

# Installing Keystone on a Single Computer (Not on a Network)

## Installing Keystone - Overview

These sections will assist you with installing Keystone at your affiliate, whether you plan to install Keystone on a single computer or on an entire network. We suggest reading the installation instructions in order before you begin. This will help ensure that Keystone is installed correctly at your affiliate.

There are three installation types for setting up Keystone at your affiliate:

1. **Stand-alone** – Keystone will only be installed on one computer, and the database will not be shared with any other computer at your affiliate.
2. **Peer-to-peer network** – One computer on your network is used as a server from which you'll share your Keystone database and related files with other computers at your affiliate. In a peer-to-peer network, that designated server computer is typically also used as someone's day-to-day workstation. The Keystone program is then installed on each computer at your affiliate, and all of these computers will share the database and files located on the computer designated as the server.
3. **Server-based network** – One computer on your network is set up to share your Keystone database and related files with other computers on your network, *and* that computer is not used as a workstation for anyone at your affiliate. When Keystone is installed on the first computer on your network, the database and related files are automatically installed on the server (generally Keystone programs are not installed on the server). The Keystone program must then be installed on each of the other computers at your affiliate; all of these computers will share the database and files already located on your server.



While some affiliates use Keystone on Remote Desktop/Terminal Service networks, the installation of Keystone using Remote Desktop/Terminal Services has special requirements that are beyond the scope of this document.

Computers running Keystone in any of the above configurations can have a single user or multiple users with different usernames and passwords sharing Keystone on the same computer. The first time Keystone is installed on any of these computers (referred to as the 'Primary Install'), the setup program asks questions that are then used to configure all installations on that computer. The answers to these questions are stored so that if additional users are later added to the same computer (referred to as 'Secondary Installs') these questions are not asked again, which makes the installation of additional users on the same computer easier.

Keystone installs several sets of folders and files. Some are installed once per affiliate (shared backend files), some are installed once per computer (shared frontend files), and some are installed once per user (user-specific files). The Keystone install program creates *MoreThanData* folders in each area it needs to store files and gives each of these a special suffix to indicate their location:

Folder Name	Contents of Folder
MoreThanData	User- specific files that are stored in a more accessible folder, typically in the user's My Documents folder, that allow users to store files or folders that may aid their use of Keystone if they wish.
MoreThanDataUSR	User-specific files limited to that user such as a user's settings, favorites, etc.
MoreThanDataSBE	Shared Backend (e.g., Keystone database, Help library, templates, documents, backups)
MoreThanDataSFE	Shared Frontend (Keystone files shared with users on that computer)
MoreThanDataPF	Keystone Program Files

These folders are placed in different locations depending on the type of installation you perform and your computer configuration (the version of Windows you are running and whether it's 32-bit or 64-bit). During installation, you will see a File Map that shows you where your folders and files will be placed. This File Map is saved in your *My Documents\MoreThanData\Keystone* folder for future reference.

After installation, the easiest way to find these folders is to open the Help tab in the Keystone ribbon and click *Summary* (above *System Information*). On the System Information - Summary screen, click the arrow button to the right of the folder you want to open.

## Backend Folders and Files

*Shared Backend* – These folders and files are shared by every Keystone user. They include *Keystone Data*, which holds all the common data; the *Templates* folder with all of your Keystone templates; the Help library; backup files; and the *Keystone Documents* folder, which stores your family partner, house, and contact pictures and documents, etc. The Shared Backend files are installed once per affiliate during the first installation of Keystone.

## Frontend Folders and Files

*Shared Frontend* – These files are shared by all users on the same computer. They include the Keystone program files. These files are installed once per computer.

*User-Specific* – These files hold user-specific data and include settings and preferences, such as the user's list of favorite reports. They are installed once per user.

*Program Files* – These are files used to load and run MoreThanData software applications. These files are shared by all users on the same computer and include icons, report headers, and other files accessed by the programs.

If you have any questions on the installation process, please contact [MTD Support](#) and resolve these questions before installing Keystone. Failure to install the program correctly may result in loss of data or a corrupted database.

