

Installation

This document contains detailed information for installing CostLink/AE. In this document, you will find:

- What hardware and software you need to run BSD CostLink/AE,
- Descriptions of each type of installation,
- How to install BSD CostLink/AE,
- How to move and uninstall BSD CostLink/AE, and
- How to get technical support.

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Operating Environment

BSD CostLink/AE was designed to operate in 32-bit Microsoft Windows environments, and to take advantage of the additional features and power of those platforms. The preferred operating systems are Windows™ 7, XP, or Vista.

NOTE: In order to install the software you must be logged in with administrator rights.

BSD CostLink/AE System Recommendations

Listed below are hardware recommendations and software requirements for operation of CostLink/AE. As with any Windows application, faster system components and more system memory will enable superior performance of the software. Higher resolution video cards and monitors will enable more information to be displayed on the screen.

Hardware Recommendations

- Intel-compatible processor, 1 Ghz or better
- 512 megabytes of RAM
- 32x CD-ROM reader
- 500 MB of available disk space
- 17-inch or 19-inch XGA monitor (1024 x 768 resolution and matching video card)
- 600 dpi laser printer and matching driver

Software Requirements

- Windows™ 7, XP, or Vista
- Microsoft Internet Explorer version 5.5 or higher
- Microsoft Excel 2000 (version 9.0) or higher if using the Excel linking feature

Before Installing CostLink/AE

Before installing CostLink/AE, review the following information to help you avoid most common installation problems.

Print and Use the Latest Copy of This Document

This document is periodically updated. For the most up-to-date information, print out and use the latest copy of this document from your update CD or from our website.

1. Insert the latest copy of the BSD SoftLink® Products Suite CD-ROM into your CD-ROM drive. The Installation Browser should launch automatically.
2. Click the Install BSD Products option on the right side of the screen.
3. Under CostLink/AE, click *View How to Install*.
4. Alternatively, go to <http://www.bsdssoftlink.com/downloadcenter/userspage.htm> to get the most recent version from our website.

Access Key

After you install CostLink/AE for the first time, you will need to call or email for an access key in order to use the software. The key will continue to work until it is time for your renewal, unless you move the software or upgrade the computer where CostLink/AE is installed. The key is what give you access to the number of licenses that you have purchased.

To obtain an access key, follow the directions in this document for installing or moving CostLink/AE, and then contact CostLink/AE technical support at 800-266-7732, 404-365-9226, or support@bsdssoftlink.com. You will need to provide us with your Access ID, which can be found in the Permissions dialog box as described later in this document.

CostLink/AE technical support is located in Atlanta, GA and office hours are 8:30 a.m. to 5:30 p.m. Eastern Standard Time (EST), on normal business days. If you call or email at other times, it is unlikely you will be able to obtain an access key at that time. If you leave a message or send an email with your Access ID, we will contact you at the beginning of our next business day.

NOTE: If you are moving the software to a new location, you **MUST** call or email CostLink/AE technical support with your Unpermit code in order to get new Access Keys for the new location. See Moving the Software later in this document for directions.

Single User License

Even if your subscription is for a single user, keep in mind that you can install CostLink/AE on your network. A network installation of a single user license allows more than one user (but only one at a time) to access the program. The network installation is described later in this document.

Hard Disk Space

Check your hard disk to make sure you have enough space. You should have at least 500 megabytes available after your CostLink/AE installation is complete to avoid problems with

operations like copying projects. For a new installation, this means you should have at least 800 megabytes available.

Access Rights to Server for Network Installations

If you are installing on a network, all users need to have full edit, create, and delete rights within the CostLink AE folder on the server.

Time and Date

CostLink/AE security is based on a time- and date-sensitive algorithm. This pre-installation checklist ensures that security is set correctly.

Note: English (US) settings are required. If necessary, change in your Regional Options in the Control Panel.

NOTE: Time and date sensitivity applies to all installations—standalone, network, client, and new installations. If it is a network installation, make sure the date, time, and the formats of both the date and time are the same on the server and all the client workstations.

To check to see if the time and date are correct and are in the right formats:

1. From the Control panel, open the Regional Settings dialog box.
2. Click the Date and Time tabs to check the date, time, and their formats.

Close All Applications Before Installing CostLink/AE

Before installing any Windows programs, it is important to close all applications. This includes disabling all anti-virus applications running in the background and the Microsoft Office Shortcut bar. Please refer to your Windows user manual or the following directions:

After closing all applications visible on your task bar (the gray bar across the bottom of your screen), close any additional applications by pressing the CTRL, ALT, and DEL keys to bring up Task Use End Task to close all applications.

