



**NaviiPlan**

**Software Setup Guide**

**QUICK START**





# **NaviPlan Quick Start Software Setup Guide**

**USA version 9.0**

EISI, Winnipeg

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## About this guide

This guide will help you install NaviPlan® software. Keep it handy for easy reference.

### Conventions used in the Quick Start guide

The Quick Start guide uses the following conventions:

- The names of items that are labeled on the screen are capitalized and italicized. For example,  
The *License Agreement* dialog box opens.
- In procedures, the names of items that you must select, click, or enter appear in bold. For example,  
Click **OK**, and then enter **Base Plan**.
- Multiple menu command instructions are listed together, separated by en dashes. For example,  
Go to the **Data** menu, and then select **Data – Client – Add Family Member**.
- Keyboard references appear in uppercase with keys separated by plus signs if they are to be pressed together. For example,  
CTRL+ALT+DELETE

## Finding more information

If you have a question that is not answered in this guide, there are other places you can look for more information:

### **www.eisi.com/**

Visit our Web site for

- online tutorials
- training information
- NaviPlan tips
- NaviPlan product news
- technical support
- support forums

### **Help**

The fastest way to get information about any command, dialog box, or item within NaviPlan is to use Help. There are four ways to access Help:

- Select the **Help** menu from the program's menu bar
- Right-click the **desktop**, and then click **Help** from the list that appears (this will not work if you have any dialog boxes open)
- Click the **Help** button in the top-right corner of any dialog box
- Select an item, and then press **F1**



### **Technical Support**

You can contact EISI Technical Support for more help.

- Visit [EISI User Services](#)
- Telephone: **(888) 692-3474** (Mon.–Fri., 7am–7pm Central Time)
- Fax: **(204) 975-3726**

# Installing and upgrading NaviPlan

This section describes how to install or upgrade NaviPlan and how to authorize it. Before you begin, review the system requirements.

## System requirements

Your computer system must have the following:

- Windows XP, or Windows Vista™
- Free hard disk space: 350MB
- CD-ROM drive
- Super VGA display with a minimum resolution of 1024 x 768 with 256 color palette
- Mouse or compatible pointing device

Operating system	Minimum processor & RAM*
Windows XP	<ul style="list-style-type: none"> <li>• Pentium® III 1.0GHZ* (P-IV 2.2GHZ+)**</li> <li>• 512MB* (1GB+) of RAM</li> </ul>
Windows Vista	<ul style="list-style-type: none"> <li>• Pentium® III 1.0GHZ* (P-IV 2.2GHZ+)</li> <li>• 1GB* (2GB+)</li> </ul>
Minimum version of Microsoft Word: 2000+*** Minimum version of Adobe Reader: 6.0+	Browser version: Internet Explorer 6.0 SP2+****

\*Minimum requirements will limit application performance and the use of some features.

\*\*Intel Pentium/Celeron family, AMD K6/Athlon/Duron, or compatible processor recommended.

\*\*\*Microsoft Word is only a requirement if reports are generated in .rtf.

\*\*\*\*Internet Explorer does not need to be the primary browser, but is used by NaviPlan.

## Installing on a stand-alone computer

This section explains how to install NaviPlan software on a stand-alone computer.

### Installing from the NaviPlan CD

The NaviPlan CD contains a full release version of the software. It also contains NaviPlan user guides, product order forms, and the installation program for Adobe Acrobat Reader, which allows you to view and print the documentation.

To install NaviPlan from the CD, follow these steps:

1. Start Windows, and then insert the NaviPlan CD into your CD-ROM drive. The *AutoPlay* window opens (if it does not, see "Troubleshooting the CD" on page 11).

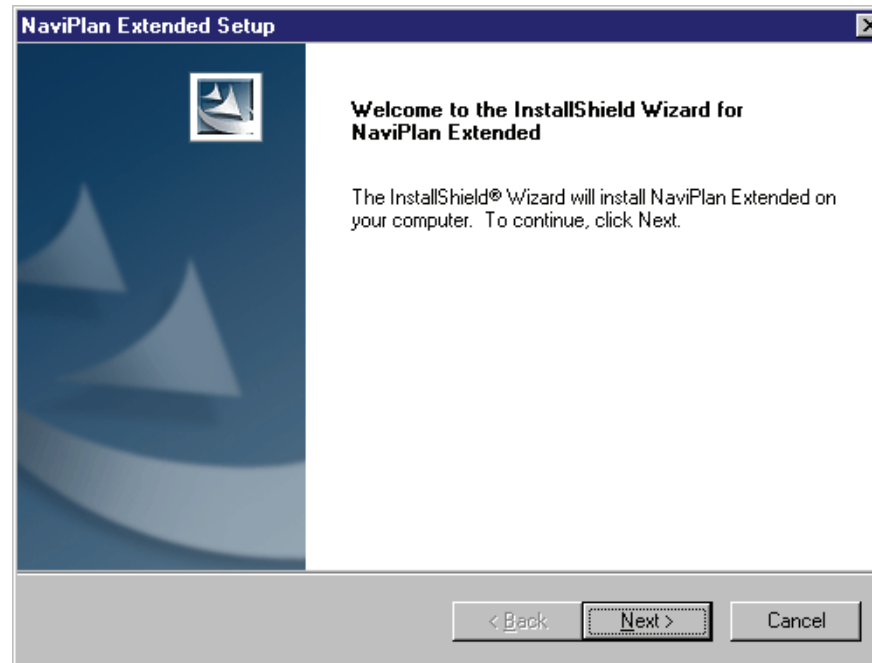
Click **Cancel** at any time to stop the installation process.