## Reminders for All Installations

### Before You Install



You must log in to Windows with a user account that has Administrator-level privileges in order to install Keystone. Attempting to install Keystone with any other type of account will cause errors during installation. You can see the type of account you have by choosing Start > Control Panel in Windows and opening the User Accounts control panel. For more information, refer to Windows Help.



Before you start, you should make sure every computer you intend to install Keystone on meets the prerequisite [System Requirements](#).

### Verifying Your Version of Microsoft Access and Windows



Before you install Keystone on any computer, make sure each computer you plan to install Keystone on is running the most current version/Service Pack of Microsoft Windows 7, or Windows 8 (8.1), *and* the most current version of Microsoft Office 2013 Professional, Microsoft Office 2010 Professional or any Office 2007 suite that includes Microsoft Access.

You can check which version of Windows you are running by choosing Run. Then type *winver* in the window that appears. One of the following windows will then appear showing you what version of Windows you have installed.



*Windows 7 - Version Information*



*Windows 8 (8.1) - Version Information*



It is important to determine which version of Microsoft Office you have on your computer - and on each computer you plan to use Keystone - before installing Keystone.

**If you do not have a version of Office 2007 with Microsoft Access, Office 2010 Professional or Office 2013 Professional, you will need to obtain and install one of these before you can install Keystone.** Affiliates can purchase Microsoft Office at very affordable prices from [TechSoup](http://www.techsoup.org) (<http://www.techsoup.org>), which provides software to non-profits at very substantial discounts.

*To verify that Microsoft Access is installed on a Windows 7 computer*

1. Choose All Programs from the Start Menu in Windows.
2. Open the folder for Microsoft Office - which will show all the Office applications on your computer then locate and click on the Microsoft Office Access shortcut to verify that Access is installed and activated.

If you don't see Microsoft Office Access in this list of Office programs, it most likely hasn't been installed on your computer, and you'll need to install it before you can install Keystone.

*To verify that Microsoft Access is installed on a Windows 8 (8.1) computer*

1. Go to the Windows Apps screen using the Windows button on the bottom left corner of the desktop.
2. Locate and click on the Microsoft Office Access shortcut to verify that Access is installed and activated.



Keystone will only run properly if you have installed Microsoft Office 2013, Professional, Microsoft Office 2010 Professional or any Microsoft Office 2007 suite that includes Microsoft Access.



If you have one of these versions of Office but did not previously install Microsoft Access, Word, Excel, and Outlook from the Office 2007, Office 2010, or Office 2013 installers, stop here and install whichever programs are missing before proceeding.



Make sure Microsoft Access is closed on your computer before beginning the Keystone installation.

## Keystone Shortcuts

The Keystone installer creates two shortcuts both on your Windows Desktop. One shortcut will launch the Keystone Program (  ), and the other will open your Exported Data file (  ), which will contain any data you choose to export from Keystone for labels, merge letters, analysis, and so forth. However, you can remove these shortcuts if you don't plan to use them.

If you are going to be installing Keystone on a computer that is on a peer-to-peer or server-based network then refer to the separate document [Install\\_Keystone\\_72\\_Network](#). If you will be installing Keystone on a stand-alone computer then proceed to the next section in this document.

## Installing Keystone on a Single, Stand-Alone Computer

For a stand-alone installation, Keystone will only be installed on one computer. There can be multiple users on that single computer, but the database will not be shared with any other computer at your affiliate. If you wish to use Keystone over a network, see the [Installing and Sharing Keystone on a Network](#) section.

### Before You Install



You must log in to Windows with a user account that has Administrator-level privileges in order to install Keystone. Attempting to install Keystone with any other type of account will cause errors during installation. You can see the type of account you have by choosing Start > Control Panel in Windows and opening the User Accounts control panel. For more information, refer to your Windows Help.



Before you start, you should make sure every computer you intend to install Keystone on meets the prerequisite [System Requirements](#).

