional, Enterprise, or Ultimate)
  - Windows 8 and Windows 8.1
- 100 MB free disk space
- FTVersionTrak requires Microsoft Data Access Components (MDAC) v2.7. MDAC 2.7 will be installed or updated automatically to meet this requirement.
- FTVersionTrak requires the .NET framework 2.0 or higher; this component will be installed or updated automatically to meet this requirement.

**NOTE:** You must be logged in as the administrator to install FTVersionTrak. In addition, Windows User Access Control must be disabled to install and use FTVersionTrak.

# MS SQL Server 2008 Database Requirements

The following is required to install the SQL Server 2008 database:

- Operating systems supported:
  - Windows 7
  - Windows Server 2003 Service Pack 2
  - Windows Server 2008
  - Windows Server 2008 R2
  - Windows Vista Service Pack 1
  - Windows XP Service Pack 3
  
- 32-bit systems
  - Intel or compatible 1 GHz or faster processor (2 GHz or faster recommended)
  - Minimum of 256 MB of RAM ( 1 GB or more is recommended)
  - 1 GB of free hard disk space
  
- 64-bit systems
  - 1.4 GHz or higher processor (2 GHz or faster recommended).
  - Minimum of 256MB of RAM (1 GB or more is recommended)
  - 1 GB of free hard disk space



# Disabling User Access Control (UAC)

Windows User Access Control (UAC) must be disabled in order to install and use FTVersionTrak. Use the following instructions to disable UAC for either Windows 7 or Windows Vista. Windows XP does not use UAC.

## Windows 7

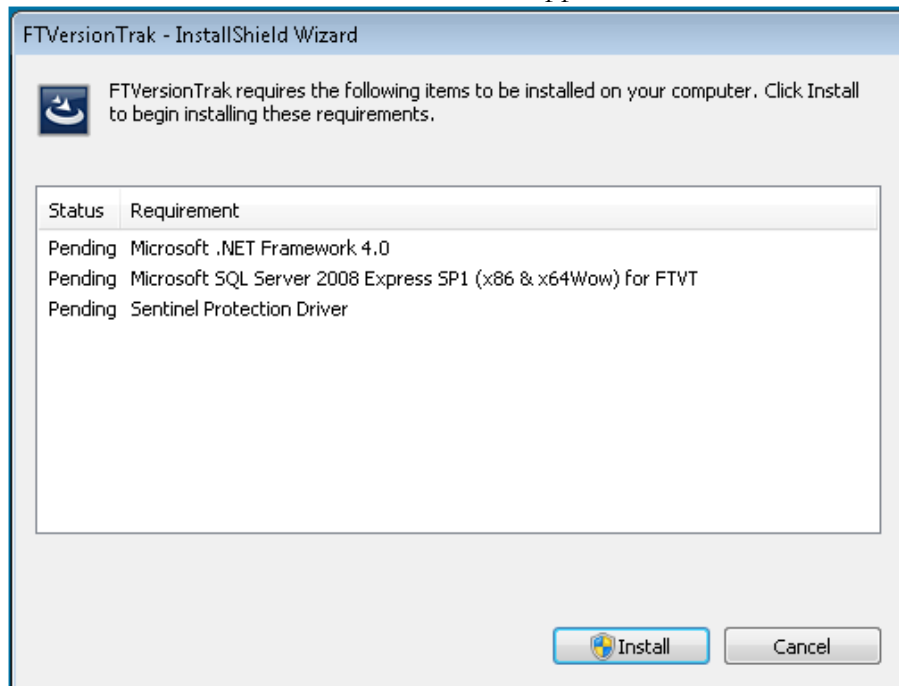
1. Open User Account Control Settings by clicking the **Start** button, and then clicking **Control Panel**. In the search box, type **uac**, and then click **Change User Account Control settings**.
2. To turn off UAC, move the slider to the **Never notify** position, and then click **OK**. If you're prompted for an administrator password or confirmation, type the password or provide confirmation. You will need to restart your computer for UAC to be turned off.

## Windows Vista

1. Open User Accounts by clicking the **Start** button, clicking **Control Panel**, clicking **User Accounts and Family Safety** (or clicking **User Accounts**, if you are connected to a network domain), and then clicking **User Accounts**.
2. Click **Turn User Account Control on or off**. If you are prompted for an administrator password or confirmation, type the password or provide confirmation.
3. Clear the **Use User Account Control (UAC) to help protect your computer** check box to turn off UAC and then click **OK**. You may need to restart your computer for UAC to be turned off.

## Installation Instructions

1. Insert the FTVersionTrak CD into your computer's CD-ROM drive.
2. The Install Wizard should start automatically. If not, open the file explorer, select the CD-ROM drive in the left pane, and run the setup.exe file.
3. The FTVersionTrak Install Shield Wizard appears.



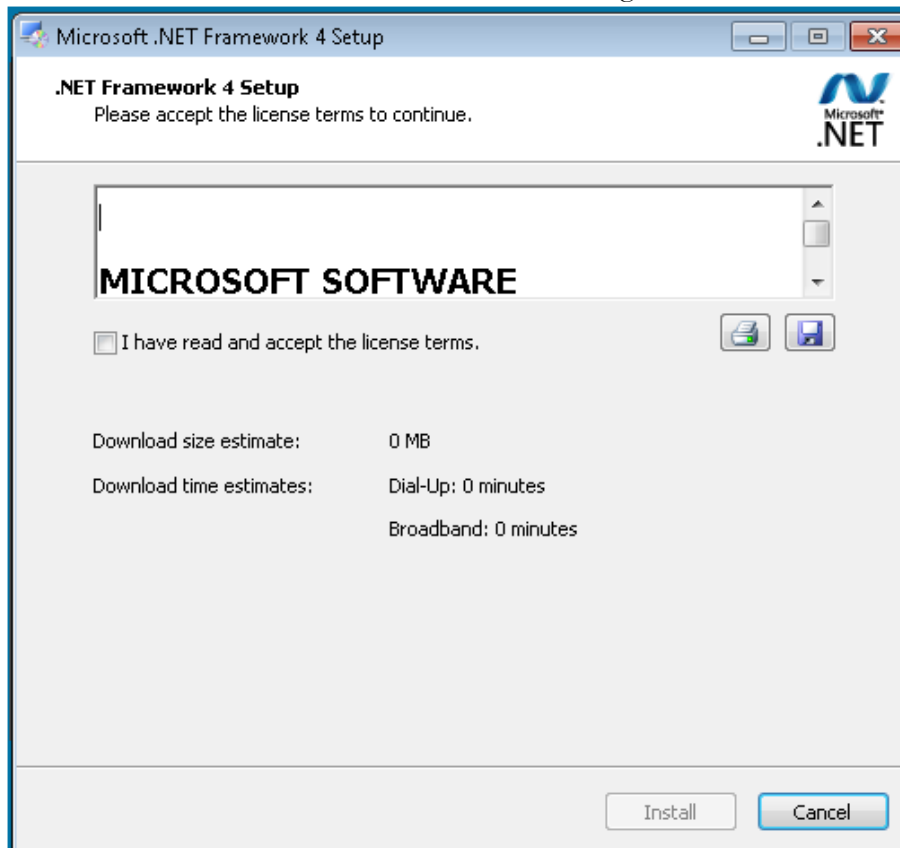
The installation installs the following components:

- Microsoft .NET Framework (required)
- Microsoft SQL Server 2008 Express SP1 (optional)
- Sentinel Protection Driver (required for use of FTVersionTrak with keyed licenses)

4. Click **Install** to begin Installation.

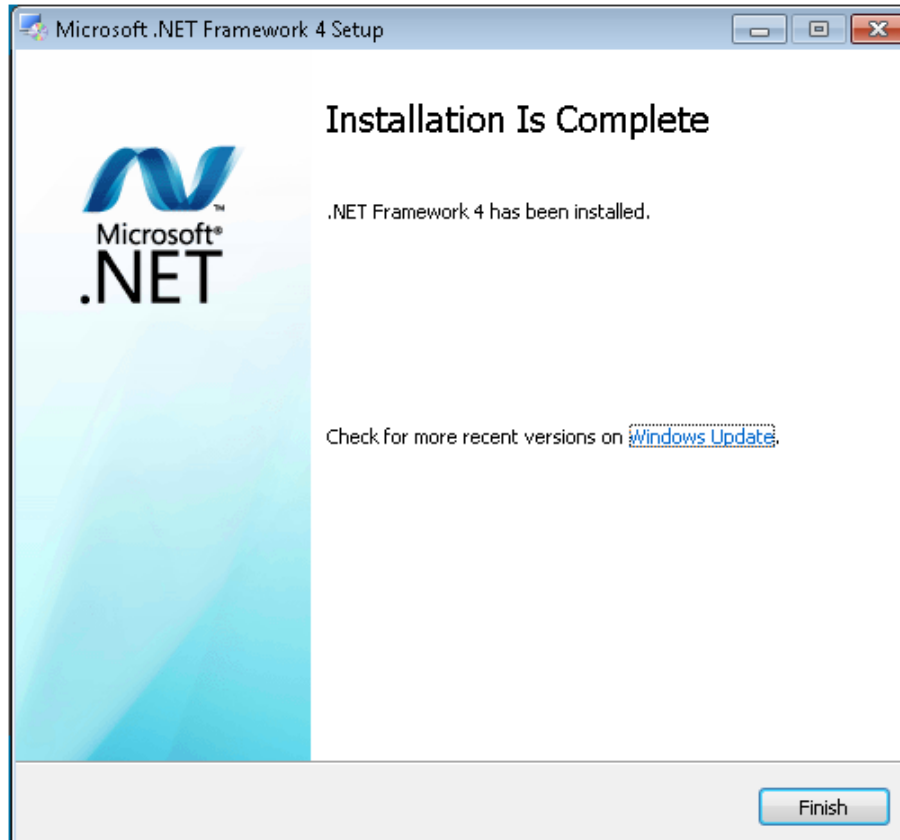
**NOTE:** You must be an Administrator to install FTVersionTrak.

