SiteCount Client Install

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Introduction

The SiteCount Client install allows you to access the data of a Central SiteCount Installation and generate dynamic reports while maintaining a single database to maintain. User permissions allow you assign the exact level of access for each Client installation.

Installation Requirements

General

- Internet Access *(used to register the software)*

- Valid SiteCount Serial Number
  Contact us at support@trafsys.com if you have not received a Serial Number

- .NET Framework: Version 2.0
  (http://go.microsoft.com/fwlink/?LinkId=55731)

                                                                                  Version 3.5
  (http://www.microsoft.com/downloads/details.aspx?FamilyID=AB99342F-5D1A-413D-8319-81DA479AB0D7)

Installation

The installer for the SiteCount Client Installation can be located at:
http://sw.trafsys.com/SiteCount/index.htm

It is assumed that SiteCount is fully installed and functional. If this is not the case stop now and complete this before proceeding with the Client installation

Launch the installer of the SiteCount Client. You will be prompted with a installation location and what users of this computer will have the software setup. If more than 1 person is expected to use the system on this computer select the **Everyone** option.

The setup will continue and will move the files to the proper location.

You will be presented with the following dialog.
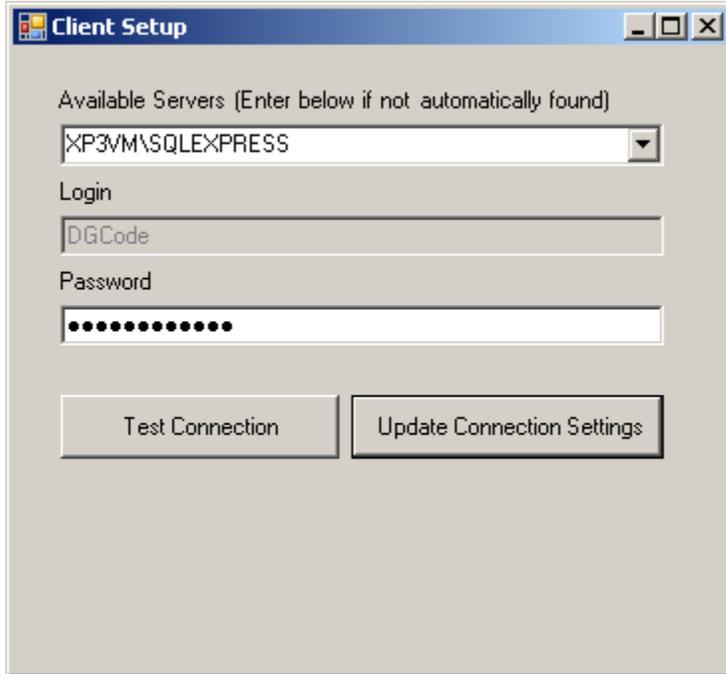
Here you will select the database that the Central SiteCount installation is pushing its data to. If you do not see the desired database server where your SiteCount is do not worry. This means that the server most likely doesn't have the **SQL Server Browser** service started. You can manually enter the proper location in this space.

The password field will contain the default password used for database connections. If you have changed this option when setting up SiteCount you will need to enter it here.

After you have made your selection use the **Test Connection** button to verify your settings.

After a **Connection Okay** response you can select the **Update Connection Settings** to save to file.

Next you will be presented with the SiteCount License dialog. Use the provided SiteCount License Number to complete the installation of the Client SiteCount.
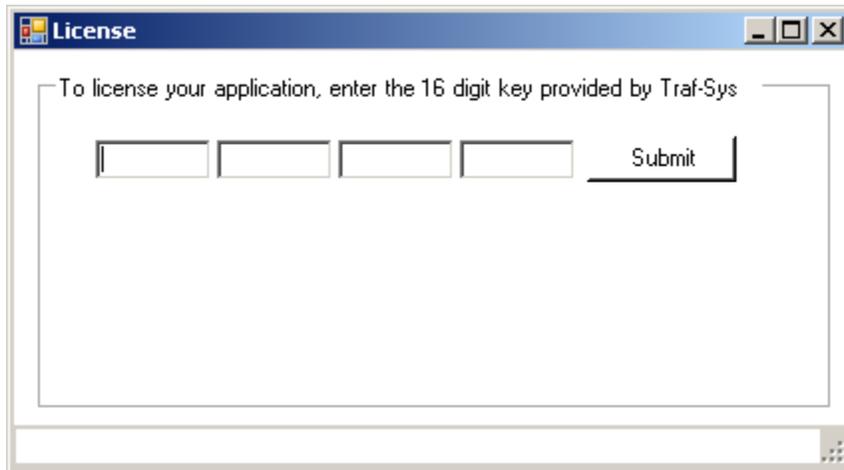
You can now access the new menu items from the start menu. When you first load an application you will be prompted for a user and password. This can be the admin user account that was created with the installation of SiteCount or you can follow along to create a new user account.

The Admin account will allow the Client to have full control over the system. This includes data from all sites and the ability to configure the system.

Creating New Users

Users are created from the **Data Entry** application. You will be required to use the admin user created during the installation of the central SiteCount Installation.

From within **Data** Entry go to the Users option at the bottom. Select Users and then select **New** to be presented with the following dialog.

Below the basic user setting for SiteCount are the Types of data, Permissions, and User Roles that you can assign to the user account.

The types of data are specific to each installation. All systems will contain Traffic data along with data types enabled in the system.

The Permissions will allow you to select the specific data that the user is enabled to view. The **Head Office** permission allows access to all sites within the system. Custom permissions will need to be created. Refer to the next section that goes through this procedure.

Admins allows uses to access the **Data Entry administration portion of Site**Count. This will allow the user to create and delete users, permissions, categories etc.

Report Consumers allows users access the Report Generator along with the Report Gallery. This role is generally used for all users that are given access to the system.

Sales Entry allows users to import daily sales. The sales are imported in either comma or tab separated lists

Traffic Editing allows for changes to be made to the traffic counts.

Event Entry allows for Special Events to be added and recorded.

Occupancy allows for Ins and Outs to be compared estimating a given occupancy.

Labor Entry allows for a user for staff hours to be entered and compared against traffic counts.

Create New Permissions

New permissions can be created from the **Data Entry** application. To access this application ensure that the Trafsys SiteCount user that is running this application has the Admin Role.

Once **Data Entry** application is loaded expand the **User** section along the left and select **Permissions**.

Permissions can be created individually by selecting **new** and making the following selections.

- o Name   Used to represent the new permission *(Generally the Site Name is used)*

- o Level   Site allows for individual site selection. Multiple Sites for more than one, All Sites, and Category which allows for user defined groups.

- o Sites   Used to select what sites the permission contains

The task of creating permissions for each site can be automated with the Bulk Permissions option along the right. This option will allow you to add/Remove Head Office permission, and create custom site permissions from location groups or categories.

Troubleshooting

Here are some solutions to common issues you may experience with the SiteCount Client Install.

When selecting my SQL server I am unable to get a successful connection.

Generally not being able to connect can be broken down into two types of issues.

1. Incorrect Connection Information
   - Check the Server Hostname and SQL Instance name where SiteCount is installed
   - Ensure the destination server is in the correct format
     HOSTNAME\SQL INSTANCE   *example* (XP3VM\SQLEXPRESS)

2. Computer configuration issues
   - Ensure Windows Firewall is turned **off** on the Central SiteCount installation
   - Verify that you can Ping the computer of the Central SiteCount Installation
     - o   If you are not on the same network as the Central SiteCount Install, you will not be able to use the Client Software

Contact Information

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