Windows Vista users: Right-click the **setup.exe** file in the *Setup* folder. Select **Run as administrator**, and then click **Continue**.



Figure 1: AutoPlay window

2. Select either NaviPlan **Standard** or NaviPlan **Extended** to display the program's option menu, and then click either **Install NaviPlan Standard** or **Install NaviPlan Extended**.



**Figure 2: NaviPlan Setup – Welcome dialog box**

3. Read the displayed information, and then click **Next** to continue the installation process. The *License Agreement* dialog box opens.
4. Read the License Agreement information carefully. If you accept the terms of the agreement, click **I accept the terms in the license agreement**, and then click **Next**.  
The *Choose Destination Location* dialog box opens.

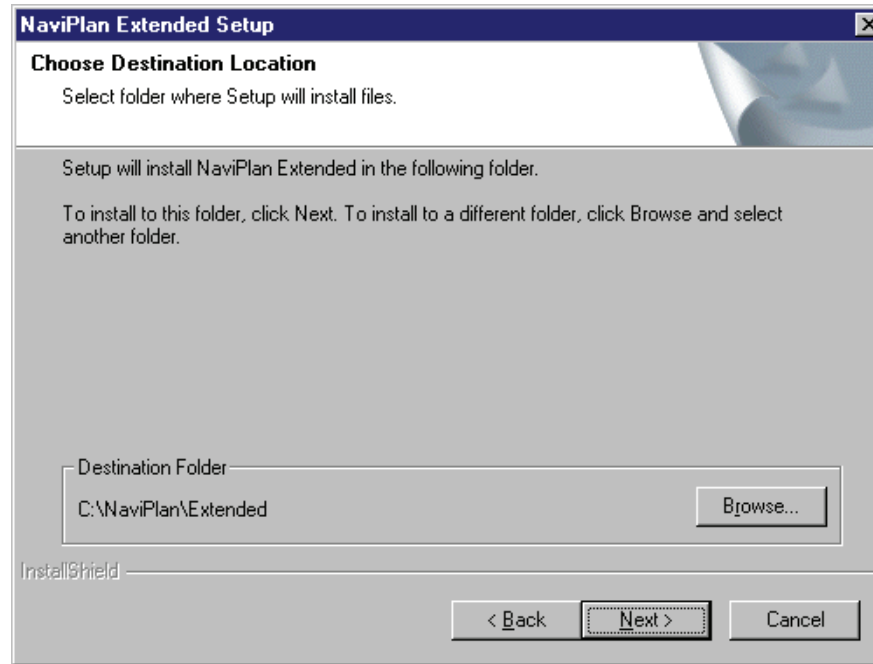


Figure 3: Choose Destination Location dialog box

5. Click **Next** to install the NaviPlan program files in the NaviPlan Standard or Naviplan Extended program folder.  
To install the NaviPlan program files in a different folder, click **Browse**. The *Choose Folder* dialog box opens.

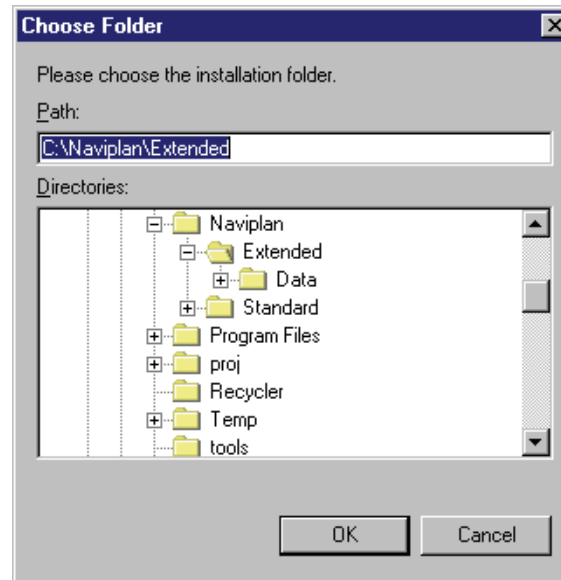


Figure 4: Choose Folder dialog box

Select or enter the path to the destination folder, and then click **OK**. The *Choose Folder* dialog box closes and you are returned to the *Choose Destination* dialog box. Click **Next** to continue the installation process.

The *Select Data Directory* dialog box opens.