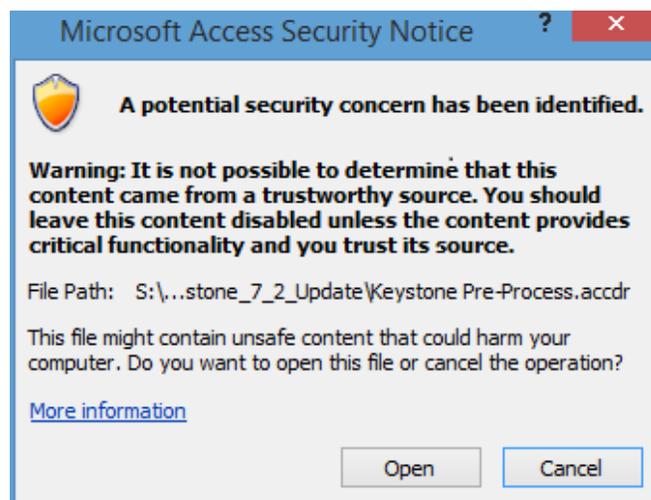
### Primary Install

When you're only installing Keystone on a single, stand-alone computer, 'primary install' refers to the first time you install Keystone on that computer. If you only have one Windows user account on that computer, then once you perform the primary install, you're done. If you have multiple people who will be using Keystone through different Windows user accounts on that computer, you will need to perform 'secondary installs' of Keystone for each of those users after you complete the primary install. See the [Secondary Installs](#) section for more information.



If you plan to use Keystone over a network at your affiliate, do not use these instructions. Instead, see the [Installing and Sharing Keystone on a Network](#) section.

1. In order to insure that the Mapped location of your database can be found, you must execute the *Keystone Setup Pre-Process.accdr* program on your computer before initiating the installer. The program can be copied from the ZIP file to your desktop and executed from there. When the install is complete, the *Setup.exe* program will delete the *Keystone Setup Pre-Process.accdr* program from you desktop, if it was executed from there. The *Keystone Setup Pre-Process.accdr* may require permission to run.



Select "Open" to execute the program.

2. If you downloaded the Keystone Setup zip file from the MTD web site, unzip it by right-clicking on that file, choosing *Extract All...*, and extracting the contents of the zip file to your computer. The contents include a file whose name ends in *Setup.exe*. Double-click on this file to start the installer.



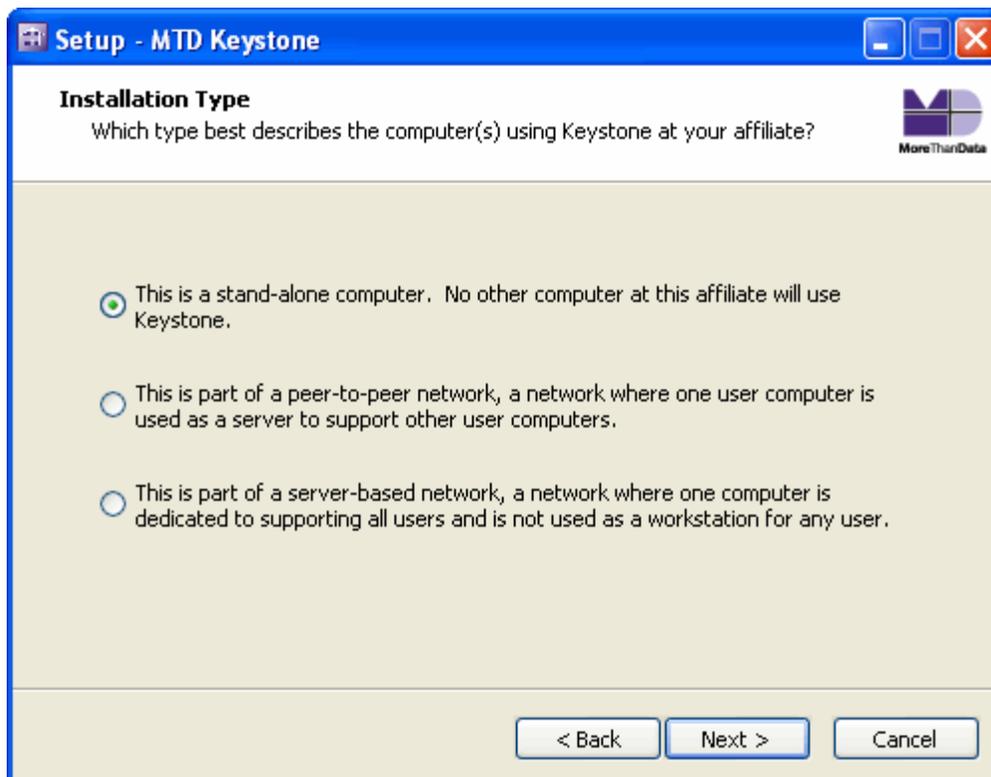
If you plan to install Keystone for additional users on this computer, Put the *Setup.exe* and *Keystone Setup Pre-Process.accdr* files either on a CD, a flash drive, or somewhere on your network (such as in the shared folder you created above for Keystone) so you can easily use them to install Keystone on other computers or for other users.