5. The Microsoft .NET Framework installation begins.

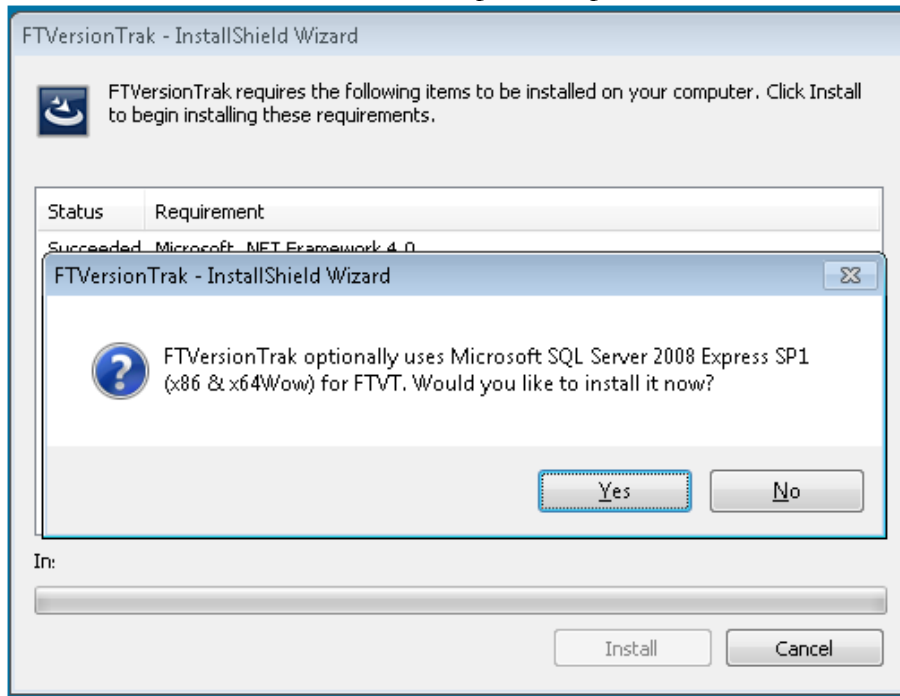


6. Accept the Microsoft .NET Framework terms and conditions, then click **Install** to begin the installation.

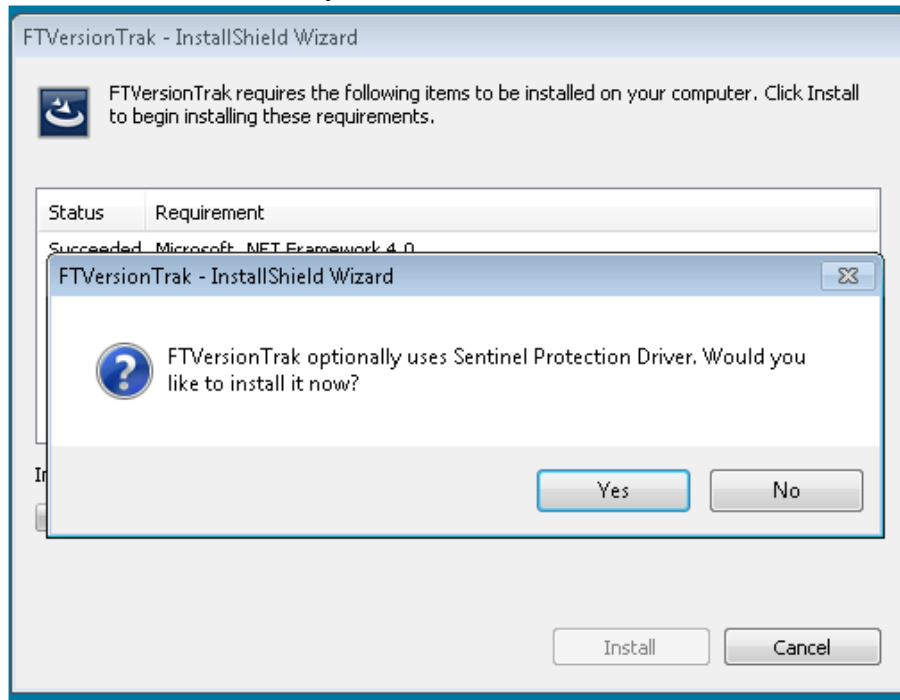
7. When installation is complete, click **Finish** to continue.



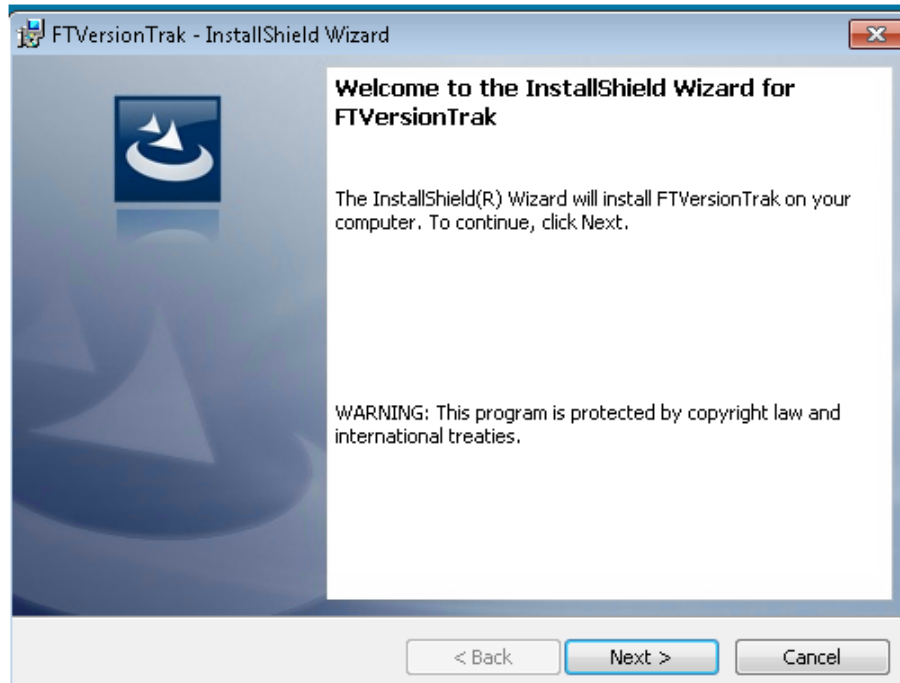
8. The following screen gives you the option to install Microsoft SQL Server. Click **Yes** to install SQL, or click **No** to skip this step.



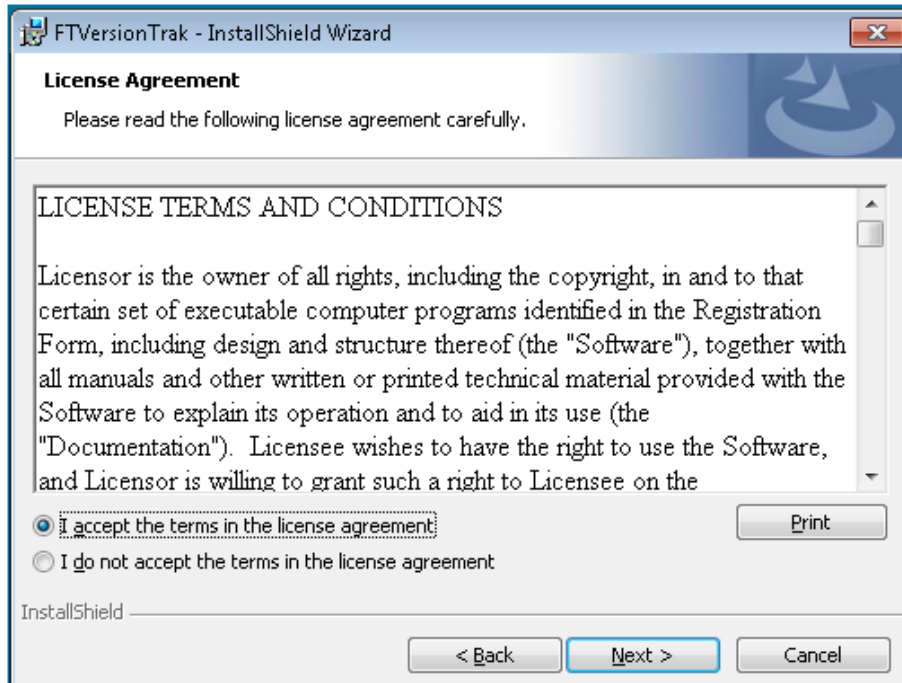
9. After installation of SQL is complete, the following screen gives you the option to install Sentinel Protection Driver (FT-KEY Driver). Click Yes to install the Sentinel Protection Driver, or click No to skip this step. **This step is required for use of**

**FTVersionTrak with keyed licenses.**

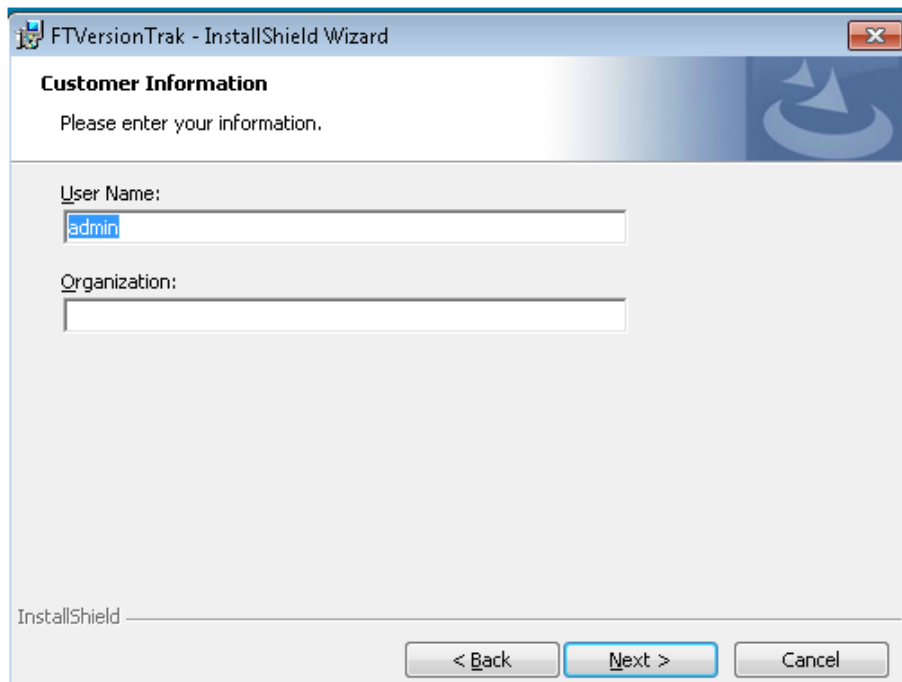
10. After installation of Sentinel Protection Driver is complete, the FTVersionTrak client Install Shield Wizard appears. Click **Next**.