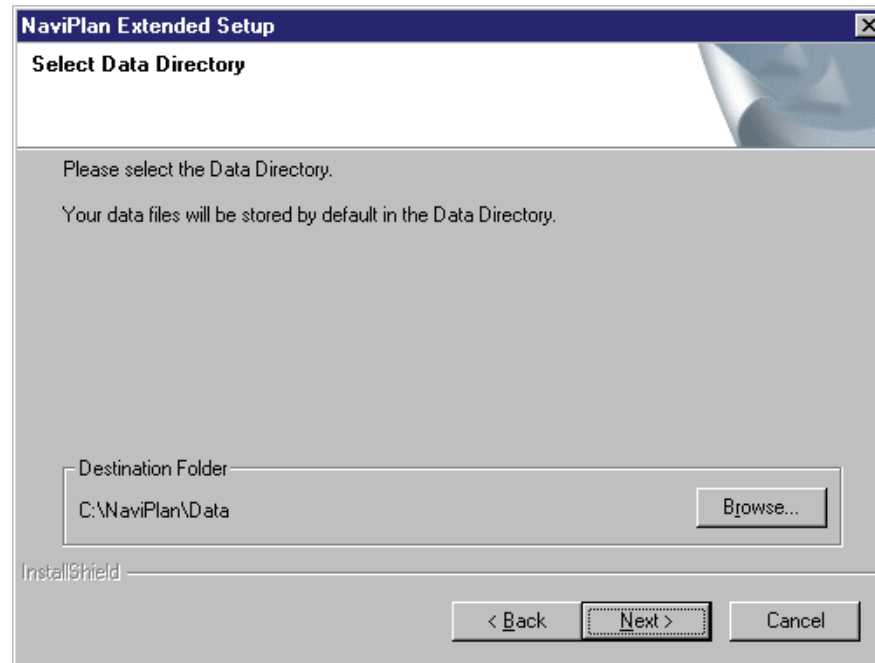
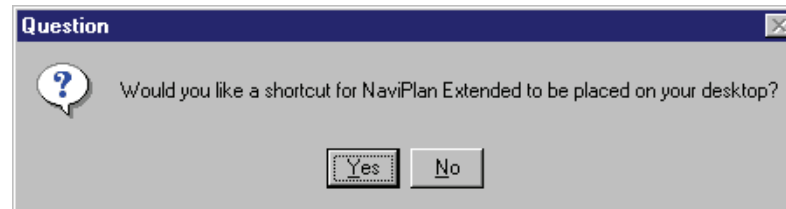


Figure 5: Select Data Directory dialog box

- To store your client files in a *Data* folder in the NaviPlan program directory, click **Next**.  
To store your client files in a different folder, click **Browse**. The *Choose Folder* dialog box opens.  
Select or enter the path to the destination folder, and then click **OK**. The *Choose Folder* dialog box closes, and you are returned to the *Choose Destination* dialog box.  
Click **Next** to continue the installation process.  
The *Setup Status* dialog box opens with a progress indicator that displays the status of each file as it is copied to your drive.

7. The *Question* dialog box opens to ask if you want a NaviPlan shortcut placed on your desktop. Click **Yes** or **No**.



**Figure 6:** *Question dialog box*

8. The *Question* dialog box closes and the *Install Shield Wizard Complete* dialog box opens. This dialog box may ask if you want to restart your computer.

If the question does not appear, click **Finish**. NaviPlan is now ready to use.

If you want the program to shut down all open applications and restart your computer, select **Yes**, and then click **Finish**. Your computer is restarted and NaviPlan is ready to use.

If you don't want the program to shut down all open applications and restart your computer, select **No**, and then click **Finish**. NaviPlan is installed, but you will be unable to use the application until you restart your computer.

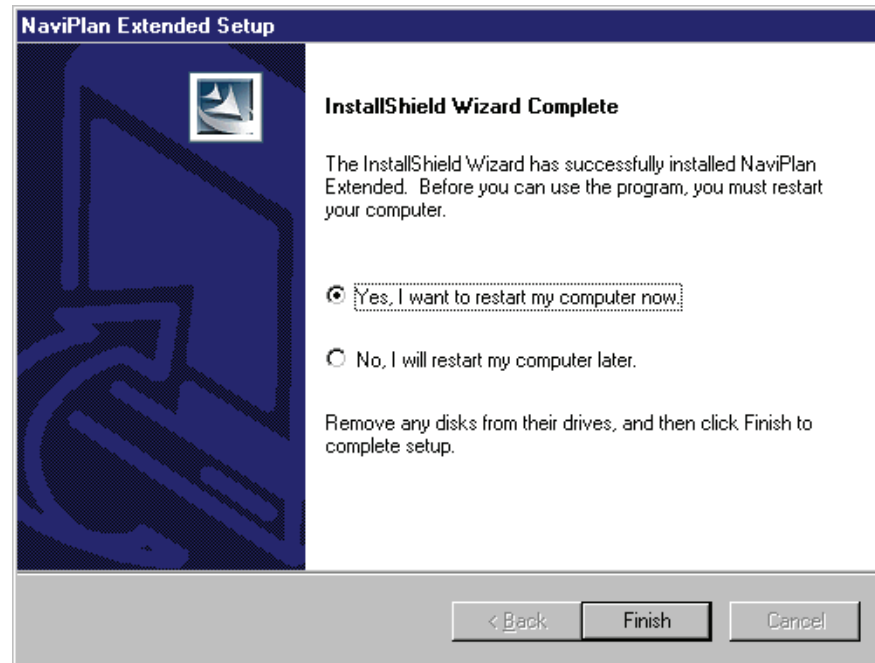


Figure 7: Install Shield Wizard Complete dialog box

## Troubleshooting the CD

The NaviPlan CD plays automatically when you insert the disk into your CD-ROM drive. If this does not happen, try the following:

- Remove the disk, and then reinsert it.
- Remove the disk and wipe it with a soft, dry cloth to remove fingerprints or paper dust. Reinsert the disk.