NOTE: In order to install the software you must be logged in with administrator rights.

Installation Types

When you start the installation, you will be presented with two installation options – Standalone Installation and Network Server Installation. You will be able to install the Network Client only after completing the server installation.

The number of licenses you purchased, how many different computers need access to the software, and the amount of space on the clients' local drives will determine which of the installations you should choose.

In addition, you may choose one of the installation options in order to install an evaluation copy of the software. The installation options are described below to help you choose which will work best for you.

Standalone Installation

If there is only one computer that needs access to the software, or if you purchased one license for each computer that needs access to the software, perform a Standalone installation.

A Standalone installation is the fastest way to run CostLink/AE since the program and all the system databases are stored on the local drive. Users can choose to store projects on a server so they get backed up. For faster editing speed, store the project on the local drive while editing, and then copy or move to the server when done.

Standalone installations must be installed while sitting at the computer where CostLink/AE will be used. This installation will copy all of the files to the location that you specify during installation.

For complete installation instructions, see the next section of this document. When the installation is complete, follow the directions for getting access keys.

Network Installations

If more computers need access to the software than the number of licenses you purchased, you will need to do a network installation. Network installations require a Network Server installation to the server and the Network Client installation on each client.

NOTE: If you will be running CostLink/AE from a **Citrix server**, perform a Standalone installation on the server only. It is unnecessary to perform Network Server and Network Client installations for a Citrix server.

Network Server Installation

It is recommended that you **perform Network Server installations from a client machine**, not the server, because a reboot is sometimes required after installing. If you install from a client you will only need to reboot the client. If you install from the server, you will need to reboot the server.

NOTE: If you will run CostLink/AE from the server (the computer where the access key is stored) as you would on a **peer-to-peer** network, you will also need to perform a Network Client installation while sitting at the server.

Make sure all computers that will need to run the software have full rights to the folder where you installed CostLink/AE. Users will need to have the rights to read, write, edit, and delete in the CostLink AE folder and subfolders on the server in order to have access to the software.

NOTE: For **Novell** networks, you must also set file locks according to this information on Novell's website: "Load Monitor | server parameters | locks | Change the following parameters: max record locks per connection 3000, max file locks per connection 1000, max file lock 300,000 and max record locks 50,000."

Since the Network Server installation only installs the system databases, you will need to perform a Network Client installation in order to run the software.

Network Client Installations

Client installations must be performed on each client computer that will run the software. Client installations are performed from the Client folder on the server, rather than from the CD or the download file.

For client installations, the CostLink/AE program is stored and run from the client's local drive, and the access key is stored on the server.

Client Install

The system databases (including the RS Means Data) are accessed from the client's local hard drive. The access key (and projects if stored on the server) is the only thing accessed from the server. The database that is installed locally is the RS Means data, which users cannot edit and which does not need to be backed up.

To perform a Client Install, first follow the directions in the next section of this document for a Network Server installation on the computer where the access key will be stored. Then on each client computer that will need to run CostLink/AE follow the directions for a Client Install. After installing the first client, you will also need to follow the directions for getting an access key.

NOTE: If you will run CostLink/AE from the server (the computer where the access key and databases are stored) as you would on a **peer-to-peer** network, you must also perform a Client Install - Minimal on the server.

Additional Client Installation

If you are adding a new client machine to a network that is already running CostLink/AE, follow the directions for the network client installation. You will not need a new key.

Evaluation Installation

If you have not yet purchased the software and are installing in order to evaluate, choose one of the above installations (evaluators usually choose a Standalone installation) and follow the directions for installing it. When you open the software, you will see the message that a valid access key must be entered. Click OK and the Permissions dialog box will open. Call 1-888-BSDSOFT (888-273-7638) and ask to speak with your sales representative to get an evaluation key for CostLink/AE.

For help in navigating the software and creating an estimate, see the tutorial in chapter 2 of the User Manual.

Installation Instructions

The CostLink/AE software and databases are stored on the CD-ROM included with your shipment or you can download the files from our website. The installation process installs all software files to the appropriate locations.