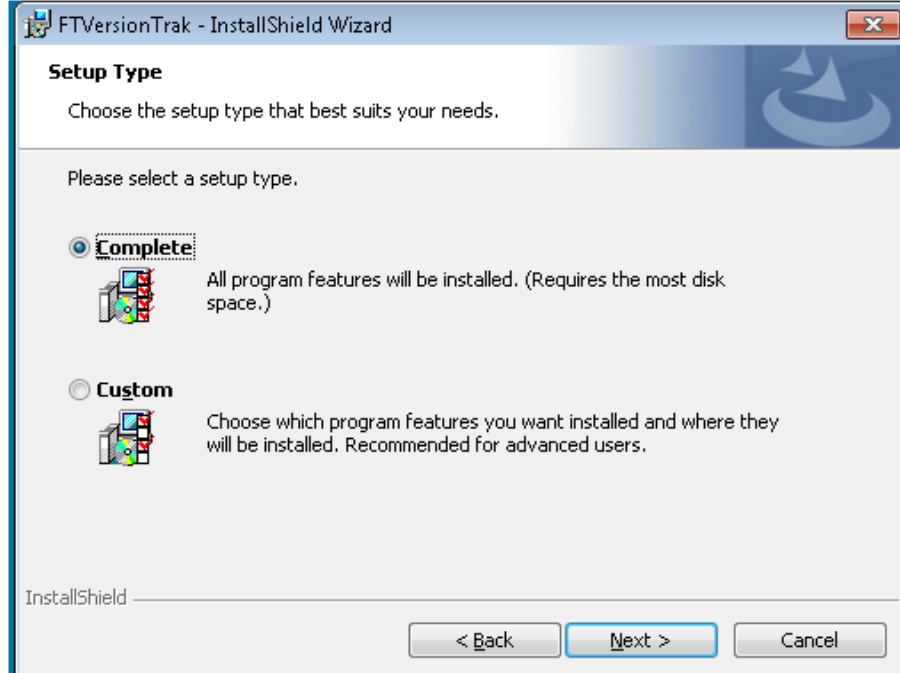
11. Accept the FasTrak license terms and conditions, then click **Next** to continue.



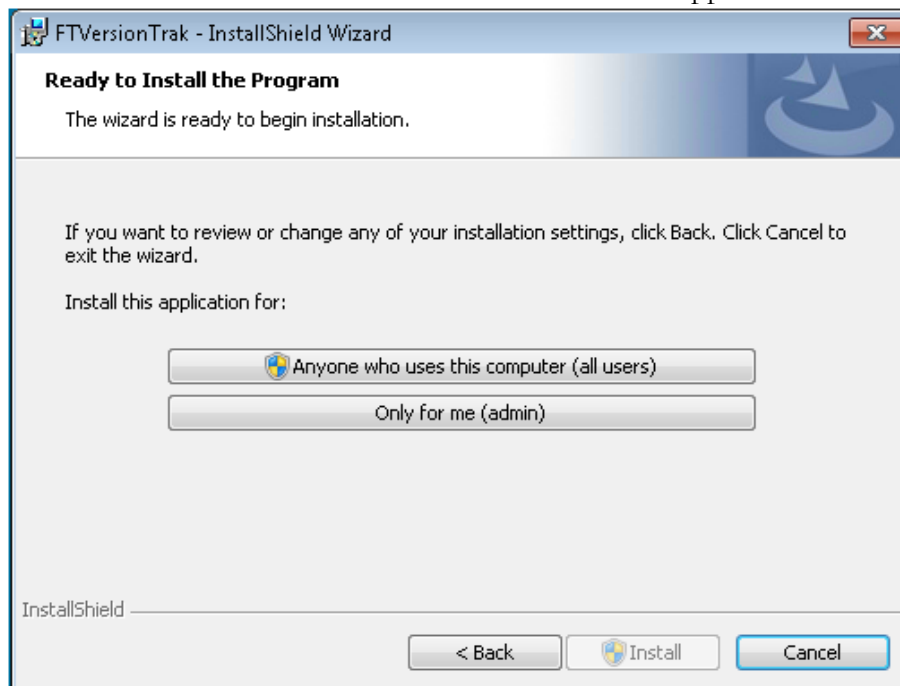
12. Enter a user name (required) and organization name (optional). Click **Next** to continue.



13. On the **Setup Type** window, select **Complete**. Click **Next**.

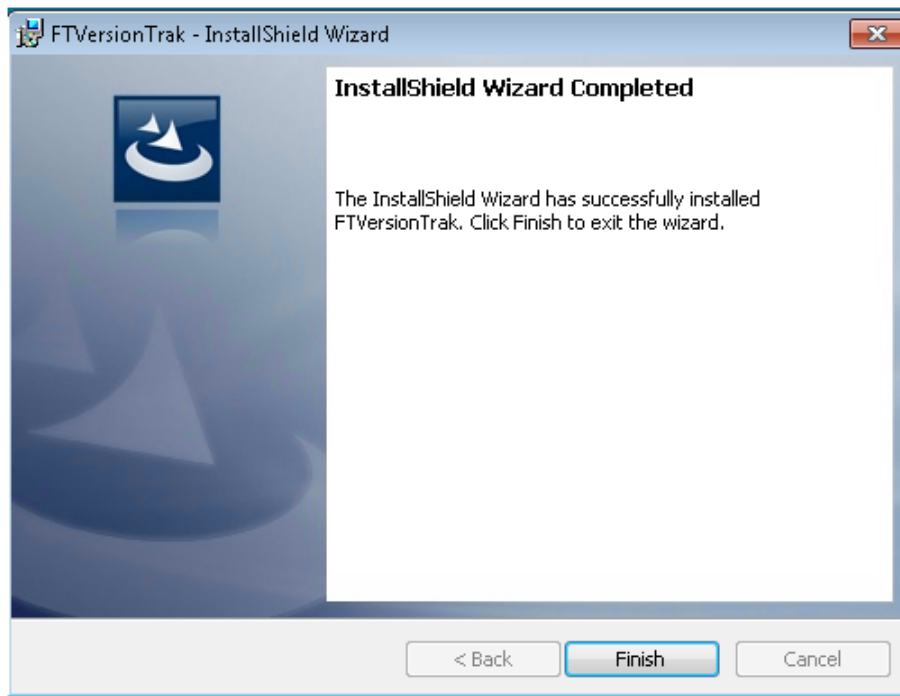


14. Select who should have access to the FTVersionTrak application. Click **Install**.





15. After installation of the FTVersionTrak client is complete, click **Finish** to complete installation.



## Demo Mode Restrictions

If using this software without a license, you may run FTVersionTrak in demo mode, which restricts the application to limited functionality. Running FTVersionTrak in demo mode gives you the opportunity to try out all of FTVersionTrak's powerful features before buying a license for it.

When you start FTVersionTrak without a license the following message appears:



Click **Demo** to run FTVersionTrak in demo mode.

The following restrictions apply when using FTVersionTrak in demo mode:

Users will be able to:

- Create one repository.
- Add any of the 10 included example files in the repository.
- Create up to four versions of any one file.
- Compare versions of any of the included example files.

Once you have reached your file and version limit, if you would like to continue evaluating the demo, you can reset the repository and start again by clicking **Restore Repository to Factory State** on the **File** menu. This function will clear all data from the repository and reset any configured settings to their defaults. Please note that you cannot add any files to the repository other than the sample files provided with the demo, and that these files cannot be altered in any way prior to adding to the repository. Attempts to add modified sample files or any other files to the repository while in demo mode are restricted and will result in an error.

If you do not have a license and would like to receive the full functionality of FTVersionTrak, contact the FasTrak sales department at [sales@fast-soft.com](mailto:sales@fast-soft.com) or call 262.238.8088.

# Setting Local Security Policy

By default, many Windows installations force network logins that use local accounts to be authenticated as Guests. FTVersionTrak requires that network logins that use local accounts must authenticate themselves. To accomplish this, the server machine's Local Security Policy must be changed to permit local users to authenticate as themselves. Ask your IT or network administrator for assistance, or consult your Windows documentation for the specific procedures to follow for your version of Windows. The following instructions describe how to change the local security using Windows XP Professional (other versions of Windows may require different instructions):

1. Click **Control Panel** on the Start menu.
2. In Control Panel, double-click the **Administrator tools** icon.
3. In the Administrative tools window, double-click **Local Security Policy**.
4. Under Security Settings, open the **Local Policies** folder.
5. In the Local Policies folder, open the **Security Options** folder.
6. In the **Policy** column, double-click **Network access: sharing and security model for local accounts**.
7. In the Network access: sharing and security model for local accounts dialog box, change the setting from **Guest only - local users authenticate as Guest** to **Classic - local users authenticate as themselves** and click **OK**.
8. Restart the computer.

## Checking Firewall Settings

Depending on the type of firewall used at your organization, you may need to add FTVersionTrak and SQL Server as exceptions in order to grant remote users access to FTVersionTrak. Consult the documentation that came with your firewall, or talk to your IT or network administrator, for assistance in configuring your firewall for use with FTVersionTrak.

## Checking Anti-Virus Settings

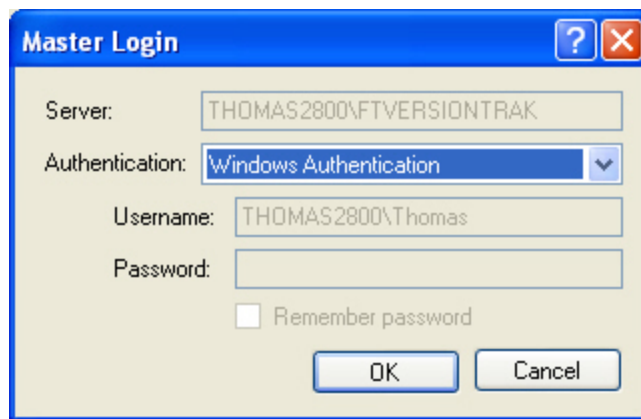
Antivirus programs such as Symantec's Norton AntiVirus and McAfee VirusScan also block programs from permitting incoming communications requests. SQL Server must be permitted to accept incoming requests to allow remote FTVersionTrak users to access a repository. See your system administrator or consult your antivirus software manual for information about program access permissions.

# Server Security

Server Security regulates and maintains user access to FTVersionTrak databases. Administrators define the SQL Server instance to be used as an FTVersionTrak database, select the users that will have access to the database, and determine the method of access allowed to each user of the database.

To access Server Security:

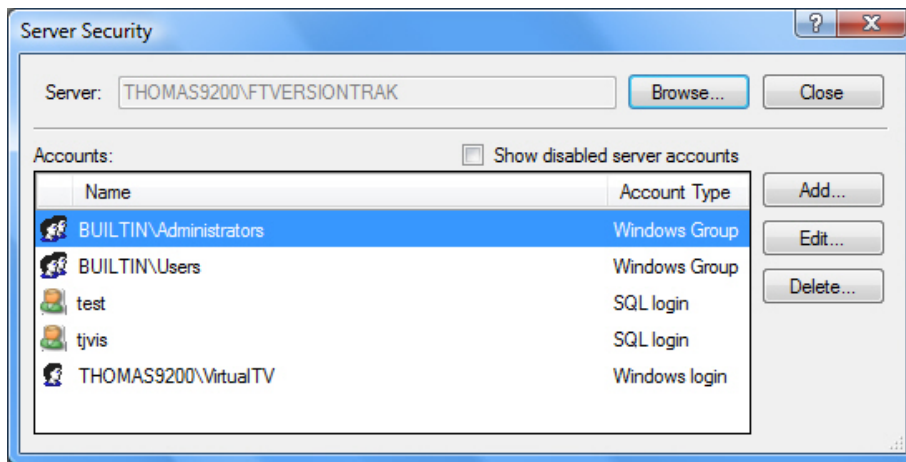
1. On the **Tools** menu, click **Server Security** or click the  toolbar button. The Master Login dialog box appears.