If the AutoPlay problems continue, it may be because your CD-ROM drive does not support AutoPlay, or the AutoPlay feature is disabled. In either case, try starting the CD manually:

1. Start Windows, and then insert the NaviPlan CD into your CD-ROM drive.
2. On the Windows taskbar, click the **Start** button, and then select **Run**. The *Run* dialog box opens.

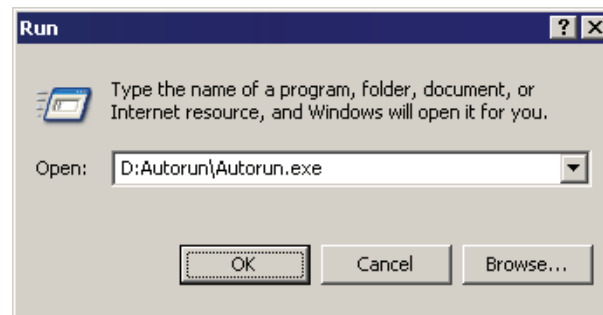


Figure 8: Run dialog box

3. In the *Open* field, enter **D:;Autorun\Autorun.exe** (replacing *D:* with the letter of your CD-ROM drive), and then click **OK**.

## **Installing on a network server**

If you are installing NaviPlan on a network server, contact Technical Support for instructions.

- Telephone: **(888) 692-3474** (Mon.–Fri., 7am–7pm Central Time)
- Fax: **(204) 975-3726**

## Authorizing NaviPlan

These instructions assume that you have already installed the NaviPlan program. If you are installing the program on your computer for the first time, there is a complimentary 30-day evaluation period. After this period expires, the software will not run until it has been authorized.

You can authorize the software during the 30-day evaluation period or you can wait until after the evaluation period expires.

1. Open NaviPlan and you will be prompted to authorize the software. If you do not see the prompt, go to the **File** menu, and then select **Security**. The *Security* dialog box opens.

The top section of the *Security* dialog box displays a unique *Site Code* that is generated based on your installed version. *This Site Code* is used to generate a unique authorization key for you.

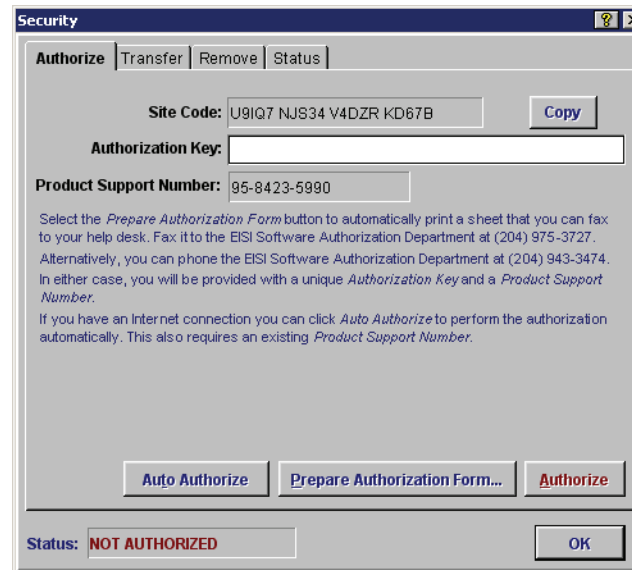


Figure 9: Security dialog box – Authorize tab (sample Site Code shown)

2. Use one of the following methods to obtain a unique authorization key from the EISI Customer Service department:
  - If you have an Internet connection and if a product support number is displayed, click **Auto Authorize**. Your installation is automatically authorized.
  - Telephone the Customer Service department at **(888) 692-3474** (Mon.–Fri. 9am–5pm Central Time). When asked, relay the *Site Code* displayed on the *Authorize* tab of the *Security* dialog box.
  - Click **Prepare Authorization Form**.  
The *Prepare Authorization Form* dialog box opens.
3. Complete all fields in the dialog box. In the *Other Comments* field, indicate whether you are authorizing your primary or secondary computer.
4. Click **Print** to print a form that you can fax to EISI. The form contains your unique Site Code along with EISI's phone and fax numbers.
5. Fax the form to EISI at **(204) 975-3726**. An *Authorization Key* will be sent to you.

The screenshot shows a Windows-style dialog box titled "Prepare Authorization Form". It is divided into three main sections: "General", "Contact", and "Other".

- General:** Contains three text input fields labeled "Name:", "Company:", and "Address:". The "Address:" field is split into two lines.
- Contact:** Contains three text input fields labeled "Phone:", "Fax:", and "E-mail:". Below these is a larger text area labeled "Other Comments: (e.g. shipping info, additional notes)".
- Other:** Contains a question "How do you want to receive your authorization?" with three radio button options: "Phone", "Fax", and "E-mail". Below this is "Preferred Media:" with two radio button options: "CD-Rom" (which is selected) and "Floppy Disk".

At the bottom right of the dialog box are two buttons: "Cancel" and "Print".

Figure 10: Prepare Authorization Form dialog box

6. Enter the *Authorization Key*. The product support number appears automatically.
7. Click **Authorize**, and then click **OK** to close the dialog box.