If you do not have Internet access and you are installing from a Keystone CD sent to you by MoreThanData, insert the CD and wait for the installer to launch. If the installer does not start automatically, go to your CD drive and double-click the *Setup.exe* file to launch it manually. There is also a Subscription File on the CD. Put this file in your My Documents folder before you install Keystone.

After you open the installer, you will see a warning message asking you if you trust this program to modify your computer. Choose to trust the installer. The installer then launches, and the Setup window appears.

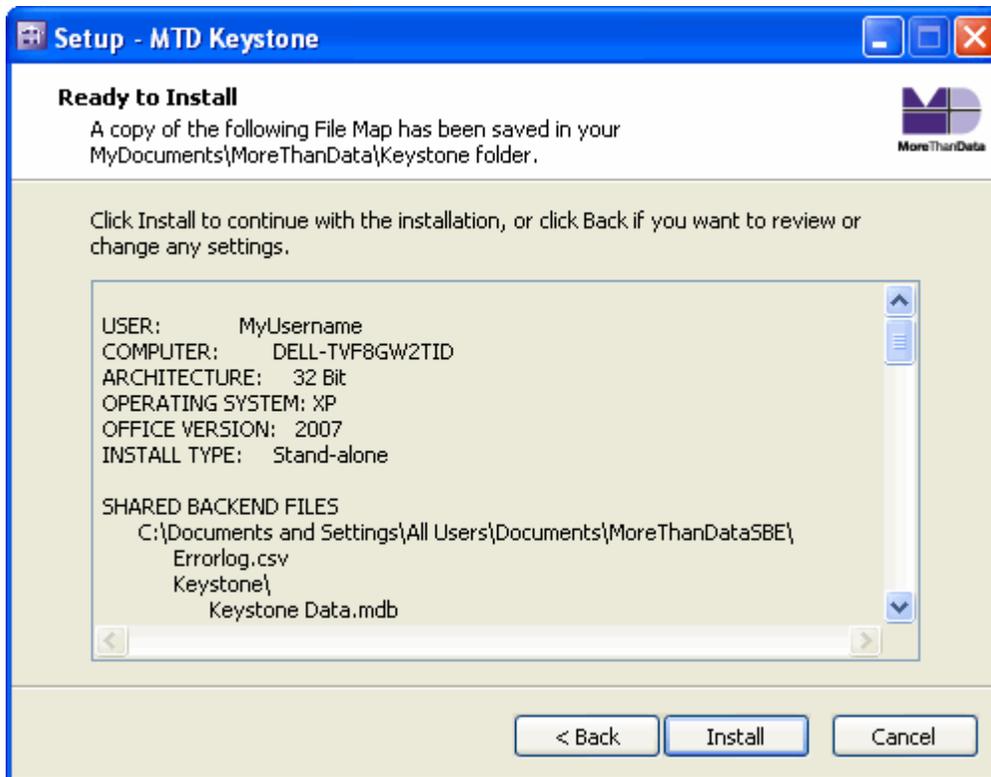


3. Continue through the initial installation steps by following the on-screen prompts and clicking **Next** at the bottom of each screen.
4. When you get to the *Installation Type* screen, choose "This is a stand-alone computer." then click **Next**.