2. Click **OK**. By default, Windows Authentication is selected – this is the only authentication method that can be used to access Server Security.

**NOTE:** Only administrators may access Server Security. Continue reading for more information about adding and managing users.

After successfully logging in, the Server Security dialog box appears.

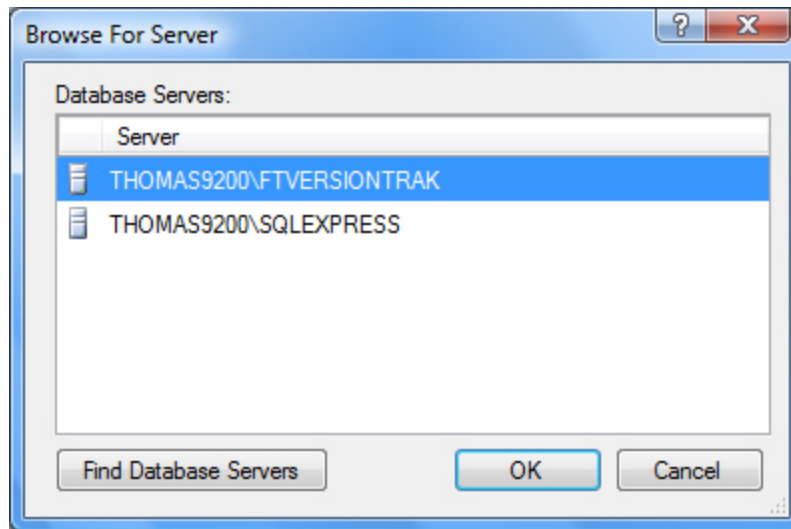


3. The Server Security dialog box displays the following information:

- **Server:** Displays the server being configured.
- **Accounts:** Displays all configured server accounts.

## Selecting a Server

1. In the Server Security dialog box, the SQL Server instance you will be configuring is displayed in the **Server** box. In cases in which multiple servers reside on the same machine, clicking **Browse** will display a list of available servers. Select the server you would like to configure or click **Find Database Servers** to search for all accessible servers.



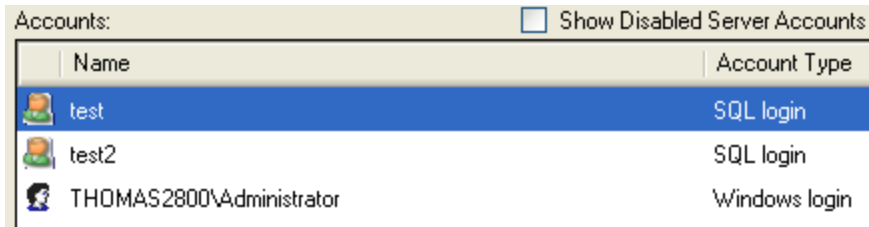
2. Click **OK** when finished to return to the Server Security dialog box.

**NOTE:** Clicking **Find Database Servers** searches for all available servers, including servers located on remote machines. You must be logged in to Windows as an administrator on the machine on which SQL Server is running to access Server Security.

## Viewing Server Accounts

A list of all available SQL Server accounts is displayed in the Server Security dialog box.





Name	Account Type
test	SQL login
test2	SQL login
THOMAS2800\Administrator	Windows login

Server Security supports two different types of accounts, displayed in the **Account Type** column:

- **Windows Login** represents a single user with a Windows login on the same machine as SQL Server connecting via Windows Authentication.
- **SQL Login** represents a single user logged in from a local or remote location to SQL Server via SQL Authentication.

**NOTE:** To allow workgroup users to log in to FTVersionTrak using Windows Authentication, the server machine's Local Security Policy must be set to allow local users to authenticate as themselves. See **Editing Local Security Policy** in the online help for more information.

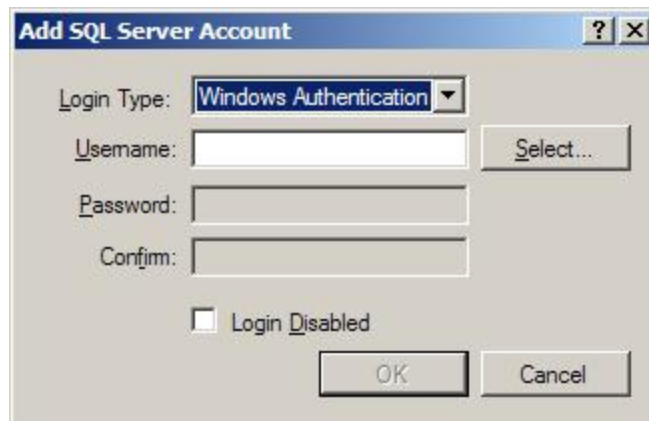
- Show disabled users by selecting the **Show Disabled Server Accounts** check box. You may disable an account in the Edit Server User dialog box accessed by clicking **Edit**.

## Managing Server Accounts

### Adding Users

To add SQL Server accounts that may access the FTVersionTrak database:

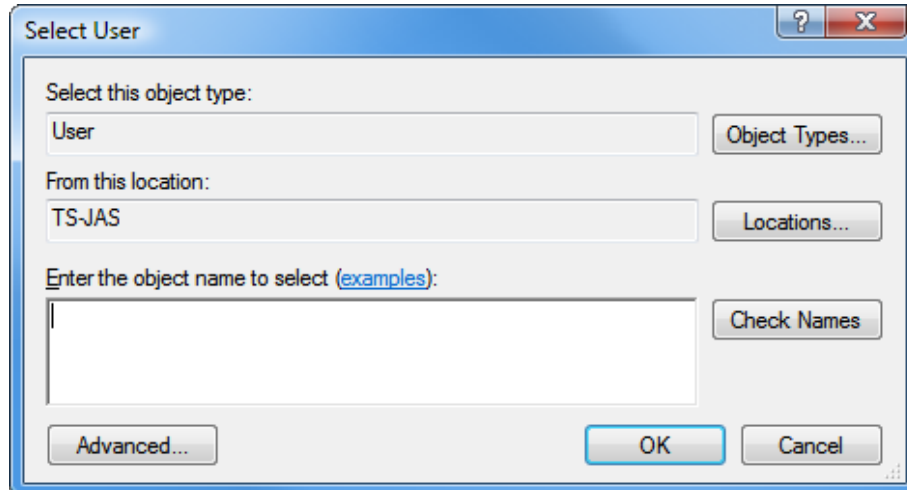
1. In the Server Security dialog box, click **Add**. The Add SQL Server Account dialog box appears.



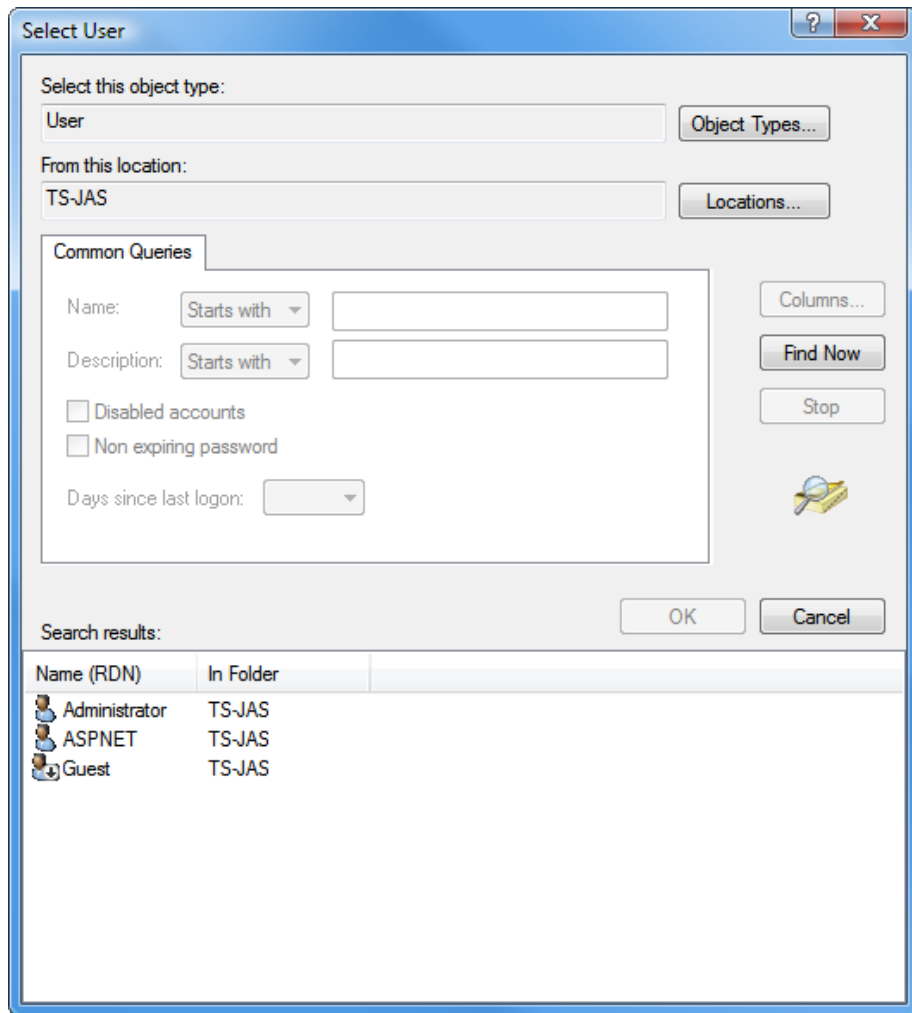
2. In the **Login Type** box, select the type of login you would like to add (Windows or SQL Authentication).
3. Configure the login you would like to add:

#### Windows Authentication

Type the name of the user in the **Username** text box or click **Select** to search for available users. If you choose to search, the Select User dialog box appears.



- Type search criteria in the **Enter the object name to select** box, or click **Advanced** for more options.
  - Click **Find Now** to search for all available logins from a single location.
  - Select a login from the list and click **OK**.



- Click **OK** when finished to return to the Add SQL Server Account dialog box.



The **Password** and **Confirm** text boxes cannot be selected; this information is governed by Windows Authentication.

**NOTE:** To allow workgroup users to log in to FTVersionTrak using Windows Authentication, the server machine's Local Security Policy must be set to allow local users to authenticate as themselves. See SQL Server Setup in the online help for more information.