## Moving your Authorization Key



### CAUTION

Moving the *Authorization Key* at the wrong time voids the authorization and causes your software to become unusable!

In some situations you may need to move NaviPlan. For example, if you

- reformat your hard disk
- get a new hard disk or computer
- install the program on another computer

If you need to move NaviPlan for any reason, you must transfer the *Authorization Key* before moving the software. Otherwise the key is invalidated and your software becomes unusable.

A NaviPlan license agreement permits you to have NaviPlan authorized on two computers. To use NaviPlan on a third computer without acquiring another license, you need to transfer the *Authorization Key* from one of the authorized computers.

If you have any questions about your *Authorization Key*, call the Customer Service department at **(888) 692-3474** and select option **3** (Mon.–Fri., 7am–7pm Central Time).

To transfer an authorization key, follow these steps:

1. Prepare a floppy disk.
2. Transfer the key from the authorized computer to the floppy disk.
3. Transfer the key from the floppy disk to the unauthorized computer.

### Preparing a floppy disk to transfer an Authorization Key

To prepare a floppy disk to transfer an *Authorization Key*, follow these steps:

1. Open the unauthorized version of NaviPlan.
2. Go to the **File** menu, and then select **Security**. The *Security* dialog box opens.
3. Go to the **Transfer** tab.

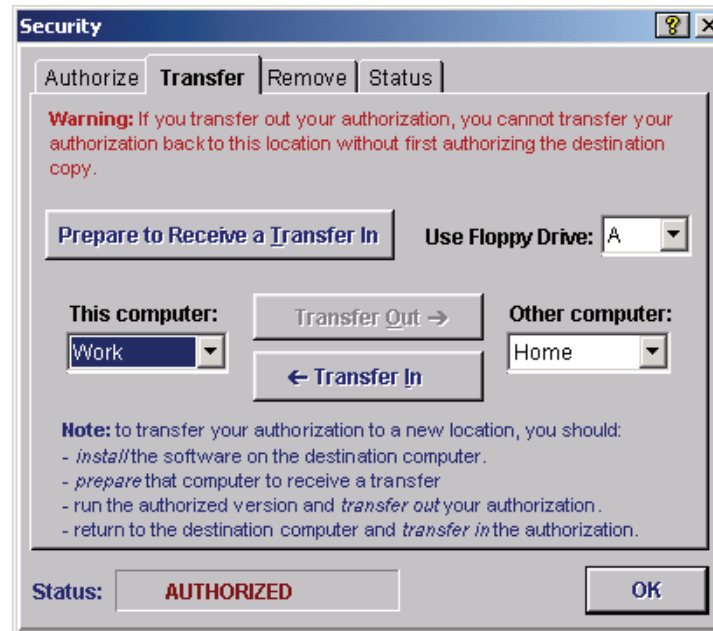


Figure 11: Security dialog box – Transfer tab

4. From the *This computer* list, select either **Home** or **Work**.  
When transferring an *Authorization Key* you must identify the authorized computer and the unauthorized computer as either *Home* or *Work*. If you are transferring the key between two computers (or two hard drives), and not between your home and work computers, then choose one computer (or hard drive) to refer to as home and one to refer to as work for the purpose of the transfer.
5. From the *Other computer* list, select either **Work** or **Home** (whichever one you did not choose in the previous step).
6. Insert a prepared floppy disk in the disk drive, and then select that disk drive from the *Use Floppy Drive* list.

7. Click **Prepare to Receive a Transfer In**. A message appears to notify you that the disk is ready to receive an authorization key.
8. Click **OK**. The message box closes.
9. Close NaviPlan and remove the disk from the drive.

### **Transferring an Authorization Key from an authorized computer to a floppy disk**

Before you can transfer an *Authorization Key* to a floppy disk, you must prepare the floppy disk to receive the key. For instructions, see "Preparing a floppy disk to transfer an Authorization Key" on page 16.

To transfer an authorization key from an authorized computer to a floppy disk, follow these steps:

1. Open the authorized version of NaviPlan.
2. Go to the **File** menu, and then select **Security**. The *Security* dialog box opens.
3. Go to the **Transfer** tab.
4. From the *This computer* list, select either **Work** or **Home** (the option you selected from the *Other computer* list when preparing the disk for the transfer).

When transferring an authorization key you must identify the authorized computer and the unauthorized computer as either *Home* or *Work*. If you are transferring the key between two computers (or two hard drives), and not between your home and work computers, then choose one computer (or hard drive) to refer to as home and one to refer to as work for the purpose of the transfer.

5. From the *Other computer* list, select either **Home** or **Work** (whichever one you did not choose in the previous step).
6. Insert a prepared floppy disk in the disk drive, and then select that disk drive from the *Use Floppy Drive* list.
7. Click **Transfer Out**. The *Authorization Key* is transferred to the floppy disk, and a message appears confirming the successful transfer.

8. Click **OK**. The message box closes and another one opens to ask if you want to prepare the floppy disk to transfer the *Authorization Key* back later.
9. If you are going to want to use this floppy disk to transfer the *Authorization Key* back to this computer later, click **Yes**. The message box closes and another message appears to notify you that the disk has been prepared.