Instructions For All Installations

For all installation types perform the following steps:

1. Make sure your computer meets the system requirements detailed earlier in this document.

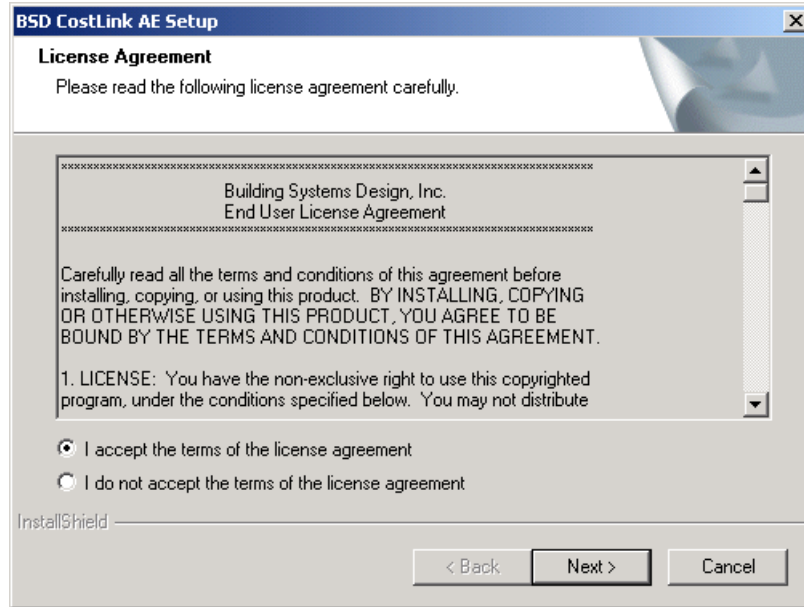
NOTE: You must have administrator rights in order to install the software.

2. Make sure you have at least 800 MB of space available on the drive where you will be installing CostLink/AE. (This is so that you will have at least 500 MB free after installation, which is recommended for best performance of most computer systems.)
3. Check your time and date settings (as described earlier in this document).
4. Uninstall any evaluation versions of CostLink/AE. Uninstall directions are included later in this document under *Moving the Software*.
5. Close all Windows applications (as described earlier in this document).
6. Insert the latest copy of the BSD SoftLink® Products Suite CD-ROM into your CD-ROM drive.

The installation program starts automatically when you put the CD in the drive. If you have turned Autorun off, to start the installation, from the Start menu select Run, then type: D:\setup (where D is the drive letter of your CD-ROM drive) and click OK.

NOTE: If you are installing from the downloaded version, navigate to where you downloaded the file and double click on CostLinkAE_setup.exe. It will start extracting the files.

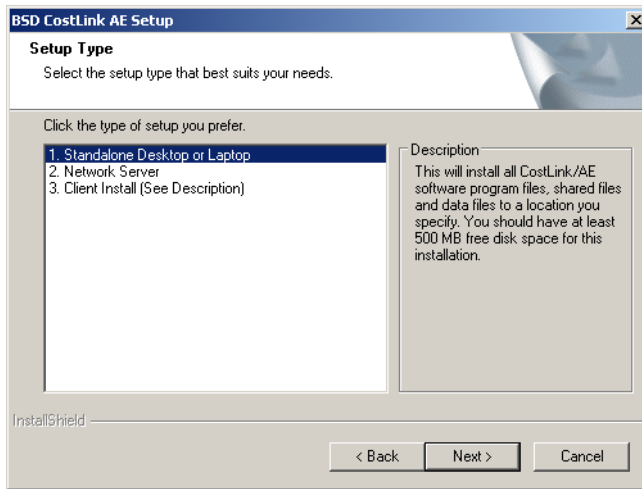
7. In the Main Menu of the Installation Browser, from the choices at the right side of the screen, click Install BSD Products.
8. The Install screen opens. In the list of products, click the **Install** button under BSD CostLink/AE.
9. The CostLink/AE installation starts and the Software License Agreement screen opens:



BSD SoftLink Software License Agreement Dialog Box

10. Review the agreement and click to accept the agreement.
The CostLink/AE Setup Type screen opens. If you need help deciding which installation type to use, click on each option to read the description of what will be installed, and see the previous section in this document.