#### SQL Authentication

- Enter the username and password of the SQL Server account you would like to configure in their respective fields. Retype the password in the **Confirm** box.

**NOTE:** The SQL Server instance must be configured to accept SQL Server Authentication. See SQL Server Setup in the online help for more information.

4. Select the **Login Disabled** check box to block this account's access to the FTVersionTrak database.
5. Click **OK** when finished to return to the Server Security dialog box.

## Editing Users

To edit SQL Server accounts that may access the FTVersionTrak database:

1. Click **Edit** in the Server Security dialog box. The Edit SQL Server Account dialog box appears.



2. Select the **Login Disabled** check box to block this account's access to the FTVersionTrak database.
3. Click **OK** when finished to return to the Server Security dialog box.

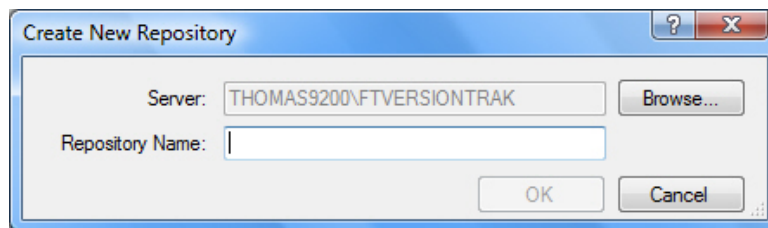
# Creating a Repository

Before you can begin adding files to FTVersionTrak, you must have a repository to manage them in. If no repository has been created for your project, the first step is to create one.

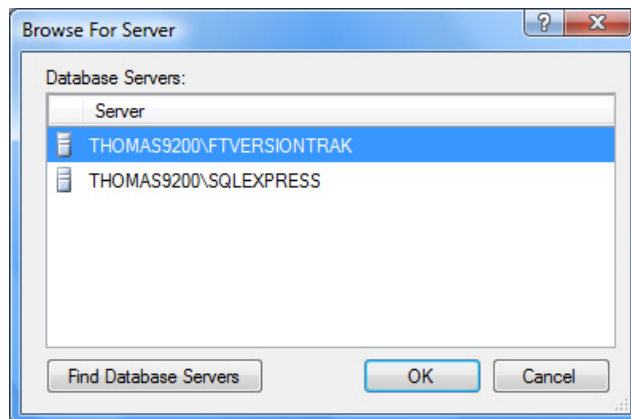
**NOTE:** FTVersionTrak PE users may only create one repository per license.

To create a repository:

1. Click **Create New Repository** on the **File** menu or press **CTRL+N**. The Create New Repository dialog box appears. (This dialog box can also be accessed from the Connect to Repository dialog box. See Connecting to a Repository for more information.)



2. The default server is listed in the **Server** box. To select another server, click **Browse**. The Browse for Server dialog box appears.



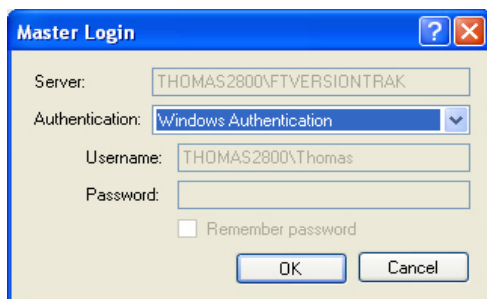
3. If the server you want to use is not displayed in the **Server** list, click **Find Database Servers** to search for all available servers. Click the server you want and then click **OK** to return to the Create New Repository dialog box.

**NOTE:** If the server you are looking for still does not appear on the list, contact your system administrator or see SQL Server Setup for setup information.

4. Type the name of the new repository in the **Repository Name** box.

**NOTE:** The repository name cannot contain spaces or special characters.

5. Click **OK** when finished. The Master Login dialog box appears.



5. Click **OK** to create the repository. By default, Windows Authentication is selected – this is the only authentication method that can be used when creating new repositories:

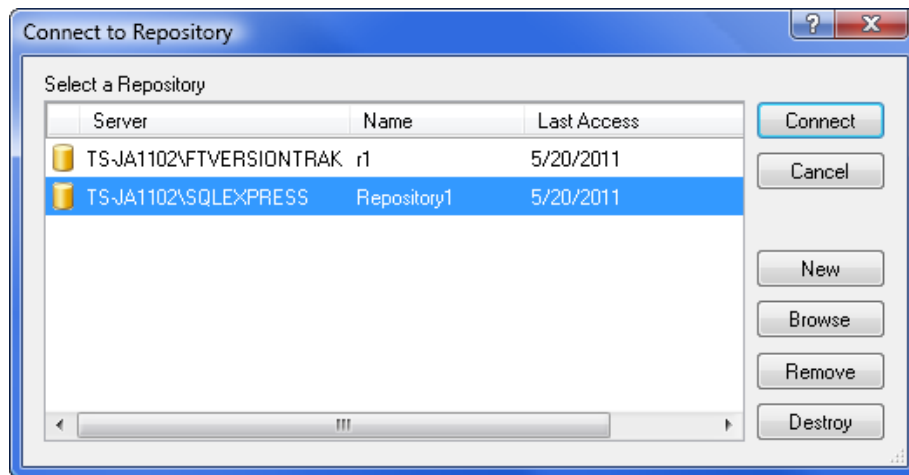
**NOTE:** Whichever user creates a repository automatically becomes the administrator of that repository, granting the user all repository privileges. See Repository Security for more information.

# Connecting to a Repository

Multiple repositories can be created and accessed by users depending on project needs and storage space. Each repository may have its own set of users, and each user may have its own set of Repository Permissions within each repository. After the administrator creates a repository, other users might need to connect to it.

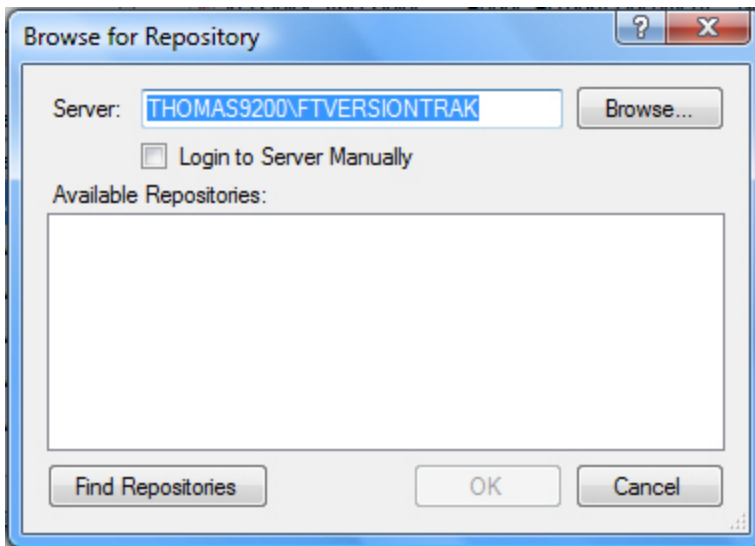
To connect to an existing repository:

1. Click **Connect to Repository** on the **File** menu, click the  toolbar button, or press **CTRL+C**. The Connect to Repository dialog box appears.

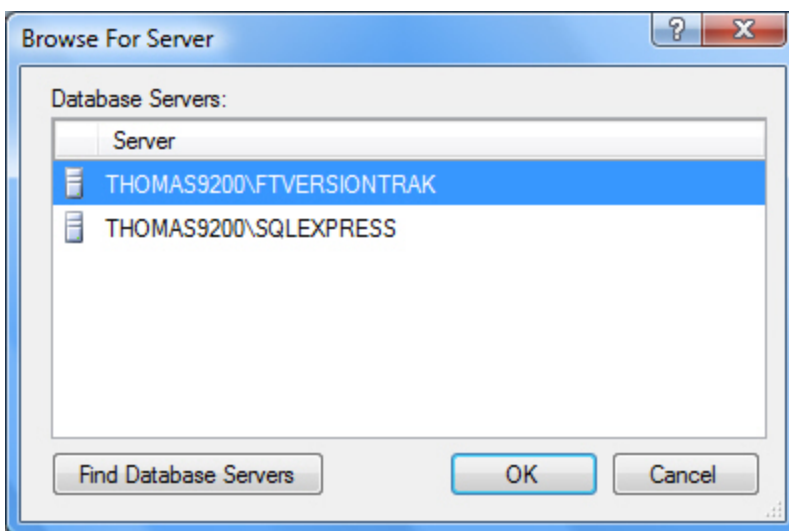


2. If you have connected to any repositories previously, they appear in the **Select a Repository** list. If no repositories have been previously connected to, or if the repository you want to use is not listed, click **Browse**. The Browse for Repository dialog box appears.





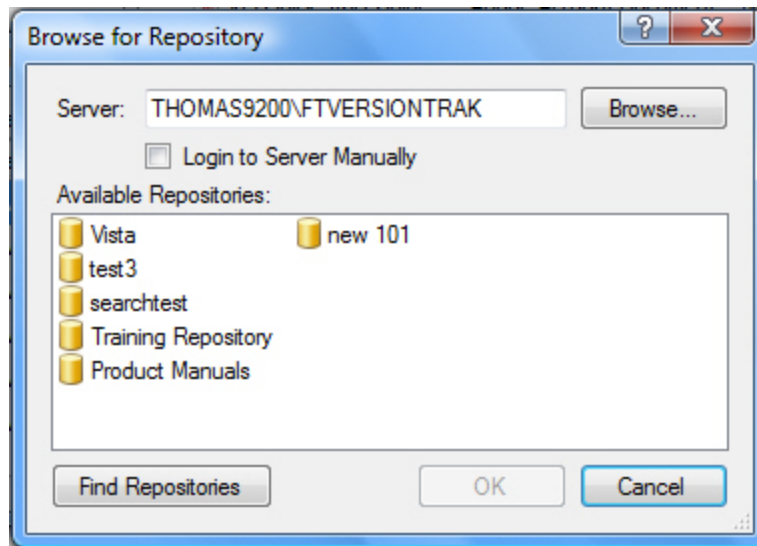
3. The default server will be listed in the **Server** box. To select another server, click **Browse**. The Browse for Server dialog box appears.



4. If the server you want to use does not appear in the **Server** list, click **Find Database Servers** to search for all available servers. Select the server you want to use from the list and then click **OK** to return to the Connect to Repository dialog box.