If you are not going to want to use this floppy disk to transfer the *Authorization Key* back to this computer later, click **No**. The message box closes. Skip the next step.

10. Click **OK**. The message box closes.
11. Close NaviPlan and remove the disk from the drive.

### **Transferring an Authorization Key from a floppy disk to an unauthorized computer**

To transfer an *Authorization Key* from a floppy disk to an unauthorized computer, follow these steps:

1. Open the unauthorized version of NaviPlan.
2. Go to the **File** menu, and then select **Security**. The *Security* dialog box opens.
3. Go to the **Transfer** tab.
4. From the *This computer* list, select either **Home** or **Work** (the option you did not choose when transferring the key to the floppy disk).

When transferring an *Authorization Key* you must identify the authorized computer and the unauthorized computer as either *Home* or *Work*. If you are transferring the key between two computers (or two hard drives), and not between your home and work computers, then choose one computer (or hard drive) to refer to as home and one to refer to as work for the purpose of the transfer.

5. From the *Other computer* list, select either **Work** or **Home** (whichever one you did not choose in the previous step).
6. Insert the floppy disk containing the *Authorization Key* in the disk drive, and then select that disk drive from the *Use Floppy Drive* list.

7. Click **Transfer In**. A message appears to confirm that the *Authorization Key* was transferred successfully.
8. Click **OK**. The message box closes.
9. Click **OK**. The *Security* dialog box closes. This version of NaviPlan is now operational.

## Upgrading NaviPlan

It is best that you install the upgrade in the same location as your existing version of NaviPlan to avoid creating two separate installations. If you create two separate installations, each instance will potentially use its own data folder (depending on what you selected as the application and data folder locations). Also, once a client file has been opened in a newer version, it can no longer be opened in older versions.

### Updates and patches

NaviPlan now enables users to download updates and patches. This new feature enables quicker access to patches and software updates than was available in the past. The Update feature uses Microsoft .NET Framework to locate applicable patches.

To access the NaviPlan Update feature, go to the **Help** menu, and then select **Update**. Follow the on-screen instructions and NaviPlan Update will guide you through the process.

NaviPlan Update is only available if a current support agreement exists. You cannot download or install patch files after your support agreement expires.

### Major version upgrades

Before installing a major version upgrade, for example from version 8.0 to version 9.0, you must first uninstall the existing version. To uninstall, follow these steps:

1. In Windows Explorer, click the **NaviPlan Standard - Uninstall** or **NaviPlan Extended - Uninstall** icon in your NaviPlan directory. The *Install Shield Wizard* prepares to uninstall.
2. The question “Do you want to completely remove the selected application and all of its components?” displays. Click **OK**. The *Install Shield Wizard* uninstalls the application.
3. Click **Finish** to close the *Install Shield Wizard*.

After uninstalling the previous version, install the new version in the *same location* as your previous version of NaviPlan. The NaviPlan upgrade automatically updates the necessary files.

To install an upgrade, follow the appropriate installation procedure described earlier in this guide. For example, if you are installing an upgrade from CD onto a stand-alone computer, follow the instructions in "Installing from the NaviPlan CD" on page 4.

Your existing authorization should allow you to run the new version of NaviPlan. If you have any questions, contact the EISI Technical Support department at **(888) 692-3474** (Mon.–Fri., 7am–7pm Central Time).



## Modifying NaviPlan after installation

After installing NaviPlan you can modify some attributes of the application. For example, you can

- change the location where your client files are stored
- control whether or not NaviPlan creates backups of client files
- control how often NaviPlan saves client information

## Changing the word processor to which documents can be exported

Anytime you export a NaviPlan document, it is sent to the word processing application shown in the *Edit* field of the *Preferences* dialog box. At any time you can change the application shown here.

To change the word processor to which documents can be exported, follow these steps:

1. Open NaviPlan.
2. Go to the **Edit** menu, and then select **Preferences**. The *Preferences* dialog box opens, and the *General* tab is displayed.

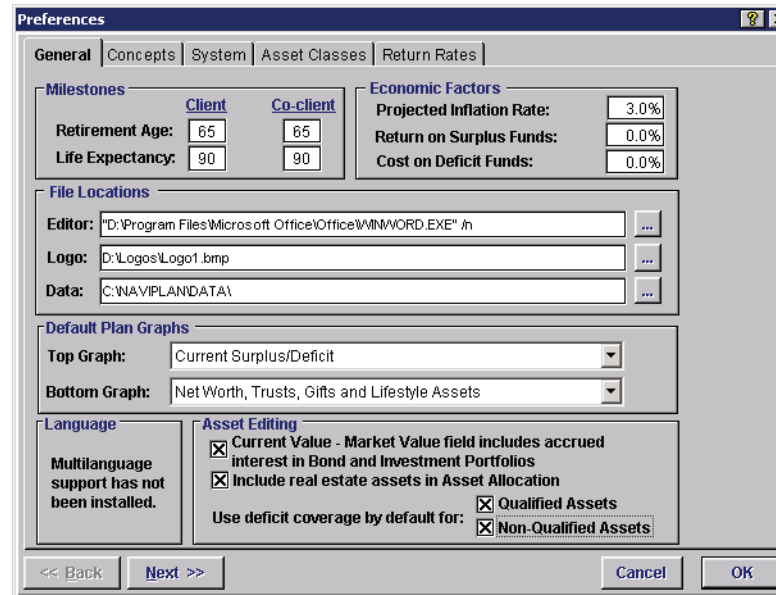


Figure 12: Preferences dialog box – General tab

3. In the *Editor* field, enter the path to the word processing application.

OR



Click the **browse** button to open the *Select Editor Program* dialog box where you can browse to the application. Click **OK** to close the dialog box.