If you are installing from the CD or download file, you will see this Setup Type screen:

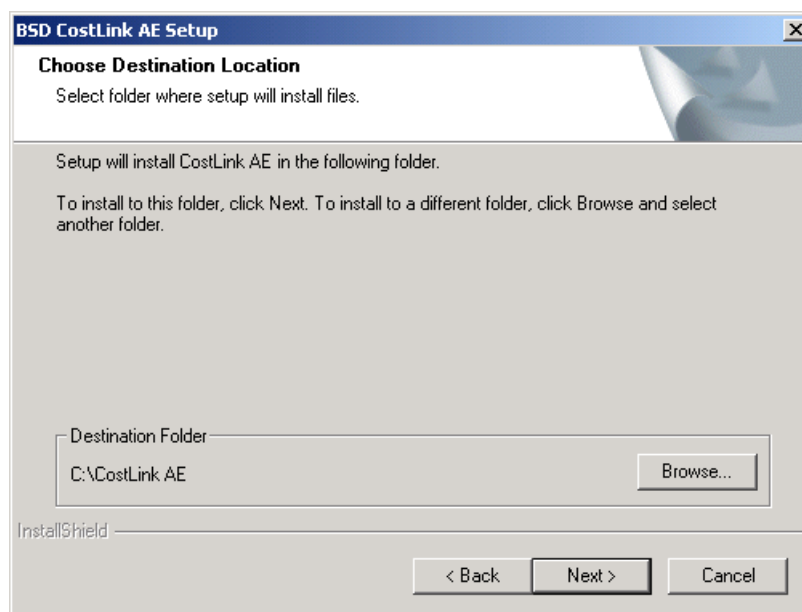


The Setup Type installation screen

11. Choose the installation type, and then click the Next button.

NOTE: For more information on choosing your installation type, see the previous section of this document.

The Choose Destination Location installation screen opens.

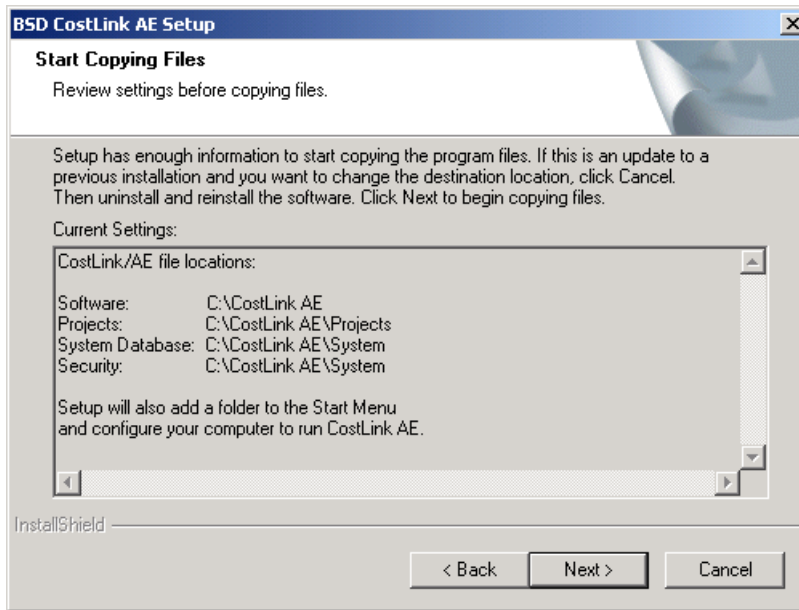


The Choose Destination Location installation screen

12. Select the destination folder. By default, the installation will be made to C:\CostLink AE. If you are performing a **Network Server** installation, click Browse... to choose the path to the server. If you are performing a **Standalone Installation** either accept the default path of C:\CostLink AE, or click Browse... to choose a different location on the local computer. When you are performing a **Network Client Installation** from the server either accept the default path of C:\CostLink AE, or click Browse... to choose a different location on the local computer.