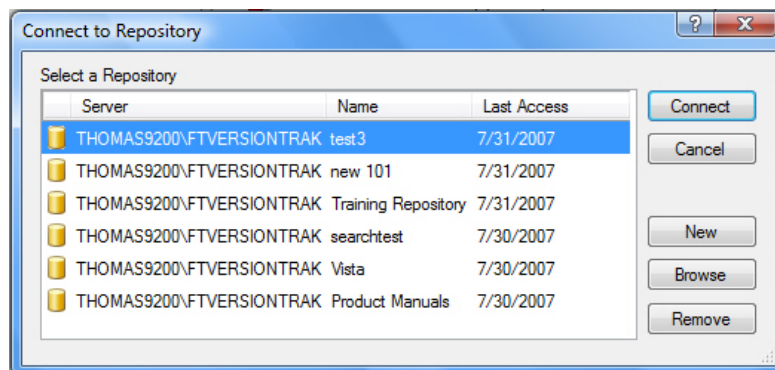
**NOTE:** If the server you are looking for still does not appear on the list, contact your system administrator or see SQL Server Setup for setup information.

5. Select the **Login to Server Manually** check box to force a manual login to the server. Use this option if a different user usually logs in automatically and the login needs to be changed.
6. Click **Find Repositories** to search for available FTVersionTrak repositories located on the server.



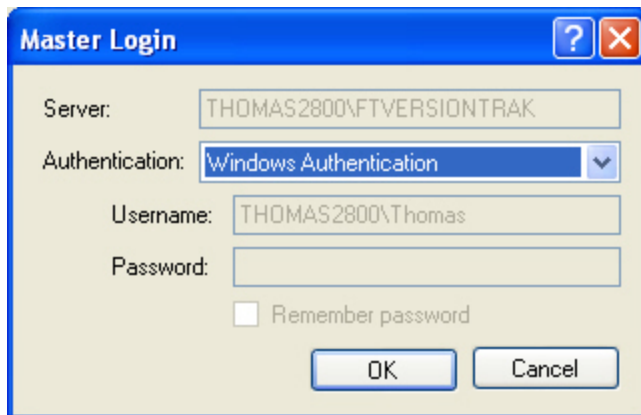
7. Select the repository you want to use from the **Available Repositories** list and then click **OK** when finished to return to the Connect to Repository dialog box.

**NOTE:** If the repository you are looking for still does not appear on the list, contact your system administrator or see the Administrator Guide for setup information.



- Click **Remove** to remove a repository from the **Select a Repository** list. Clicking **Remove** does not delete the repository – it only removes the repository from the list.
- Click **New** to Create a New Repository.

8. Select the repository and click **Connect**. The Master Login dialog box appears.



9. Select the mode of authentication from the **Authentication** box:

- **Windows Authentication:** This option utilizes the local Microsoft Windows user accounts to log on to the server. If this option is selected, the user currently logged in to Windows will appear in the **Username** text box. No password is necessary, and the login information cannot be edited.
- **SQL Authentication:** This option uses the login information located on the server itself. Selecting this option will prompt for both a username and password. See your system administrator for more information.

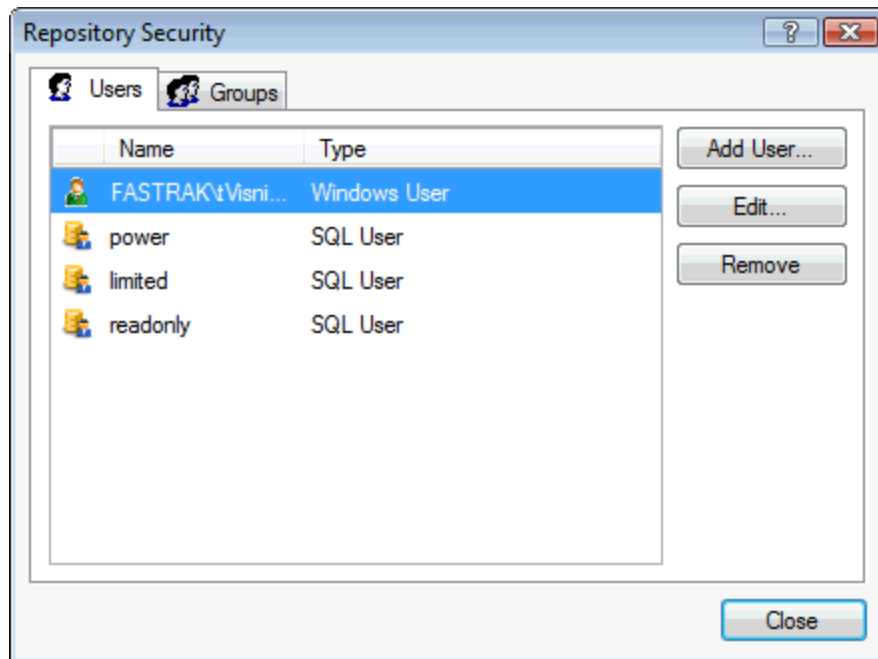
10. Click **OK** to connect to the repository.

# Repository Security

Repository security defines access permissions for each repository being protected by FTVersionTrak. The repository administrator (usually the creator of the repository) determines the users that can access a repository, as well as the level of access each user or group of users receives. Each repository may have a different administrator, who can either set predefined access 'levels' for each repository user, or define custom levels of security for one or many users based on specific repository permissions.

To access Repository Security:

1. On the **Tools** menu, click **Repository Security** or click the  toolbar icon. The **Repository Security** dialog box appears.

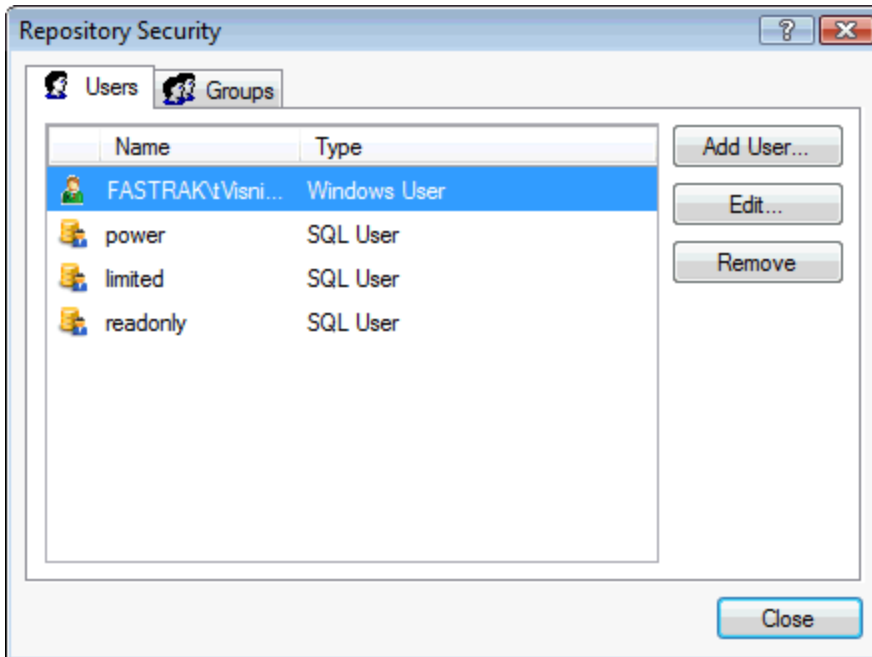


## Managing Repository Users

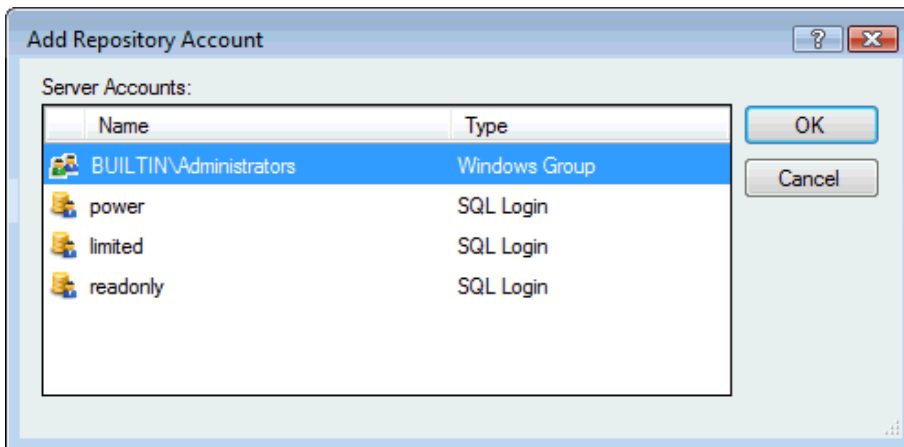
### *Adding Users*

To add a new repository user:

1. On the **Tools** menu, click **Repository Security** or click the  toolbar icon. The Repository Security dialog box appears.



2. Click **Add User**. The Add Repository Account dialog box appears.



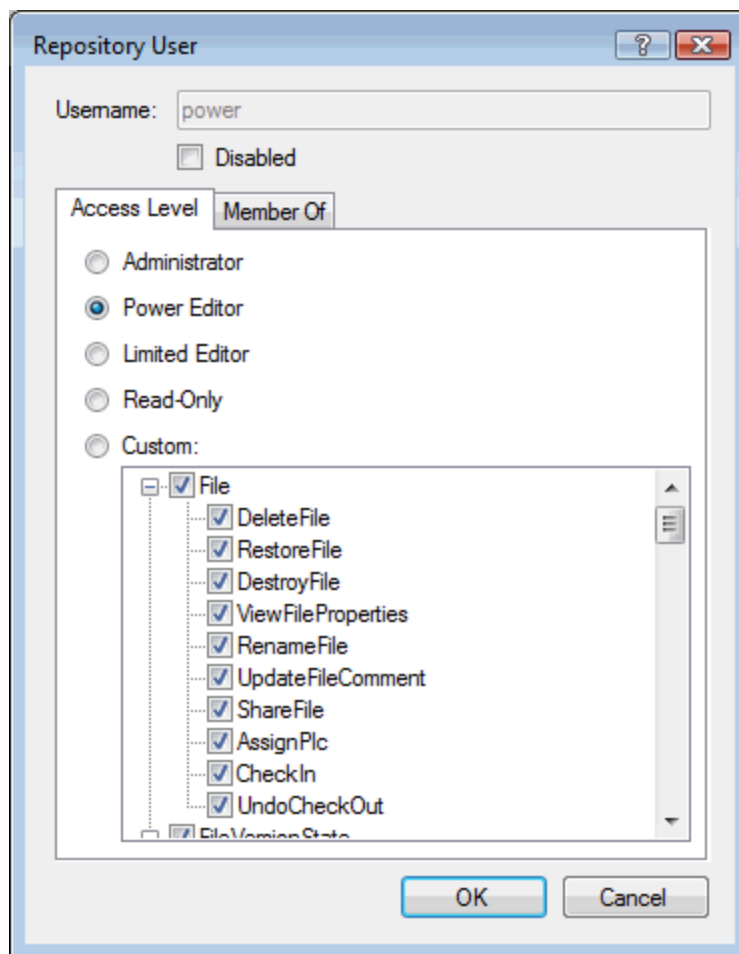
3. Select the account you want to add and click **OK**. The **Repository User** dialog box appears, which can be used to define the access permissions of the account.