4. Click **OK** to close the *Preferences* dialog box.

## Adding a logo to NaviPlan documents

You can select a graphic image to be used in various locations in NaviPlan. This includes such locations as the top of each concept (displayed only in *Reports* view), and the title page of the *Client Report* and *Client Presentation*. Graphics can be useful when you want to establish a consistent look for your printed or displayed materials.

The following graphic formats are acceptable:

- Windows bitmaps (BMP)
- Windows metafiles (WMF)
- Rich text format (RTF)

It is recommended that the dimensions of the image in the graphic file not exceed a maximum width of 4.5" and a maximum height of 2.5", otherwise the image on the left side of the page and the text under the logo will not be lined up properly on the page. It is also recommended that the physical size of the graphic file be kept as small as possible in order to keep the resulting output file a reasonable size. The larger the graphic file, the larger the resulting output file.

To add a logo or other graphic image, follow these steps:

1. Open NaviPlan.
2. Go to the **Edit** menu, and then select **Preferences**. The *Preferences* dialog box opens and the *General* tab is displayed.

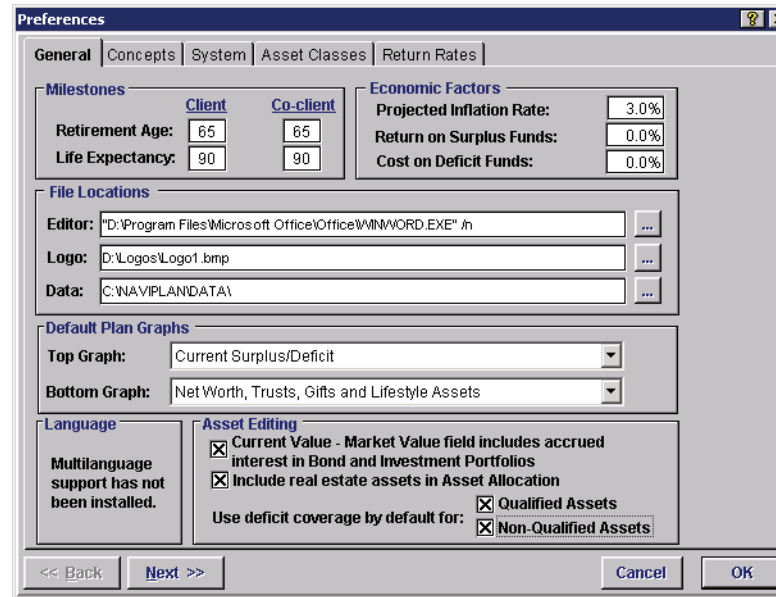


Figure 13: Preferences dialog box – General tab

3. In the *Logo* field, enter the path to the graphic file.

OR



Click the **browse** button to open the *Select Logo File* dialog box where you can browse to the graphic file. Click **OK** to close the dialog box.

4. Click **OK** to close the *Preferences* dialog box.

## Changing the location where client files are stored

To change the location where client files are stored, follow these steps:

1. Open NaviPlan.
2. Go to the **Edit** menu, and then select **Preferences**. The *Preferences* dialog box opens, and the *General* tab is displayed.

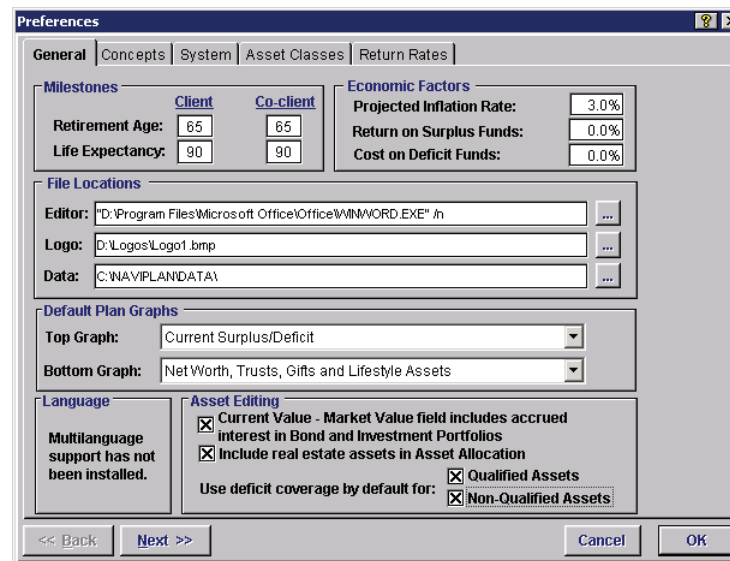


Figure 14: Preferences dialog box – General tab

3. In the *Data* field, enter the path to the directory where you want to store client files.

OR



Click the **browse** button to open the *Select Data Directory* dialog box where you can browse to the directory where you want to store client files. Click **OK** to close the dialog box.