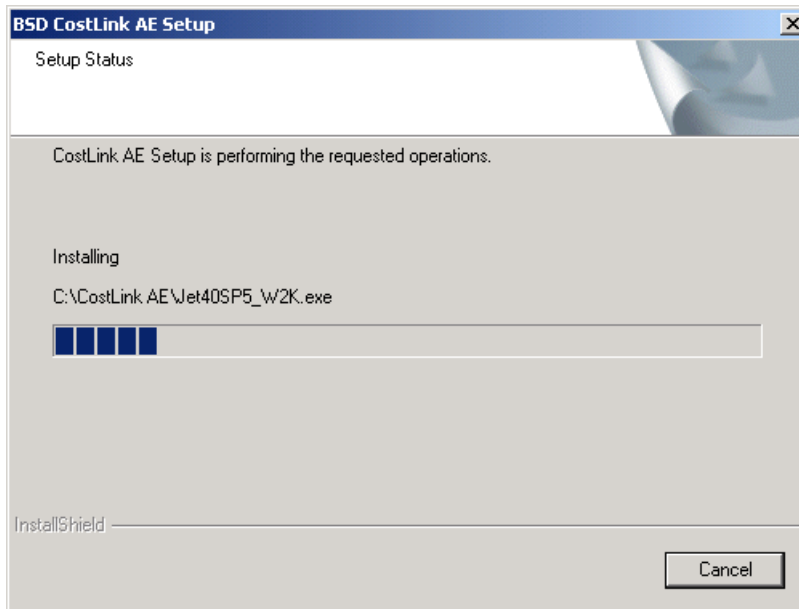
NOTE: The software must be installed to its own folder, and not on the root of a drive. To create a folder when Browsing, navigate to and click on the drive, then click at the end of the Path, and type the folder name (CostLink AE).

13. Once you have selected the destination folder, click Next. Your computer system will be checked to see if there is enough available disk space to install CostLink/AE, and the Start Copying Files window opens.



The Start Copying Files installation screen

14. Review the choices you made during installation. Use the Back button to make any necessary changes. Once you are ready to proceed, click on Next to begin installation. A progress bar indicates the progress of the installation.



Installation Progress Bar

NOTE: If you are installing on Windows™ 7 or Vista, you may get messages indicating that oleaut32.dll and stdole2.tlb did not register. You can click OK and continue. This will not affect the installation.

Installation time depends on the speed of your computer system. Using the recommended configuration, it will take less than 10 minutes. Once the software has been successfully loaded, you may be prompted to restart the computer. If you get this message, you must restart to make sure the installed files are registered properly.

NOTE: If you performed a Network Server installation, you must now perform a Network Client installation at each computer that will need to run the software. Go to each computer and perform the client installation from the CostLinkAE\Client folder on the server. Double click on the setup.exe file.

After Installation

Once the installation is complete, start the software. (You can go through the Start menu to Programs, then BSD SoftLink Products, and then choose CostLink AE. You can also create a shortcut on your desktop.)

NOTE: If you have performed a Network Server installation, you will need to perform a Network Client installation before you can start the software.

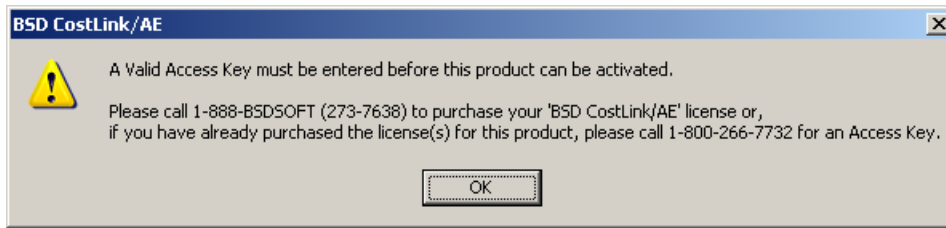
You may get one of two messages:

- Unable to Access Security File (SoftLink.BSD) in the System Path.



CostLink/AE Access message

- A Valid Access Key must be entered before application can be activated.



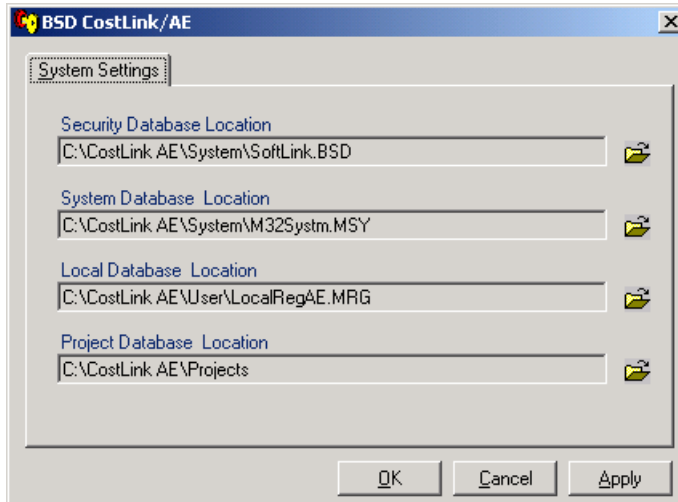
Valid Access Key message

You may get the Security File message the first time you start a client installation or if you have moved the software. Click OK and then follow the directions below for setting the System Settings.