**NOTE:** All accounts must first be added as SQL Server accounts under Server Security before they can be selected as repository accounts.

### *Managing User-Level Account Permissions*

To define the access permissions of an individual account:

1. From the Repository Security dialog box, select the account to edit and click **Edit**. The Repository User dialog box appears.



The **Access Level** tab contains pre-defined access levels that can be applied to a user quickly and conveniently. The permissions associated with these pre-defined levels are **Administrator**, **Power Editor**, **Limited Editor**, and **Read-Only**.

A Custom access level also exists so that repository administrators may define specific repository permissions for a user or group of users.

Account permissions can also be applied to a user by adding them to a repository group that already contains a defined permission set. Adding a user to a repository group is a great way to quickly define security levels to a large group of users with similar needs. FTVersionTrak provides you with a set of default groups based on the pre-defined access levels described earlier: Administrator, Power Editor, Limited Editor, and Read-Only.

**NOTE:** Repository accounts cannot be removed from within Repository Security. Account removal may only be accomplished within Server Security by an authorized server administrator. To deny an account access to a specific repository, disable the account.

Individual users may also be granted specific permissions via repository group membership; users may also be members of more than one repository group at a time. The actual set of permissions granted to any user in a repository is therefore the sum of all permissions granted either on an individual user basis, or via membership in any repository group. The full details of a user's group membership and permission set can be viewed in the **Member Of** tab of the Repository User dialog box.

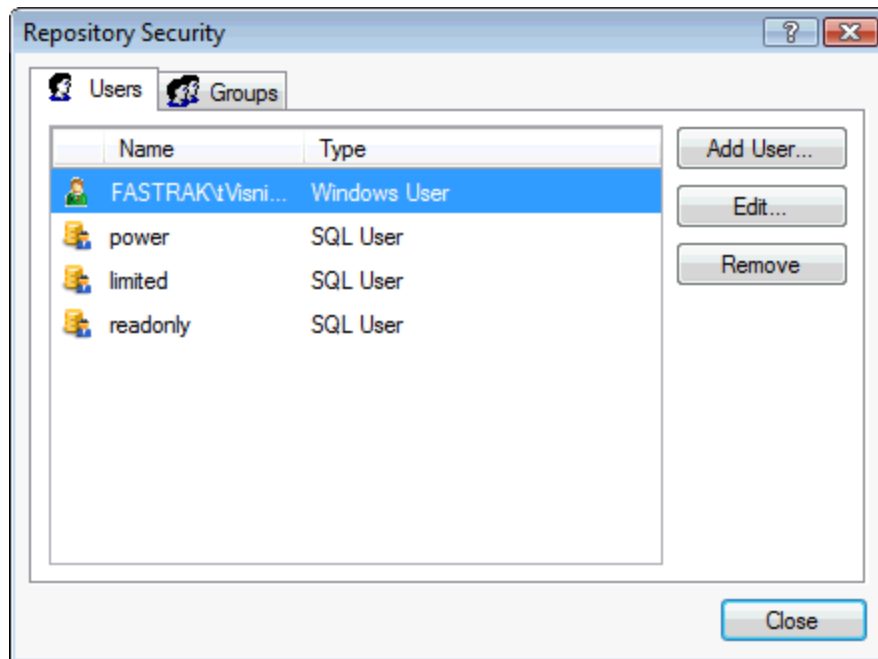
### ***Managing Repository Groups***

FTVersionTrak allows administrators to grant over 80 selectable permissions in 13 different areas of the software to each user in a repository. This powerful set of options gives administrators the ability to fine-tune the security policy they apply to the repositories they manage in order to maintain the strictest control over the sensitive files they manage, without hindering the productivity of the users who need access to those files. However, because of the sheer number of security options available, configuring each repository user with a unique permission set can be cumbersome, especially if the administrator is dealing with many, or perhaps hundreds, of users.

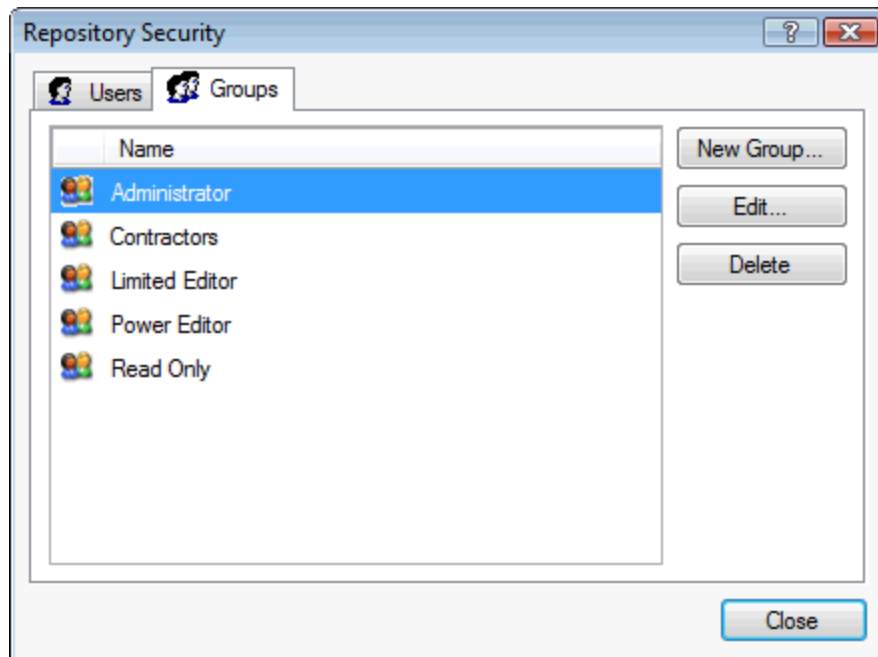
FTVersionTrak repository groups provide repository administrators with a simple, yet powerful, way to manage the security policy for a large set of users with varying access levels. With just a small amount of planning, administrators can create permissions-based groups that can meet the needs of every type of user in the organization.

#### **TO CREATE A REPOSITORY GROUP:**

1. On the Tools menu, click **Repository Security** or click the  toolbar button. The Repository Security dialog box appears.

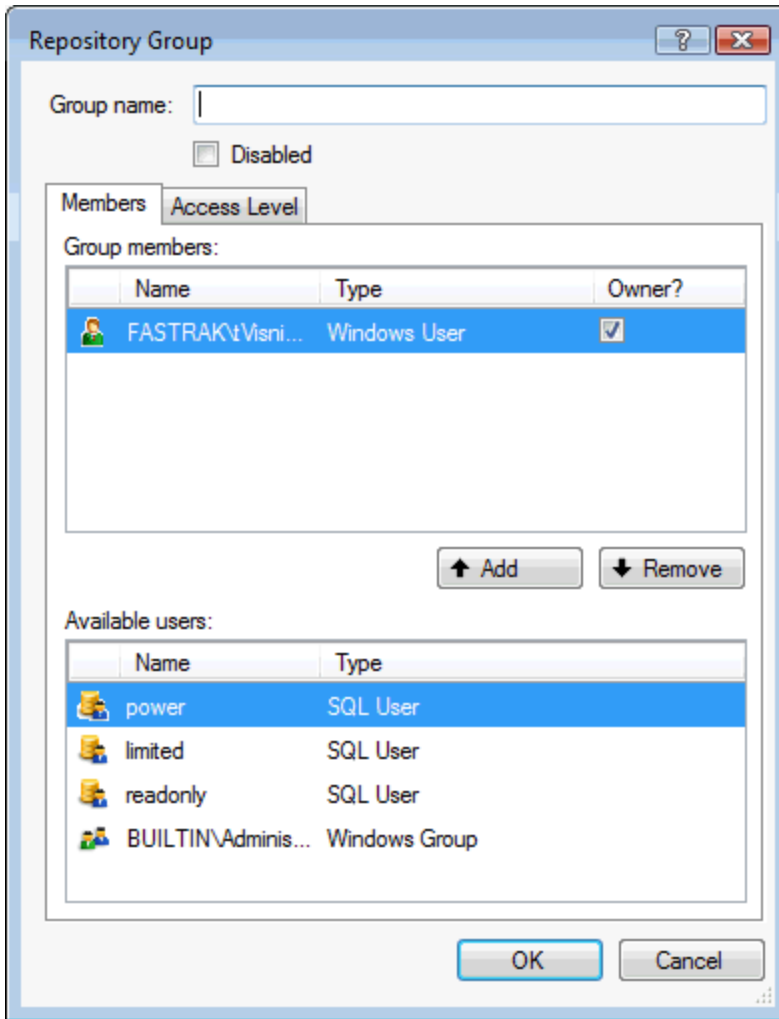


2. Click the **Groups** tab in the Repository Security dialog box. A list of existing repository groups appears. Four pre-defined groups are provided by default: **Administrator**, **Power Editor**, **Limited Editor**, and **Read Only**.



3. Click **New Group**. The **Repository Group** dialog box appears.

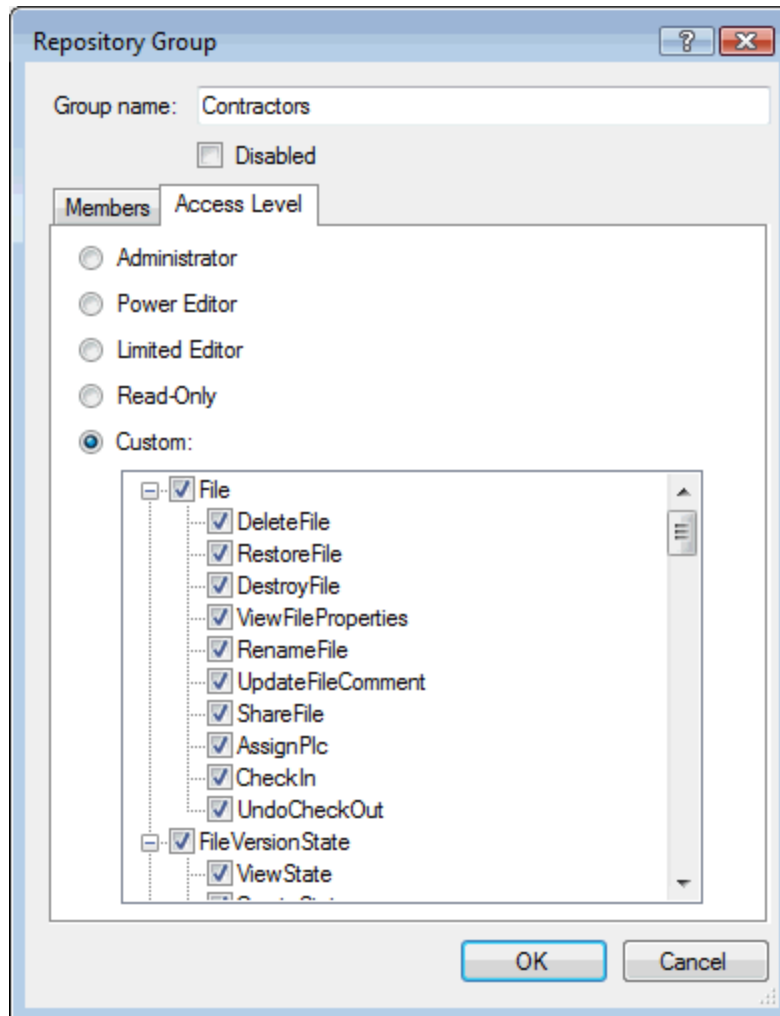




4. Enter a name for the group in the **Group Name** box. Depending on your security needs, you may want to create groups based on business unit (Maintenance, Engineering, Marketing, and so on) or employee type (Contractors, Management, and so on).
  