4. Click **OK** to close the *Preferences* dialog box. From now on, client files will be stored in the new location.

## Changing NaviPlan system options

In the *Preferences* dialog box you can select the system options you want to use in NaviPlan. For example, you can choose whether or not NaviPlan should automatically open the last client file you were working on, the next time you run the program.

To change the system options, follow these steps:

1. Open NaviPlan.
2. Go to the **Edit** menu, and then select **Preferences**. The *Preferences* dialog box opens.
3. Go to the **System** tab.

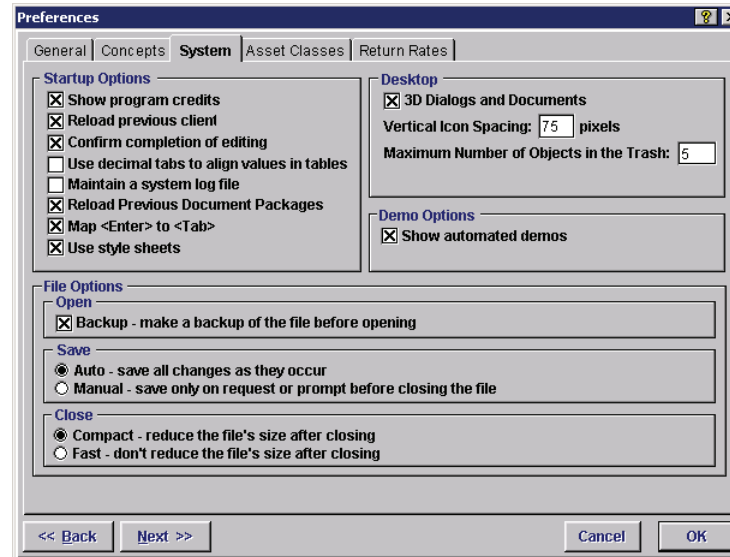


Figure 15: Preferences dialog box – System tab

For more information about changing system defaults, go to the **NaviPlan Standard Advanced Features Guide** or the **NaviPlan Extended Reference Guide**.

4. Select the check boxes next to the options you want to use, and clear the check boxes next to the options you do not want to use.  
If you want NaviPlan to create a backup copy of each client file before you open it, under *File Options* select the **Backup** option.
5. Click **OK**. The *Preferences* dialog box closes and your changes go into effect.



# Troubleshooting your installation

## Installation questions

### ***Why do I receive a "Code – 103, ref. 35054: NaviPlan cannot initialize its security sub-system" message after successfully installing the program?***

This message can appear for several reasons:

- The system may need to be restarted. Shut down your computer and restart it.
- You installed the program on a shared network drive. Most NaviPlan installations are stand-alone and must be installed on a hard drive local to the workstation. Reinstall to a local drive.
- You do not have sufficient privileges to install the CrypKey service. To determine whether or not the CrypKey service is running, go to the **Start** menu, select **Settings – Control Panel**, and then double-click the **Services** icon. The *Services* dialog box opens. Look for *Crypkey License* in the scroll box. If the CrypKey service is not running, obtain Administrator access to your computer (or the equivalent) and reinstall NaviPlan.

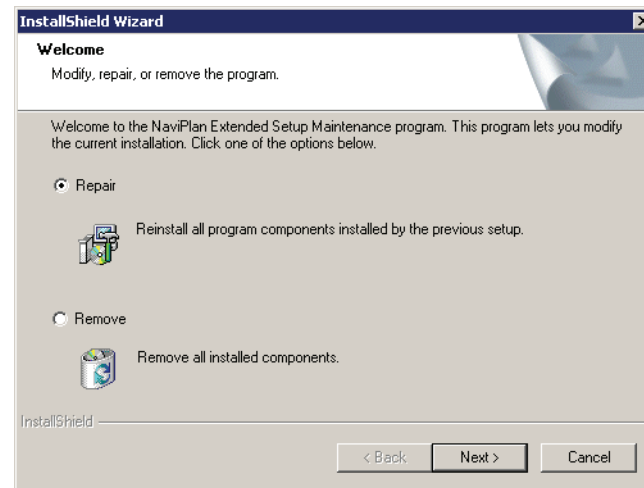
**Note:** If you are unable to resolve this error, call the EISI Technical Support department at **(888) 692-3474** for assistance.

## Upgrade questions

***I just installed an upgrade. Why do I now have two versions of the program on my computer?***

You installed the upgrade in a different location from your existing version of the program. Uninstall the upgrade and reinstall it in the same location as your existing version.

***The following dialog box displayed when I was installing an upgrade. Why did it display and what do I do now?***



**Figure 16: Install Shield Wizard Repair/Remove dialog box**

The dialog box displayed because the version you want to install is already installed on your computer.

You can

- Click **Cancel** and quit the installation since the version you want to install is already installed on your computer.
- Select **Remove** to uninstall the current installation. You can then continue with the installation.
- Select **Repair** to continue with the reinstallation.

## Authorization questions

### ***Why does the Status section of the Security dialog box still read Not Authorized even though I've entered my Authorization Key correctly?***

You must close the *Security* dialog box before the status section can be updated. The program is authorized when all of the menus appear on the menu bar at the top of the program window.

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