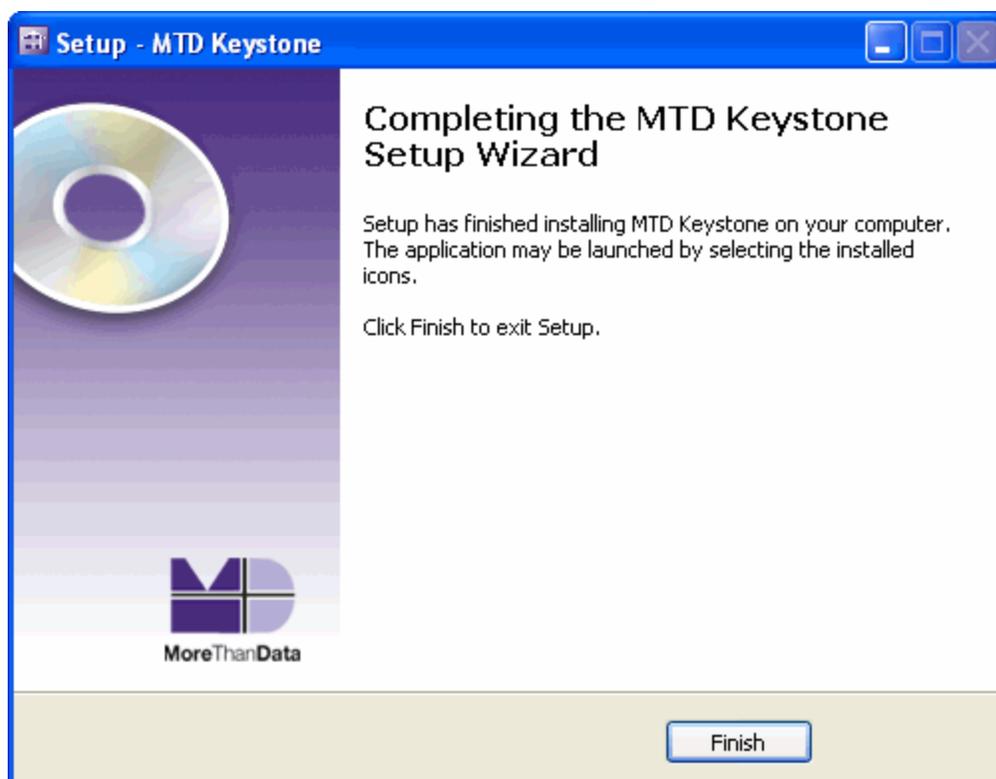


- The next screen is the *Ready to Install* screen with a file map showing the locations where every Keystone-related file will be stored. You can also find this information in the *File Map.txt* file in your *My Documents\MoreThanData\Keystone* folder. You can print this file from that location after the installation is complete and keep it for future reference.

Click the **Install** button to start the installation process.



- Once Keystone has completed the installation, click **Finish** when you see the following screen:



7. If you need to install Keystone for other Windows users on this computer, see the [Secondary Installs](#) section.

 The default password for Keystone is *Keystone*. The default password for Affiliate Setup is *Administrator*.

After you first install Keystone at your affiliate, start Keystone and enter the default password *Keystone*. Keystone then asks for your affiliate's Tax ID (EIN). Enter your EIN, and then choose whether you are going to use the Internet for downloading products and managing your MTD Keystone subscription.

 Unless you do not have any access to the Internet, we highly recommend enabling Internet access for Keystone.

MTD/Keystone Internet functionality includes the ability to:

- Download products and updates from the MTD web site
- Update your Keystone subscription
- Receive MTD News
- Access training videos on the MTD web site
- Access the MTD Help Center
- Access the MTD User Forum
- Access Remote Support from Keystone
- Send e-mails to contacts and family partners from Keystone
- Send system statistics to MTD

If you respond that you do not plan to use the Internet, the above functionality will not be available and MTD will need to plan to send you product and subscription updates via physical files on a CD in the future. Please notify [MTD Support](#) if you will not be using the Internet functions with Keystone.

 When you start Keystone, the *Last ScanDb* date on the Start Screen will be displayed in red until you run ScanDb. To do this, open the Tools tab in the Keystone ribbon and click *ScanDb*.