You will get the Valid Access Key message the first time you start a standalone installation, or for the first client on a network installation. Click OK and then follow the directions below for getting an Access Key.

Setting the System Settings

If you get the Security File message and click OK, the Permissions dialog box will open to the System Settings tab.



System Settings Dialog Box

NOTE: For the **Standalone Installation** you will not get the Security File message. Leave the locations set to the local drive.

For the **Network Client Installation**, set the Security Database Location to the server installation, and leave the Local Database Location pointed to the local drive.

To change the system settings:

1. For each setting that you need to change, click the yellow folder icon to the right of the path.

The Open dialog box will open.

2. Navigate to the correct file and click Open.

For the **Security Database Location**, navigate to:

X:\CostLink AE\System\SoftLink.bsd
(where X is the server)

Leave the **Local Database Location** set to the local drive:

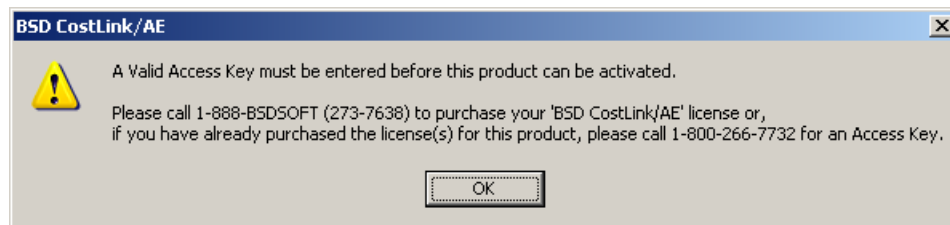
C:\CostLink AE\User\LocalReg.MRG
(where C is the local drive)

For all installations, for the **Project Database Location**, navigate to the folder that you would like to be the default location for new projects.

3. Click Apply, and then click OK.

If you have already entered an access key, CostLink/AE will launch and you are ready to begin using the program.

If you have not yet entered an access key, you will get the following message:



Valid Access Key message

Proceed to the directions for getting an access key.

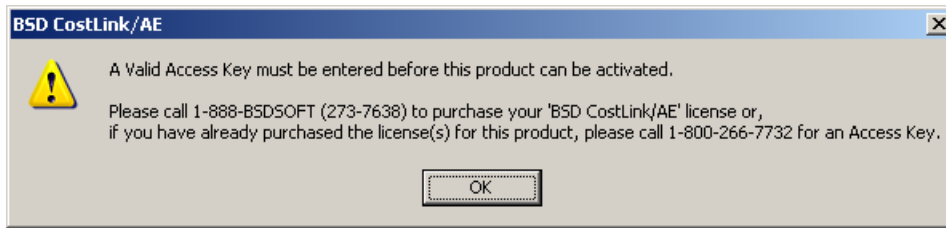
Entering the Access Key

Once the installation has been completed, in order to use the software, you must set your permissions using a special Access key.

If this is a first-time installation, or if you have moved the software, after installing, call CostLink/AE support for your access keys.

To do this, perform the following steps:

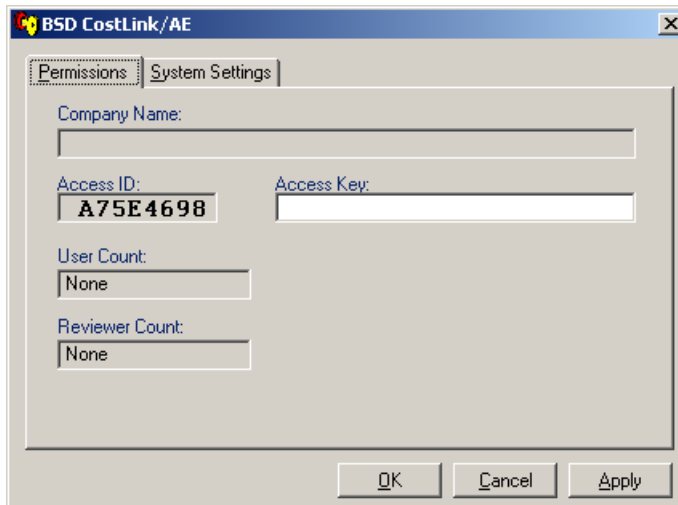
1. Start CostLink/AE. If you have not entered valid keys, you will see the following message:



Valid Access Key message

2. Click OK.

The Permissions dialog box opens.