5. If you have repository users that you know will be added to the group at this time, you may select the users from the **Available Users** list at the bottom of the Repository Group dialog box (you can add additional users to the group at any time).

**NOTE:** Notice that there is already a user assigned to the group – this is the account of the repository creator, who is also the default administrator of the repository. The repository creator always has full permissions granted within the repository, and is always a member of every repository group. The repository owner is also by default the owner of the repository group.

6. Click the **Access Level** tab at the top of the Repository Group dialog box to define repository permissions for group members.



The Access Level tab contains pre-defined access levels that can be applied to a repository group quickly and conveniently. The permissions associated with these pre-defined levels

are **Administrator**, **Power Editor**, **Limited Editor**, and **Read-Only**. See **Repository Account Permissions** for more information about the permissions assigned to each access level.

A Custom access level also exists so that repository administrators may define specific repository permissions for the repository group.

**NOTE:** Individual users may also be granted specific permissions outside of group membership; users may also be members of more than one group at a time. The actual set of permissions granted to any user in a repository is therefore the sum of all permissions granted either on an individual user basis, or via membership in any repository group. The full details of a user's group membership and permission set can be viewed in the **Member Of** tab of the Repository User dialog box.

## Repository Access Privileges

A repository account permission is a right to carry out an operation on or applied to a resource within FTVersionTrak. These rights can be granted or revoked by a repository administrator. See the online help for more information about repository account permissions.


FTVersionTrak provides four default access levels with varying degrees of granted permissions: **Administrator**, **Power Editor**, **Limited Editor**, and **Read-Only**. These four access levels serve two purposes. First, they provide a quick and simple way to assign a pre-defined permission set to a user or group of users without having to grant each permission manually. Second, these default access levels provide administrators of earlier versions of FTVersionTrak a transition path to the new group-based security structure without requiring a complete redesign of the existing FTVersionTrak security policy. These four default access levels are carry-overs from previous versions of FTVersionTrak and will retain existing permissions from earlier versions of the software.

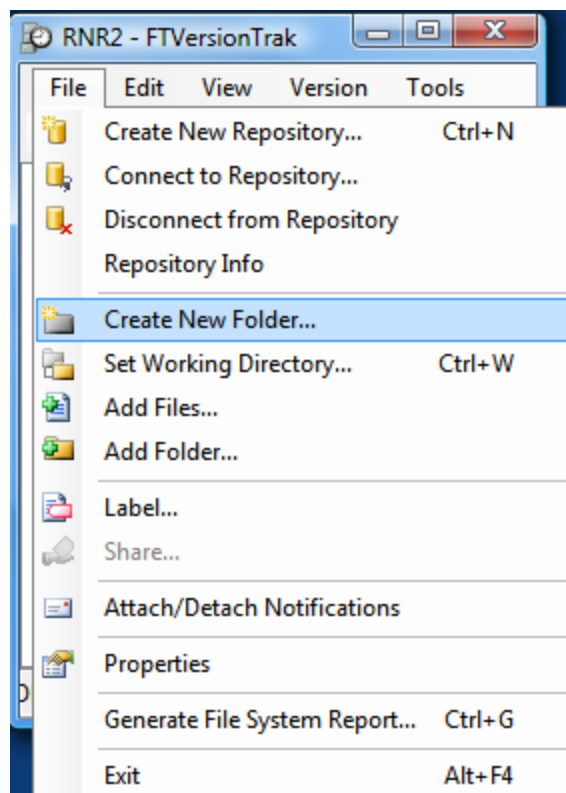
**NOTE:** Certain repository accounts, such as the account associated with the creator of the repository, will automatically be set to the Administrator access level and be granted all permissions. This account cannot be edited or deleted, to prevent against accidental removal of all accounts with administrative access.

# Adding Files and Folders to the Repository

Create folders in your repository to customize the repository's file structure and keep your repository files organized and easy to access.

To create a new repository folder:

1. Do one of the following:
  - On the **File** menu, click **Create New Folder**.
  - Right-click an existing folder and then select **New folder** from the short-cut menu.
  - Click the Create New Folder  toolbar button.




2. The default name of the created folder is *New Folder*. Type the new name of the folder within the highlighted text box and press **ENTER** when finished.

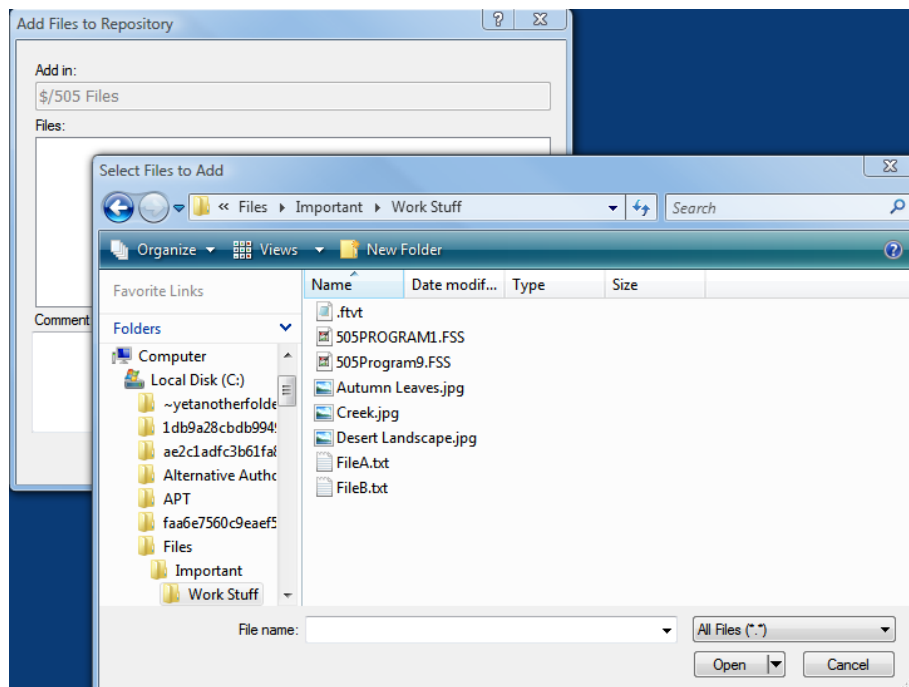
The left pane of the FTVersionTrak main window contains the folder tree. Similar in appearance to Windows Explorer, the folder tree is a listing of the folders in the repository.

The folder tree always contains a root folder, which by default is given the name \$ and cannot be deleted, destroyed or renamed. Subfolders of the \$ root folder may be created, renamed, deleted, and destroyed. When a folder is selected, the contents of the folder appear in the right pane of the main window, known as the file list. The file list displays files added to the repository.

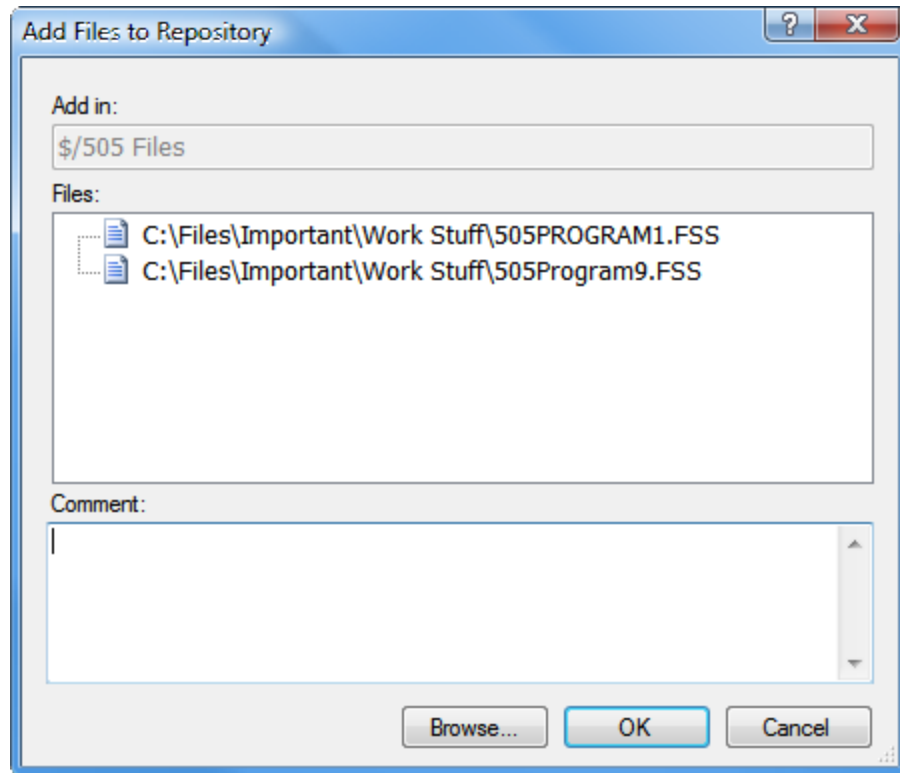
To add a file to the repository:

1. Do one of the following:
  - On the **File** menu, click **Add Files**.
  - Right-click an existing folder and then select **Add Files** from the shortcut menu.
  - Click the Add Files  toolbar button.

The Add Files to Repository and Select Files to Add dialog boxes are displayed.



2. In the Select Files to Add dialog box, browse to the files located on your computer that you wish to add to the FTVersionTrak repository. Press and hold down the **CTRL** key to select more than one file. Click **OPEN** when finished. After clicking **OPEN**, the following will occur:
  - The Select Files to Add dialog box is closed.
  - The files you selected will appear in the Add Files to Repository dialog box, under **Files**.



3. To continue browsing for files, click **Browse** in the Add Files to Repository dialog box.
4. If you want, type a comment in the **Comment** box. The comment will be applied to all of the files listed under **Files**.
5. Click **OK** to add the files listed under **Files** with the comment displayed under **Comment** to the repository.
6. Click **Cancel** to close the **Add Files to Repository** dialog box without adding files to the repository.

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