## Secondary Installs

Many affiliates have several users or volunteers who share a single computer, with each logging on to the computer under a different Windows username and password. This allows each person to have his or her own user profile and custom settings.

If there will be multiple Keystone users on a single computer using separate Windows user accounts, you must perform secondary installs of Keystone for each user after the primary install. This involves logging on to the computer under each Windows username to install Keystone.

-  You will need to temporarily set each Windows user's account type to Administrator - if they aren't already - in order to install Keystone correctly. If you attempt to install Keystone for a user with Limited or Power User access, Windows will not allow the installer to create the necessary files for each user, and the installation will fail.

For instructions on performing the primary install, see the [Installing Keystone on a Single, Stand-Alone Computer](#) or the [Installing and Sharing Keystone on a Network](#) sections.

### To temporarily change the User Account type

1. Log in to Windows using an Administrator-level account.
2. Click the Start button (bottom left) then choose *Control Panel*.
3. Open the *User Accounts* control panel.

From here, the instructions depending on what version of Windows you are using.

*For Windows Vista and Windows 7:*

- a. Select *Manage Another Account*.
- b. Choose the account you want to change.
- c. (Windows 7 only) Select *Change the account type* from the list of account options.
- d. Set the new account type to *Administrator*, and click the **Change Account Type** button.

-  Remember to repeat these instructions and reset the user's account type back to its original setting once you've completed the secondary install for that user.

### To perform a secondary install

Since much of Keystone is already set up on the computer from the primary install, secondary installs require fewer steps.

1. Log in to Windows as the user you wish to install Keystone for.
2. Open the *Setup.exe* installer file.  
If you saved this *Setup.exe* file to a CD, flash drive, or a network drive when you performed the primary install, you can simply double-click on that file to start the installer.

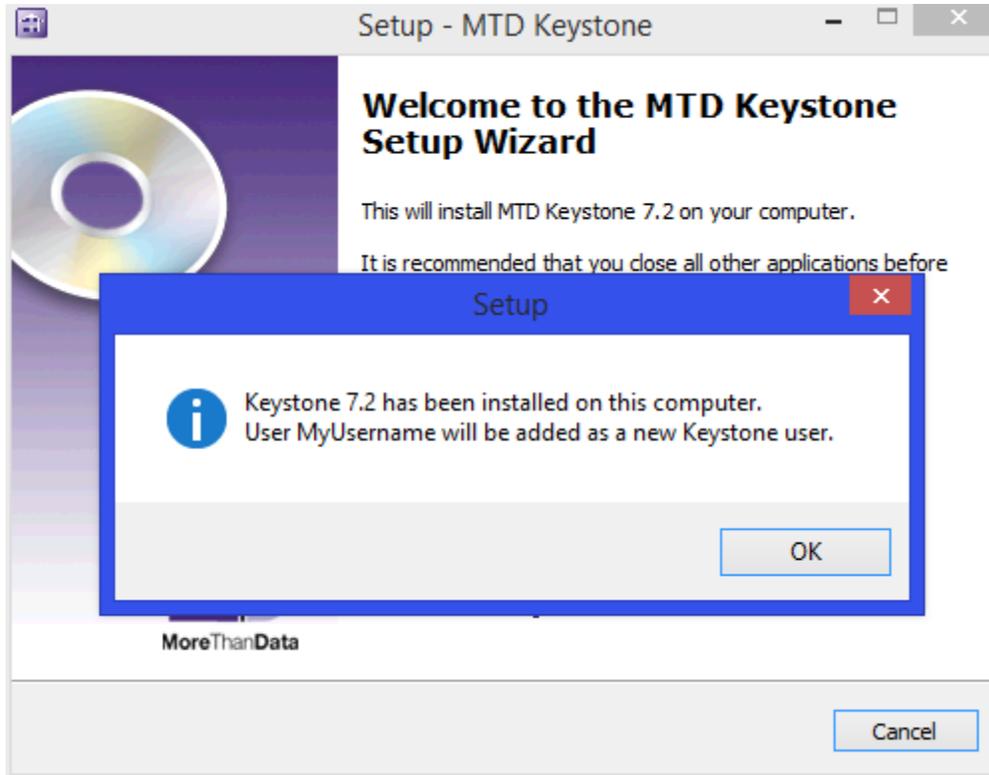
If you re-downloaded the Keystone Setup zip file from the MTD web site, unzip it by right-clicking on that file, choosing *Extract All...*, and extracting the contents of the zip file to your computer. The contents include a file whose name ends in *Setup.exe*. Double-click on this file to start the installer.