Permissions Dialog Box

NOTE: If the Permission dialog box does not open, from the File menu, choose Permissions.

3. Call 1-800-266-7732 (or 404-365-9226) to obtain your Access Key (8:30 a.m. to 5:30 p.m. EST, Monday through Friday), or enter your Access ID into an email and send it to support@bsdsoftlink.com.

NOTE: If you are calling and do not have a phone next to the computer, write down the Access ID and then call.

4. Enter the Access Key code that CostLink/AE technical support gives you. Then click the *Apply* button to activate your permissions. Enter your Company Name in the field provided. This will be the default used on your Report Headings.

The *User Count* field displays the number of valid concurrent users allowed by your license.

NOTE: The *User Count* field is set automatically by the access key and cannot be altered except by a new access key.

5. Click OK
CostLink/AE will launch.

You can now open a sample project or create a new project. Chapter 2 of the User Manual is a tutorial that will guide you through the process of creating a new project.

NOTE: Each time Network Server or Standalone installations of CostLink/AE are installed to new hard drives or new folders, a unique Access Key is required. Once the Access Key has been entered, the CostLink/AE software cannot be moved without invalidating your permissions. Follow the directions below for acquiring an Unpermit key before you move the software.

User Count

An unlimited number of users may run the software at a single office location. However, licenses are based on a specific number of *concurrent* users. If you have paid for a 3-user license, for example, only three people may gain access to the software simultaneously. A fourth person attempting to open the software receives a message that the User Count has been exceeded, and access is denied.

If you have paid for a 1-User license, you may find it desirable to increase your User Count in the future, especially if several people need to be working in the software simultaneously. To obtain a new Access Key for an increased User Count, call the 1-888-273-7638 sales number to change your subscription.

Moving the Software

There are five general steps to moving CostLink/AE:

- For Network Server or Standalone installations, Unpermit the software and report the Unpermit code to BSD Technical Support as described below.
- Move project files to a safe location.
- Uninstall CostLink/AE and delete files not removed by uninstall.
- Install CostLink/AE in its new location, and for Network Server or Standalone installation, call BSD Technical Support for a new Access Key as described earlier in this document.

NOTE: In order to obtain an Access Key for a new location, you must have called BSD Technical Support with your Unpermit code for the previous location.

- Move project files to the new location.

Unpermitting CostLink/AE

If you are moving a Network Server or Standalone installation to a new location, you must first Unpermit the original installation as described below:

1. Open CostLink/AE, but do not open any projects.
2. From the File menu, choose Permissions. The Permissions dialog box opens.
3. On the Permissions tab, delete the current Access Key.
4. Click Apply.
A confirmation message will open asking “Are you sure you want to REMOVE this application’s Access Key?”
5. Click OK.
6. A message will open containing your Unpermit code. Call BSD Technical Support at 800-266-7732 or email Technical Support at support@bsdsoftlink.com with the Unpermit code.

Uninstalling CostLink/AE

NOTE: If uninstalling a network server or standalone installation, **do not** uninstall CostLink/AE without first acquiring an Unpermit code as described above.

Uninstalling Network Server Installations

To uninstall Network Server installations, after reporting your Unpermit code, use Windows Explorer to navigate to the server installation and (after moving any project files to a safe location) delete the CostLink AE folder.

Uninstalling Standalone and Network Client Installations

To uninstall Standalone and Network Client installations:

NOTE: For Standalone installations first follow the directions for Unpermitting CostLink/AE.

1. From the Start menu, choose Settings, and then choose Control Panel.
2. Double-click on Add/Remove Programs.
3. Find BSD CostLink/AE in the list of programs and click on it.
4. Click the Add/Remove button.
5. Follow the onscreen directions to remove CostLink/AE, or refer to your Windows User Manual.

NOTE: If asked if you want to remove shared files, click No, unless you will be reinstalling on this same computer.

6. When the uninstall is complete, in Windows Explorer, navigate to the CostLink AE folder.
7. After moving any projects or databases you want to keep, delete the CostLink AE folder.

Technical Support

Unlimited technical support is included in your subscription to BSD CostLink/AE.

For assistance in installing or using BSD CostLink/AE:

Call toll-free 800-266-7732 or 404-365-9226

Fax 404-365-8912

Email support@bsdsoftlink.com

See our website at <http://www.bsdsoftlink.com> for new product development, updates to the User Manual, and other news.

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