If you are installing from a Keystone CD sent to you by MoreThanData, insert the CD and wait for the installer to launch. If the installer does not start automatically or if the CD is still in the

computer from a previous installation, go to your CD drive and double-click the *Setup.exe* file to launch it manually.

After you launch the installer, the Setup window then appears.

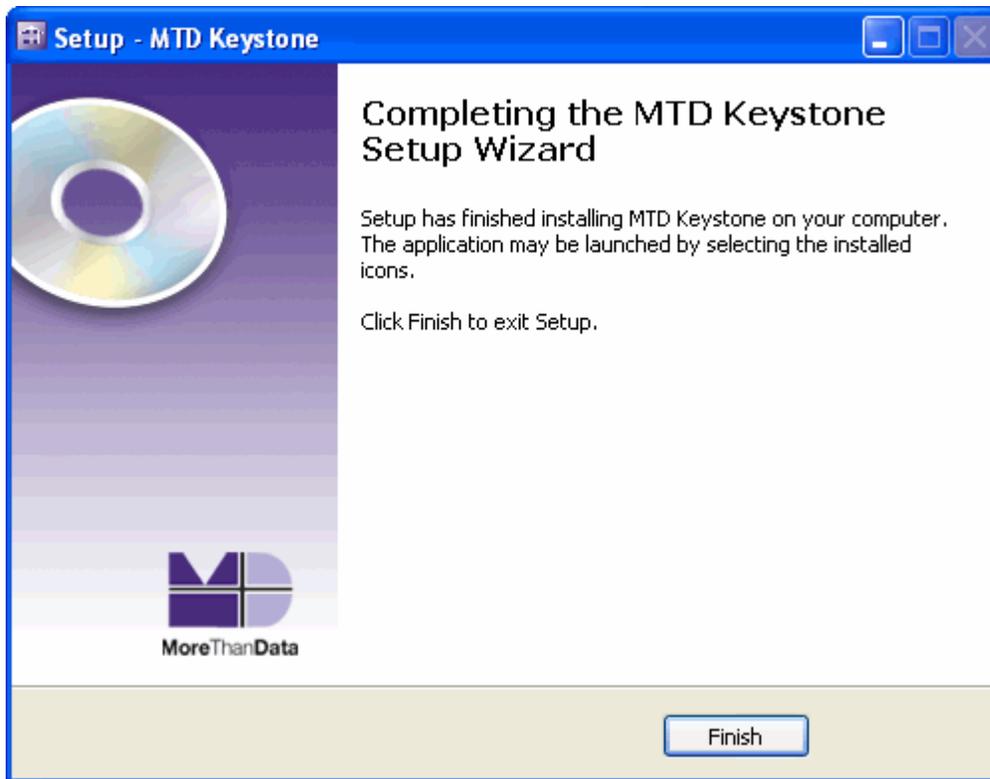
3. The opening screen indicates that Keystone has already been installed on this computer and lists the new user for which Keystone will now be installed. Acknowledge this message by clicking **OK**, then **Next**.



4. The next screen is the *Ready to Install* screen with a file map showing the locations where every Keystone-related file will be stored. You can also find this information in the *File Map.txt* file in you're my *Documents\MoreThanData\Keystone* folder. You can print this file from this location after the installation is complete and keep it for future reference.

Click the **Install** button to start the installation process.

5. When the process is complete, the following screen is displayed. Click the **Finish** button to close the installer.



6. Repeat for any additional users who will be using Keystone on that computer. Remember to follow the instructions under "To temporarily change the User Account type" above if any of those users are not set up as Administrators in Windows. The default password for Keystone is *Keystone*. The default password for Affiliate Setup is *Administrator*.